MICHIGAN STATE UNIVERSITY | Extension

Navigating the Grant Process: A Conversation with Grant Experts

MSU Extension Grant & Contract Support

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Supporting MSU Extension staff pursuing sponsored activity opportunities and fee-for-service activities.

What does Extension Grant & Contract Support do?

In the broadest terms, our team helps you bring funding into Extension through sponsored projects (i.e., grants and collaborative agreements) and fee-for-service activities.

This can include:

<u>Support through MSU's grant process</u>

- Finding funding
- Drafting budgets
- Creation of PD and coordination of proposal review
- Review of proposal for compliance with sponsor requirements
- Coordinating submission of proposals

<u>Drafting and negotiating of agreements</u>

- Drafting budgets and agreement language
- Signature collection
- Subaccount set-up
- Invoicing

Our Esteemed Panelists

Mariel Borgman

Katie Brandt

Ana Heck

Kea Norrell-Aitch

Remi Rice

Please introduce yourself and your experience with the grant process.

Why do you apply for grants?

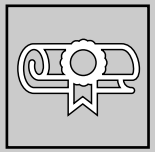
How do salary savings benefit you in Extension?

Salary Savings – Institute Perspective

- Removes salary expenses from general accounts.
- Benefits the institute by freeing up funds to cover broader operational expenses that cannot be allocated to a specific project.
- Benefits the educator by strengthening institute infrastructure and support services.

Thank you to the Extension FOs for their input on this slide!

Principal Investigator (PI) Eligibility

 Michigan State University policy:	Faculty members and research or fixed-term faculty employees of the University with a paid appointment and rank of assistant professor or higher
 MSU Extension policy exception:	Any faculty/academic staff with a master's degree or higher
 Non-academic staff **OR** academic staff without graduate degree	Allowed to serve as Co-Investigator with eligible staff as PI of record Option to apply for an exception using the PI & Co-PI Exception Request form, with Institute Director approval.

What are examples of projects or programs that fit well with grant funding?

How do you decide which funding opportunities to apply to?

Are there any differences between different types of sponsors?

Federal

State

Foundation

Industry

Extension Grant & Contract Support Process

- Review incoming Proposal Request Forms (submit early!)
- Email timeline/deadline dates for budget review, routing, complete proposal, etc.
- Create and process the required Proposal Document (PD) in Kuali Research (KR)
- Work together on building the budget and budget justification
- Assist in providing templates and completing forms needed for submission
- Coordinate with OSP on budget review, proposal review, OSP submitted proposals and obtaining signatures
- Coordinate with other institutions or partner agencies on subawards

What is your process for creating a grant team?

Are there any advantages/disadvantages to applying as lead institution vs. subaward vs. contractor?

What do you think is key to successfully working with collaborators on grants?

Investigator Roles

Principal Investigator:

- All proposals must have a Principal Investigator (PI). The PI is the individual responsible for the preparation, conduct, and administration of the grant, cooperative agreement, public service project, contract, or other sponsored project.

Co-Principal Investigator:

- Co-Principal Investigator (Co-PI) is named on the award and shares all the administrative, fiscal, and scientific responsibilities with the PI. Inform our team if a collaborator is a Co-PI so we can select the Co-PI check box in the Proposal Document (PD).

Investigator Roles (continued)

Co-Investigator:

- A Co-Investigator (Co-I) is considered a key person who makes significant contributions to the project but does not have overall responsibility or authority for the project.

Key Personnel:

- Key Personnel are involved in the project but do not have the responsibilities of the PI or Co-PI or contribution level of a Co-I.
- When added to a proposal, Key Personnel should have their roles defined. Roles could include titles such as Consultant, Extension Educator, Program Instructor, etc.

Investigator Roles (continued)

Credit Allocation/ Credit Split	• KR automatically adds the PI, Co-PI, and Co-I to the PD credit split. The PI should inform our team of the percentage split among the personnel to total 100%.
Route Log in Kuali Research (KR)	• Personnel with a credit split in the PD are automatically added to the route log and are required to approve the PD in KR.
Key Personnel	• Key Personnel are not automatically added to the route log or credit split. If the PI requests it, they can be added to the credit split. KR will automatically add them to the route log, and they will be required to approve the PD in KR.

What does this look like in KR?

Key Personnel

Document was successfully saved.

Search for and add key personnel

Add Personnel

- Jeannine Schweihofer (Principal Investigator) (Certification Incomplete)
- Phillip Tocco (Co-Investigator) (Certification Incomplete)
- Mollie Woods (Key Person: Director)

Credit Allocation

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Post Award Unit: * 10058940

	F&A Allocation
Jeannine Schweihofer	50
10000000 - UNIVERSITY	0
10058940 - EXT AG AGRIBUSINES	100
10058942 - EXTENSION CFE	0
Unit Total:	**100**
Phillip Tocco	50
10058940 - EXT AG AGRIBUSINES	100
Unit Total:	**100**
Investigator Total:	**100**

Kuali Research – Proposal Document Route Log

Route Log refresh

ID: 29381663 hide

Title	Proposal Development Document - Proposal No: 57573; PI: Jeannine Schweihofer; Sponsor: National Inst of Food & Agriculture; Due Date: 03/03/2026		
Type	Proposal Development Document	**Created**	09:28 AM 04/29/2022
Initiator	Grubb, Sarah	**Last Modified**	03:29 PM 05/22/2026
Route Status	**SAVED**	**Last Approved**	
Document Status		**Document Status Modified**	
Node(s)	Initiated	**Finalized**	

Actions Taken hide

	Action	Taken By	For Delegator	Time/Date	Annotation
	SAVED	Grubb, Sarah		**09:28 AM 04/29/2022**	

Pending Action Requests hide

	Action	Requested Of	Time/Date	Annotation
show	**IN ACTION LIST COMPLETE**	Grubb, Sarah	**09:28 AM 04/29/2022**	

Future Action Requests hide

	Action	Requested Of	Time/Date	Annotation
show	**PENDING APPROVE**	Tocco, Phillip	**02:20 PM 07/16/2026**	KC-PD COI
show	**PENDING APPROVE**	Schweihofer, Jeannine	**02:20 PM 07/16/2026**	KC-PD PI
show	**PENDING APPROVE**	Schueller, Jean (DEPT_CHAIR) Bates, Ronald (DEPT_CHAIR) Parent, Zachary (DEPT_CHAIR)	**02:20 PM 07/16/2026**	DEPT_CHAIR: 10058940 - EXT AG AGRIBUSINES
show	**PENDING APPROVE**	(Multiple - expand to see details)	**02:20 PM 07/16/2026**	DEAN_VP: 10058000 - MSU EXTENSION
show	**PENDING APPROVE**	OSPApproverGroup	**02:20 PM 07/16/2026**	Role: KC-WKFLW OSP-Approver from PeopleFlow Name: OSPReview

Collaborating Across Campus

- If collaborating with another department at MSU:
  - Be sure you are added to the proposal in KR appropriately, depending on your role, level of effort, budgeted effort
  - If not listed as personnel on the PD, Extension may not have access to the record later
  - You will not receive academic credit, and it will not appear on your Current & Pending report (your list of proposals and awards)
  - We would not receive any F&A return – we are currently reviewing this topic to create a policy; Just know that if you have budgeted effort, you usually should be added to the credit split in KR.

How do you begin writing a grant proposal?

What is your process for drafting a budget and scope of work?

Scope of Work

- Scope of Work (SOW) describes the activities, services, deliverables and outcomes that will be completed as part of the project.

- Answers the following questions:
  - What will the project accomplish?
  - What work will be performed?
  - Who is responsible for each activity?
  - What are the deliverables and outputs?
  - What are the timeline and milestones?
  - What are expected outcomes?

Grant Budget and Budget Justification

- A budget reflects the spending plan for implementation and execution of your Scope of Work (SOW) within a defined time period

- A budget justification provides a written explanation of each budgeted expense
  - Reviewers may not understand how your budgeted expenses are essential to the project
  - Helps connect budget items to your Scope of Work and provides space to explain why they are necessary
  - Provide clear and concise explanation of the budgeted costs and how they were determined

Preparing to Build a Grant Budget

- RFP, RFA, Solicitation
  - maximum award amount
  - project duration and recommended start date
  - allowable vs. unallowable costs
  - budget categories and formatting requirements
  - indirect cost rate
  - matching/cost share requirements

- Scope of Work
  - activities, timelines, and deliverables in the SOW determine the budget items you require for the project

What changes have you noticed in the grant process over the past few years?

Research Security: Changes You May Have Experienced

- You were automatically enrolled in Research Security Training if currently on or added to a new federal proposal in KR
- Malign Foreign Talent Recruitment Program question on your annual disclosure in KR
- All Covered Individuals included in a proposal must submit Biographical Sketch and Current & Pending documents. Each federal agency defines Covered Individuals differently.
- Many federal sponsors now require SciENcv generated *Common Forms* for Biosketches and Current & Pending Support.
- Requirement of having an ORCID ID (persistent identifier)
- New university Conflict of Interest/Conflict of Commitment policy/process

Research Security: Key Components

- Protects research from inappropriate influence, exploitation, or unauthorized access by foreign entities.
- Helps safeguard intellectual property, research data, and federally funded research.
- Requires disclosure of domestic and foreign affiliations, appointments, collaborations and funding sources
- Ensures conflicts of interest and conflicts of commitment are identified
- Ensures controlled technologies, data and materials are not shared in violation of U.S. export control regulations

When does this policy apply to Extension individuals?

- When an Extension Academic Staff member is responsible for a research grant or sponsored activity.
    - Investigators: Includes the Project Director or Principal Investigator, as well as any other individual responsible for the design, conduct, or reporting of research—regardless of title or position—or identified as a Covered Individual in a federal award.
- During the proposal process these individuals will be required to complete a Project Based COI and Annual Disclosure in KR.
- Extension has its own consulting (outside work for pay) policy that it will continue to follow – MSUE HR is still in discussion about if our form for submitting outside work for pay will change

COI Disclosure in Kuali Research

- This is what we see when we check a PD in KR
  - Verifying Project Based Disclosure
  - Malign Foreign Talent Recruitment Program column has an answer
  - If federal proposal, verifying Research Security Training

COI Disclosure Information

	Key Personnel	Annual Disclosure Date	Project Type	Project Number	Project Based Disclosure Status	Malign Foreign Talent Recruitment Program	COI Training Date	Research Security Training Date
1	Phillip Tocco	07/11/2026 06:21 PM	Proposal	84990	No Conflict Exists	No	10/27/2022	10/16/2025

Biographical Sketch

- A standardized document that summarizes an individual's education, appointments, qualifications, publications and relevant research accomplishments
- Commonly required by federal agencies; sometimes referred to as a Biosketch.
- Most federal agencies now require the common form version through SciENcv
- Non-federal sponsors may refer to the document as a Curriculum Vitae/CV, Resume, or Professional Biography. Format and content will vary by sponsor.

Current and Pending

- A disclosure document that identifies all active and pending research and sponsored activities, resources and commitments associated with Key Personnel.
- Also referred to as Other Support, Current & Pending Support
- Provides a picture to Reviewers of a Key Person's capacity to fulfill the proposed project
- Includes funded, pending and the current proposal
- Identifies effort commitments, regardless if paid effort (0 effort not allowed)
- Most federal agencies now requiring common form version through SciENcv

Current and Pending Resources – RA029 Report

Current and Pending Report

Institutional Proposals with Pending Status

Full Name: Phillip Tocco

Project Role	Institutional Proposal Number	Proposal Type Description	Title	Sponsor Name	Prime Sponsor Name	Total Costs
Co-Investigator	00801066	New	Automated Apple Culling and Cataloguing to Mitigate Labor Challenges and Contamination in Packing Operations for Small and Medium Sized Farms	National Inst of Food & Agriculture		$650,000.00
Key Person	00802524	Resubmission	Modeling Pathogen Inactivation Across the Fresh Produce Supply Chain: A Database for Risk Assessment	National Inst of Food & Agriculture		$650,000.00
Principal Investigator	00848297	New	Promoting produce safety through peer-to-peer positive deviance learning networks	Kansas State University	National Inst of Food & Agriculture	$141,513.96

Current and Pending Report

Active Awards

Full Name: Phillip Tocco

Project Role	Sponsor Award Number	Account Number	Title	Sponsor Name	Prime Sponsor Name	Amount Obligated To Date	Anticipated Total Amount
Key Person	2023-49400-40895	RC116002	Great Lakes Latina/o Farmers Program	National Inst of Food & Agriculture		$749,999.00	$749,999.00
Principal Investigator	2024-70020-43254	RC116843	Crowdsourcing an Image Library: Creating a user generated image library for education and outreach	National Inst of Food & Agriculture		$404,808.00	$404,808.00

Current and Pending Report

Other Potential Projects to Disclose

No Projects to Disclose.

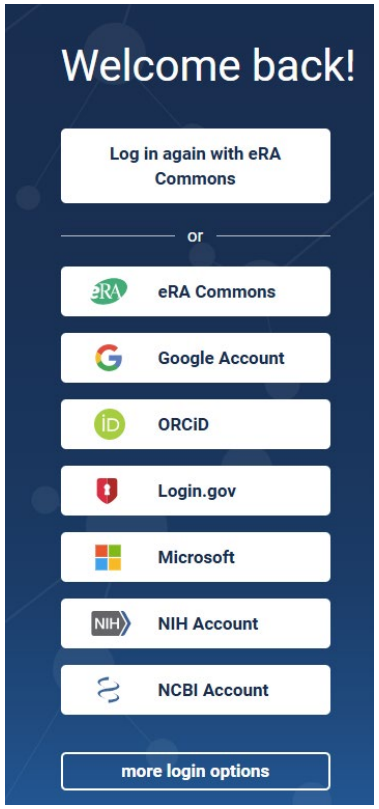
Current and Pending Resources – Effort Reporting

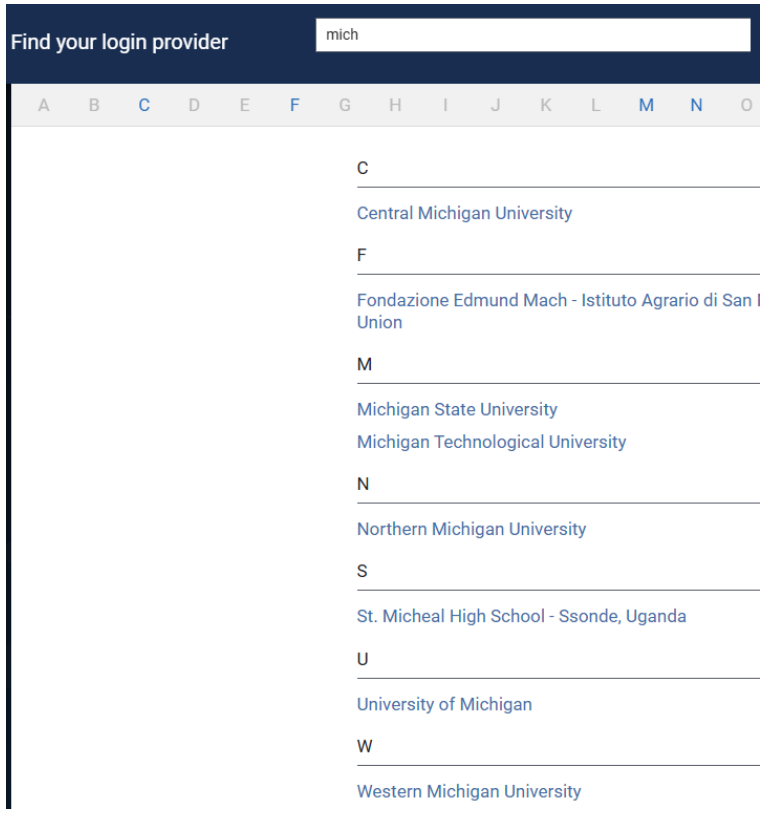
Account #	Project or Account Title / Unit	Academic / Annual Pay		Summer Pay	Cost Sharing or Target Effort		Total Commitment	Enter % Effort Worked
RE100263	MSUE S-L Program Income MSUE DIRECTORS OFFICE(40001212)	20.18%	+	0.00%	0.00%	=	20% (20.18%)	20%
Search By: Account ▾	Type and choose	Add Effort on a Sponsored Project Not Listed Above						
Total other sponsored and non-sponsored activities ⓘ								
GA012861	General Operating - Public Service CANR PUBLIC SERVICE ACTIVITIES(10002141)	79.81%	+	0.00%				
	Total Unsponsored:	79.81%	+	0.00%	0.00%	=	80% (79.81%)	80%
	Total:	99.99%	+	0.00%			100% (99.99%)	100

SciENcv and ORCID ID

- Creating your documents in SciENcv - https://www.ncbi.nlm.nih.gov/sciencv/



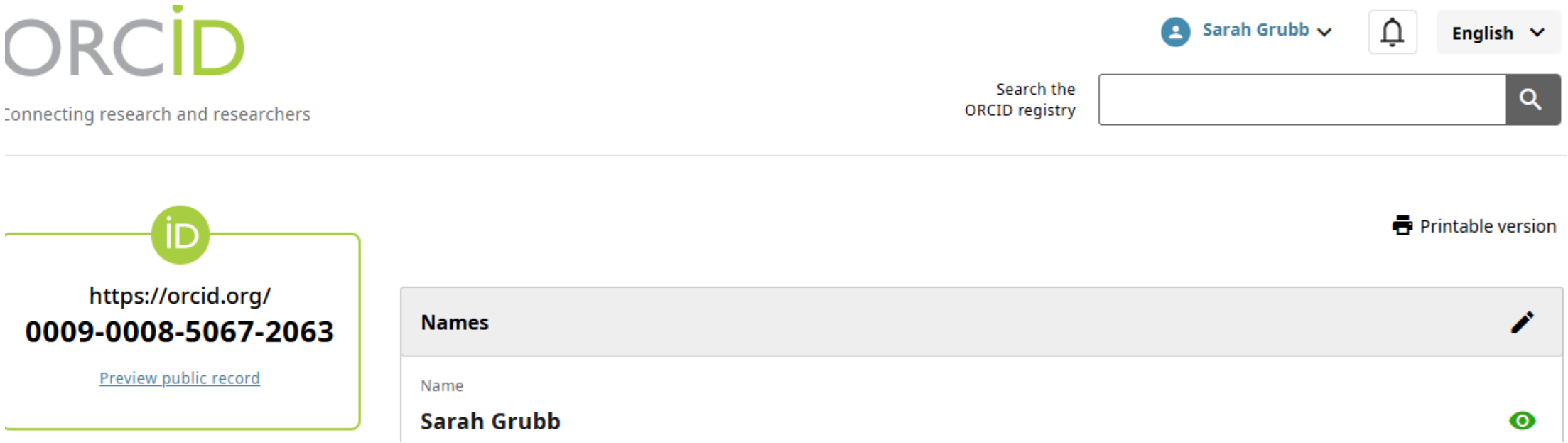




ORCID ID is required.

SciENcv and ORCID ID

- When you need to create an ORCID go to the website and register https://orcid.org/ - Registering is simple!



What is Signature Authority?



- Signature authority is granted to specific individuals and allows them to officially sign legal agreements on behalf of the University.
- At MSU this authority lies with our central administration offices (OSP, CGA, General Counsel, etc.).
- Faculty, academic staff, non-academic staff, and students do not have the authority to sign contractual agreements on behalf of MSU.

What lessons have you learned?

What pitfalls do you try to avoid?

What suggestions do you have for someone applying to a grant for the first time?

Connect with Us

- Weekly Grant Services Office Hours – Join us anytime.

  Every Wednesday, 10:30am to 12:00pm
  https://msu.zoom.us/j/92164311407
  Passcode: 446160

- New website coming soon!

  https://www.canr.msu.edu/od/grants/index

Contact Information – Extension Grant & Contract Support

Email: MSUE.GrantServices@campusad.msu.edu

Proposal/Grant Request Form: https://msu.co1.qualtrics.com/jfe/form/SV_a2BLI5jl8nhz2qG

Service Agreement/Contract Request Form:
https://msu.co1.qualtrics.com/jfe/form/SV_6Kn4WM7UIGgWxYW

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To file a program discrimination complaint, a complainant should complete a Form AD-3027, USDA Program Discrimination Complaint Form, which can be obtained online, at https://www.usda.gov/sites/default/files/documents/ad-3027.pdf, from any USDA office, by calling **(866) 632-9992**, or by writing a letter addressed to USDA. The letter must contain the complainant's name, address, telephone number, and a written description of the alleged discriminatory action in sufficient detail to inform the Assistant Secretary for Civil Rights (ASCR) about the nature and date of an alleged civil rights violation. The completed AD-3027 form or letter must be submitted to USDA by:

mail:
U.S. Department of Agriculture
Office of the Assistant Secretary for Civil Rights
1400 Independence Avenue, SW
Washington, D.C. 20250-9410; or

fax:
(833) 256-1665 or (202) 690-7442;

email:
program.intake@usda.gov.

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Para presentar una queja por discriminación en el programa, el reclamante debe completar un formulario AD-3027, Formulario de queja por discriminación del programa del USDA, que se puede obtener en línea, en https://www.usda.gov/sites/default/files/documents/ad-3027s.pdf en cualquier oficina del USDA, llamando al **(866) 632-9992**, o escribiendo una carta dirigida al USDA. La carta debe contener el nombre, la dirección y el número de teléfono del reclamante, y una descripción escrita de la supuesta acción discriminatoria con suficiente detalle para informar al Subsecretario de Derechos Civiles (ASCR, por sus siglas en inglés) sobre la naturaleza y la fecha de la presunta violación de los derechos civiles. La carta o el formulario AD-3027 completado debe enviarse al USDA por medio de:

correo postal:
U.S. Department of Agriculture
Office of the Assistant Secretary for Civil Rights
1400 Independence Avenue, SW
Washington, D.C. 20250-9410; o´

fax:
(833) 256-1665 o´ (202) 690-7442;

correo electrónico:
program.intake@usda.gov.

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