The Life-Cycle of Your Project

**Inquiry and Development Stage**
- Principal Investigator (PI)/Project Director (PD) contacts Corporate and Foundation Relations (CFR) for discussions regarding project ideas and potential funders.
- PI/PD prepares draft narrative and budget and sends to CFR to review.
- Other considerations:
  - How will you assess the project?
  - Do you require Macalester match?
  - Do you need support letters?
  - Does your project involve IRB or IACUC?
  - Will there be IPR implications?

**Proposal Submission Stage**
At a minimum of seven business days prior to the submission deadline, PI/PD completes Grant Proposal Clearance Form and forwards to CFR for clearance.

**Approval Needed By:**
- Provost/Vice President for Student Affairs
- Vice President for Administration and Finance
- Assistant Vice President for Finance
- Corporate and Foundation Relations
- Department Chair (If there are dept resource needs)
- Employment Services (If there are staff implications)
- ITS (If there are significant technology implications)

**Award Notification Stage**
- If your proposal is approved, forward any award documents to CFR.
- CFR sends an Award Notification to:
  - PI/PD
  - Provost’s Office
  - PI/PD Department Chair
  - Others as appropriate to project requirements
- CFR coordinates campus and external publicity for projects (please note that not all awards generate a press release).

**Award Set-Up**
- CFR and Grants Accountant complete Grant Data Form.
- Grants Accountant and CFR staff meet with PI/PD, and Grant Administrators as appropriate, to discuss financial and narrative reporting obligations.
- Banner account is activated for new PI/PD and training is provided on its use.

**Project Duration**
In addition to undertaking the objectives of the project, PI/PD is responsible for reporting and funds management as well as ensuring any required student RCR training.
- CFR will provide reminders of upcoming reporting deadlines.
- Grants Accountant will update PI/PD on finances on quarterly cycle.
- CFR will assist in narrative reporting.
- Grants Accountant will prepare financial reports for PI/PD review.
- PI/PD sends copies of annual reports to CFR.

**Changes to Award?**
- PI/PD submits Grant Revision Request Form to CFR if revisions must be made in the proposed work.
- CFR will assist with any required notifications/approvals.
- Grant Data Form will be updated and re-distributed to reflect changes in the grant.

**Project Closeout**
- CFR will provide reminder of final report deadline.
- PI/PD contacts Grants Accountant for estimates of remaining funds.
- Once final report has been submitted and all expenditures have been posted, the grant FOAPAL will be closed.
- PI/PD sends copy of final report to CFR.