OFFICE OF RESEARCH AND ECONOMIC DEVELOPMENT
CENTER FOR FACULTY EXCELLENCE

Building a Solid Foundation

Setting your project up for success from the beginning.

November 13, 2026



FOUNDATION

What You Should Know

- ✓Basic project planning concepts
- ✓How to turn your research plan into a project plan
- ✓Commonly overlooked trouble spots
- ✓Best practices for project launch

PROPOSAL DEVELOPMENT

Solid Foundation Begins with the Proposal



Dazzle them with your research.



Prove you can do it with your project plan.

Elements of a Project Plan

Scope

✓ SMART (Specific, Measurable, Achievable, Relevant, Timebound)

Schedule

✓ Timeline

✓ Deadlines

Resources

✓ Budget

✓ Expertise

✓ Manpower (student power)

PROPOSAL DEVELOPMENT

Lay Out the Plan

Break down project goals into tasks. (Scope)

✓ Specific tasks/steps

Think the tasks through step-wise. (Schedule)

✓ Timeline of tasks

✓ Task overlap

✓ Task dependencies

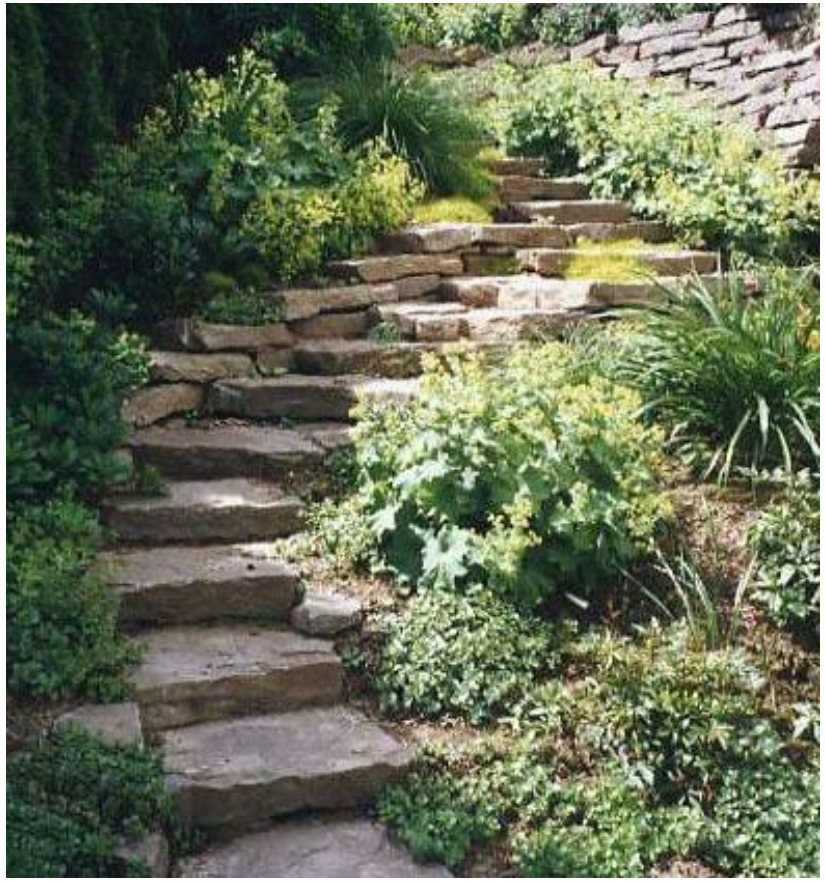
Assign budget costs to each step. (Resources)

✓ Personnel (time per task)

✓ Non-Personnel

Review for failure points.

✓ What happens with missed deadline, failed experiment, etc.?



PROPOSAL DEVELOPMENT

Budget As You Go

Budgeting with your research/project plan will help you:

- ✓ Identify all potential expenses
- ✓ Draft your budget justification and narrative as you go
- ✓ Keep research narrative, budget, and budget narrative aligned
- ✓ Factor in unexpected costs — identify where it can go wrong

Pro Tip: Don't be afraid to involve your bookkeeper.



A solid project plan and budget shows the research is well thought out and likely to succeed!

PROPOSAL DEVELOPMENT

Recommendation: Gantt Chart

Benefits of a Gantt Chart

During proposal

- Clear visual timeline
- Identifiable dependencies
- Keeps planning realistic

During management

- Project tracking, i.e. planned v actual
- Helps align resources with tasks
- Change management tool

Free Excel templates:
create.microsoft.com/en-us/templates/gantt-charts

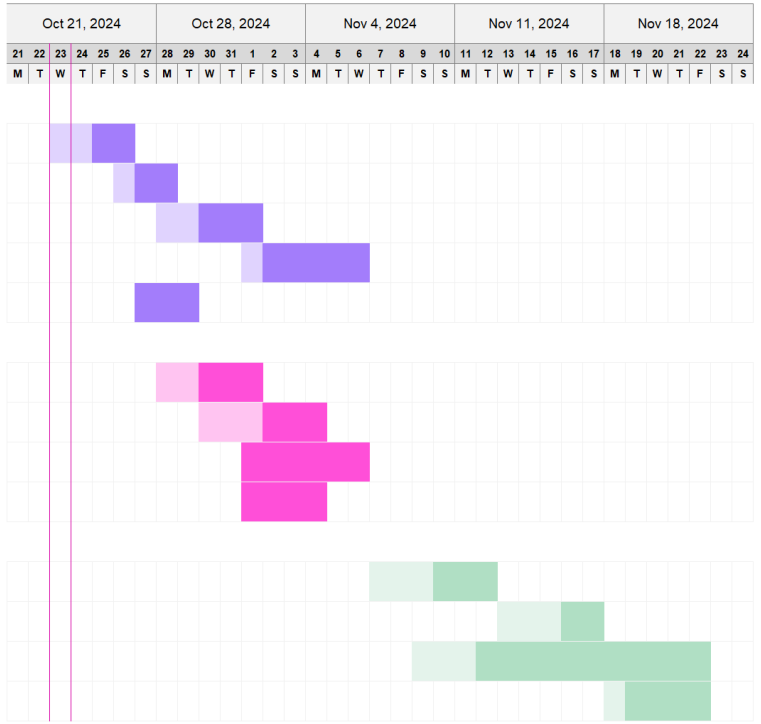
Sample project

Project lead

Project start: Wed, 10/23/2024

Display week: 1

TASK	ASSIGNED TO	PROGRESS	START	END
Initiation				
Define goals	Gokce Aslan	50%	10/23/24	10/26/24
Conduct studies	Hayden Cook	60%	10/26/24	10/28/24
Establish comms	Jens Martensson	50%	10/28/24	11/1/24
Develop charter	Nuria Acevedo	25%	11/1/24	11/6/24
Set up team	Olivia Wilson		10/27/24	10/29/24
Planning and design				
Create schedule	Gokce Aslan	50%	10/28/24	11/1/24
Identify deliverables	Hayden Cook	50%	10/30/24	11/4/24
Define scope	Nuria Acevedo		11/1/24	11/6/24
Identify risks	Olivia Wilson		11/1/24	11/4/24
Execution				
Execute tasks	Gokce Aslan	50%	11/7/24	11/12/24
Monitor progress	Hayden Cook	60%	11/13/24	11/17/24
Provide updates	Nuria Acevedo	25%	11/9/24	11/22/24
Testing and validation	Olivia Wilson	25%	11/18/24	11/22/24



PROPOSAL DEVELOPMENT

Special Considerations

Hazardous Materials

- Hazmat the university does not currently manage
- Larger quantities of material than the university has managed

Facilities Changes

- Changes to physical space – walls, hoods, card reader, etc.
- Changes to utilities – water line, power, etc.

Strict or Unusual Regulations

- International travel
- Export control
- Sensitive Information
  - Controlled Unclassified information
  - Covered Defense Information
  - HIPAA
  - FERPA

Safety or Ethics

Are there complex issues that would benefit from an advance consult?

- **IRB** – Human subjects
- **IACUC** – Animal Subjects
- **Institutional Biosafety Committee (IBC)** – Biohazards
- **Radiation Safety Committee (RSC)** – Radioactive and Lasers

Failing to consider these situations in advance can cause major problems for your project!

PROPOSAL DEVELOPMENT

Don’t Forget!



Management / Admin Tasks

- Hiring and scheduling students
- Technical and progress reports
- IRB / IACUC process
- Project manager? ~10% admin effort

Academic Production

- Paper writing
- Conference presentation

Facilities Upgrades

- Equipment installation
- Hazmat storage or handling

Post-Project Costs

- Data storage
- Sample storage
- Hazmat disposal

Omitted work and costs add up — budget the admin, reporting, storage, and writing.

PROJECT LAUNCH

Launching Your Project

Award Activation

Setting up the award in the financial system (Talon) — internal approvals, budget, effort, and certifications.

Kickoff Meeting

A face-to-face meeting where PIs and support staff align on roles and responsibilities.

Things to know about activation

- Award budgets do not match internal accounting categories.
- The PI will often need to work with the bookkeeper to set up the internal budget.
- Activation will duplicate certain parts of the proposal process – certifications, char/dean approvals, etc..
- Funders sometimes include terms and conditions not disclosed in application.
- If there have been changes since the application, the PI will need to share.
- Kickoff meetings can facilitate the activation process.

PROJECT LAUNCH

Kickoff Meeting

Drills down into project-specific management concerns

All Projects

- Key performance dates
- Roles: PI, bookkeeper, Research, Grant Accounting
- Budget restrictions
- Special sponsor requirements

Expenses & HR

- Purchasing (bid or sole source?)
- Pre-award expenses
- Cost share
- Hiring plans and start dates
- Effort reporting

Data, IP & Compliance

- Data management
- IP ownership questions
- Material or data transfer
- Export control or security
- IACUC/IRB/IBC/RSC protocols and renewals

Subawards & Closeout

- Setting up subawards
- Project wind down (last 60 days)
- Final reporting responsibilities
- PI certifications

Open forum for asking questions, assisted by detailed checklist.

MANAGING THE AWARD

Post-Award Processes



Subawards & Contracts

OSP drafts subawards for research collaboration; Purchasing handles fee-for-service contracts. Use OSP's “Subrecipient vs. Contractor” worksheet when unsure.



Annual & Final Reports

Reporting is a team sport, with different areas contributing; OSP can assist with reporting; funders or individual programs may set unique requirements.



Day-to-Day Operations

Bookkeepers and Grant Accounting keep purchasing, reconciliation, and records on track.



Compliance Functions

Ongoing monitoring keeps the project aligned with sponsor and institutional rules.

QUESTIONS?

Reach out to the Office of Sponsored Programs — we're here to help at every stage.

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