



Proposal Development Roles & Responsibilities

Key steps in developing an NSF ATE proposal are listed below. Please consider how responsibility for each step will be assigned within your college's team. Then, select the appropriate drop down choice for each team member. Your choices are:

- **Primary:** Will be chiefly responsible for this step of the proposal.
- **Support:** Will lend help to the team member(s) responsible for this step.
- **Oversight:** Will review and give feedback/approve this step.
- **None:** Will not be involved with this step.

TIP: Assign items based on team members' ability to contribute.

Do NOT assign responsibilities to team members simply to help them feel involved in this process.

INTERNAL PROPOSAL DEVELOPMENT			
	Administrator	Faculty PI/Co-PI(s)	Grant Professional
Proposal Data & Documents			
Create plan to manage proposal files, data access, and submission process.			
Create or adapt tools (e.g., Teams) to execute plan; possibly w/aid from IT staff.			
Execute plan - uploading shared docs, scheduling meetings, tracking tasks, etc.			
Confirm official Authorized Organizational Representative (AOR) is set up in Research.gov .			
Confirm who will submit proposal. Requires <u>both</u> PI and AOR.			
Executive Leadership			
Clarify what executive review/approval is needed before proposal submission.			
Update relevant executives on proposal progress and major changes.			
Involve executives as warranted (e.g., meetings w/key external partners).			
Steer final proposal through executive review/ approval process.			
Faculty & Instruction			
Recruit and confirm final composition of faculty PI/Co-PI leadership team.			
Engage relevant peer faculty in project planning (and its execution, if funded).			
Clarify review/approval process and timeline for curriculum/degree changes.			
Obtain provisional approval for proposed curriculum/degree changes.			
Secure agreement of peer faculty for class-based evaluation tools/methods.			

Administrative & Student Services			
Confirm prime contacts in budget, HR, etc. offices re: proposal-related details.			
Work with HR office to determine and approve proposed hiring/compensation.			
Work with accounting/budget office to develop and approve proposal budget.			
Clarify with accounting/budget office responsibilities to post-award fin. reports and records.			
Request data needed for proposal from Institutional Research (IR) office.			
Work with IR staff to refine data and review/ approve project evaluation plan.			
Work with Student Services staff to plan involvement of relevant offices.			
Work with Facilities staff to budget/ approve equipment and/or building plans.			
Work with recruitment/marketing office to plan recruitment/outreach activities.			
Work after submission with Institutional Research staff to meet IRB requirements			

EXTERNAL PROPOSAL DEVELOPMENT			
	Administrator	Faculty PI/Co-PI(s)	Grant Professional
Proposal Data			
Identify external data needed for proposal (e.g., on local labor market) .			
Obtain external data from appropriate sources, possibly w/Inst. Research help.			
Contractors & Vendors			
Confirm policy on sole-source vs. bidding of services/equipment purchases.			
If permitted, negotiate scopes of work/ compensation, and quotes for equipment.			
Obtain External Evaluator biosketch and assistance with evaluation plan.			
Educational Partners			
Agree with K-12 partners on their proposed roles and budgets.			
Agree with higher ed. partners on their proposed roles and budgets.			
Secure formal letters of commitment from education partners (allow ample time).			
Identify post-submission tasks (e.g. data- sharing agreements) with education partners.			

Industry Partners			
Obtain input/approval for proposed project from program advisory committees.			
Decide how and which employers should ideally participate in project.			
Contact key local employers to solicit their involvement in proposed project.			
Obtain formal letters from employers detailing their planned involvement.			
ATE Program Partners			
Review available resources on websites of relevant NSF ATE Center(s).			
Contact relevant ATE Center(s) and discuss cooperative opportunities.			
Secure formal letters documenting cooperation with relevant ATE Center(s).			
Use NSF award search or referrals to find pertinent current/past ATE projects.			
Contact PIs of pertinent ATE projects to obtain guidance and useful resources.			
Document in proposal how resources, input from other projects will be used.			
Governmental/Other Partners			
Identify additional partners relevant to project: workforce agencies, CBOs, etc.			
Contact additional partners and agree on if/ how they will be involved in project.			
Secure formal letters of commitment from confirmed partners (allow time).			

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