

Grants & Contract Services: Proposal Process at WHOI

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[Upload Proposals](#) to GCS for External Submission and for submission to Internal Institution Calls

[Overview of WHOI Process for Proposal Submission](#)

1. The Scientist initiates the process by developing the scientific idea and determining the funding agency to which the proposal will be submitted.
2. If the proposal is in response to an RFP or RFQ, the PI must read it completely and carefully follow all details. Unusual RFPs/RFQs should be sent to GCS prior to submitting the proposal.
3. The department staff prepare the budget which includes the amount of salary, benefits, and all associated overheads that will be required to complete the work, as well as travel and other direct costs.
4. Institution routing and proposal information sheet, referred to as The Green Sheet, is attached to the completed proposal which includes all appropriate boilerplate required by the particular funding agency.
5. All Principal Investigators sign the Conflict of Interest statement on the Green Sheet. No one else may sign "for" the PI or Co-PI.
6. The Department Administrator(s) reviews the proposal and signs the Green Sheet.
7. If the proposal totals more than \$75,000, the Department Chair(s) reviews the proposal, signs funding agency cover page, if required, and signs the Green Sheet.
8. The proposal is routed for approval and signature by the Administrator (and Chair when the proposal is greater than \$75,000) of the department of each co-PI.
9. In the case where a GRA is acting as a Co-PI or PI, the proposal must be routed for signature through APO before arriving at GCS.
10. The proposal is reviewed, and signed as appropriate, by the Director of Grant and Contract Services or his/her designee.
11. If the proposal \$250,000 or greater, it is reviewed and signed by the Director of Research or his/her designee.
12. The Proposal is reproduced and mailed by the office of Grant and Contract Services and/or submitted electronically.

Last updated: April 23, 2013

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