

Quick Reference Guide Overview

The purpose of this QRG is to provide high level information on tasks to be completed by the Investigator throughout the sponsored project lifecycle, as well as further details on roles and responsibilities for both PIs and Collaborative Grant Services (CGS) staff at each stage. The below documents provide additional detailed information for your reference.

Sponsored Project Lifecycle Overview	Outlines high level overview of Investigator and CGS Staff responsibilities and handoffs
Investigator Checklist	Provides step by step checklist on tasks required of Investigator throughout the sponsored project lifecycle
RACI Matrix	Provides details about who is Responsible, Accountable, Consulted, and Informed among staff (e.g., Investigators, CGS, OSPA, RFS, Unit Staff)
Service Catalog	Describes services offered by CGS and what stakeholders' roles are for each service

Key Information for Investigators

Investigators will work closely with their Pre-Award and Post-Award liaisons in the Collaborative Grant Services (CGS) organization for the administration of research grants and awards. Investigators can expect the following services within the Collaboratives:

- A Collaborative Pre- and Post-Award Grant Specialist assigned to serve as a liaison between the Investigator and Office of Sponsored Projects Administration (OSPA) and the Investigator and Research Financial Services (RFS), including managing any requests for changes, approvals, etc.
- Your Collaborative Pre-Award Grant Specialist will provide support for proposal development with timelines, checklists, and compliance checks to ensure timely submission, as well as providing budget and proposal development support.
- Your Collaborative Pre-Award Grant Specialist will assist with Internal Approval Form (IAF) preparation and routing tracking, including informing you of any delays
- Your Collaborative Post-Award Grant Specialist will provide budget and expense monitoring, including preparing monthly forecasting sheets, managing any expenditure transfers, and reviewing reconciliation reports
- Collaborative Post-Award Grant Specialist supports the Investigator with outgoing subaward agreements, including initiating the subaward request form and reviewing invoices from a financial and administrative perspective before sending onto the Investigator for final review and approval.
- Support and coordination of reporting, including ensuring compliance and assisting with any financial reports