

**OHIO STATE UNIVERSITY EXTENSION****Potential Sponsor/Funder – OSP**

*This is to be used as a guide to help Extension Staff to work with OSP Staff to implement new projects. Use this to notify your OSP representative (SPO) as soon as you know of a potential sponsor so they can start the process. It could take up to 2-4 weeks to establish worktags for projects.*

Date: \_\_\_\_ / \_\_\_\_ / \_\_\_\_

SPO Name: \_\_\_\_\_

PI Name: \_\_\_\_\_

Cost Center: \_\_\_\_\_

Anticipated Start Date: \_\_\_\_ / \_\_\_\_ / \_\_\_\_

Anticipated End Date \_\_\_\_ / \_\_\_\_ / \_\_\_\_

Name of Legal entity providing funding to OSU: \_\_\_\_\_

Primary Contact: (At Legal Entity): \_\_\_\_\_

Email: \_\_\_\_\_

Phone #: \_\_\_\_\_

Has this sponsor had other OSU Projects: \_\_\_\_ Yes \_\_\_\_ No \_\_\_\_ Unsure

If yes, name of PI on previous project: \_\_\_\_\_

What is the source of the Sponsor's funding: \_\_\_\_ Federal \_\_\_\_ State \_\_\_\_ County \_\_\_\_ Internal \_\_\_\_ Other  
(OSU is required to report federal funds. Sponsor to provide prime award agreement)

Can this be a multi-year agreement: \_\_\_\_ Yes \_\_\_\_ No

Does the sponsor have an agreement template: \_\_\_\_ Yes \_\_\_\_ No (if no, template will be provided by OSP)

Does sponsor allow Administrative Cost (F & A) \_\_\_\_ Yes (if yes, % to be allocated \_\_\_\_ ) \_\_\_\_ No  
(Please provide confirmation from the sponsor)

Will Sponsor require unspent funds be returned \_\_\_\_ Yes \_\_\_\_ No (Please provide confirmation from the sponsor)

Does Sponsor require reporting to be submitted? \_\_\_\_ Yes \_\_\_\_ No  
\_\_\_\_ Technical/Progress Reports (PI) \_\_\_\_ Financial Reports (OSP) \_\_\_\_ Other (Explain)Will sponsor require invoices? \_\_\_\_ Yes \_\_\_\_ No (if yes, how often do they want invoiced)  
Please provide details or attachment :\_\_\_\_\_  
\_\_\_\_\_

Who is authorized to sign agreement on behalf of the sponsor:

Authorized Signing Official Name: \_\_\_\_\_

Authorized Signing Official Email: \_\_\_\_\_ Phone#: (\_\_\_\_) \_\_\_\_\_

PROVIDE THE FOLLOWING DOCUMENTS TO SPO:

- Budget

\_\_\_\_\_ Detailed Category Budget  
(i.e. - salary, supplies, mileage)

\_\_\_\_\_ Unallocated Category Budget  
(direct & indirect expenses)

- Budget Justification/Narrative and Scope of Work (can be combined). Work with your SPO as you develop a project budget as you will need their approval prior to submitting the budget to the sponsor
- After Budget is approved by SPO submit PA-005 <https://rf.osu.edu/secure/ePA-005/>
- OGC-005 (If Preliminary award is needed, OGC-005 form must be signed by the PI and Chair. OGC-005 Form Link: [https://research.osu.edu/sites/default/files/2022-01/OSP\\_Authorization\\_Excess\\_Funds\\_OGC-005.pdf](https://research.osu.edu/sites/default/files/2022-01/OSP_Authorization_Excess_Funds_OGC-005.pdf))
  - *An OGC-005 form will be needed only if spending must occur on the grant prior to receipt of a fully signed award agreement and sponsor allows pre-award spending.*
- Will anyone need effort (personnel appointed) on the project? \_\_\_\_ Yes \_\_\_\_ No  
if yes, email information to Cost Center Manager (Jesse Buxton)

Comments:

**PI Finds Project**

Project is a Federal Grant, involves federal funds, or is a Grant with an Announcement or Call/Request for Proposals?

Project has no announcement or no proposal required?  
(i.e: school programming)

PI to send link to RFP/funding opportunity/websites to SPO  
*(allows time for PI & SPO to look at proposal together)*

PI to reach out to SPO with Potential Sponsor Guide Form completed

**Complete Budget Template**  
(if PI needs assistance, contact Grant Development Support Unit <[GDSU@osu.edu](mailto:GDSU@osu.edu)> for help.)  
**Email to SPO:**  
1) budget  
2) budget justification/narrative and/or scope of work  
3) Sponsor Form

After SPO approval,  
Submit PA-005  
With all documents attached

If Preliminary Award needed  
Complete OGC-005

If awarded SPO will work with Sponsor to establish a signed agreement; and then create award and worktags in WorkDay; SPO will notify PI and department once worktags are available

If time/effort or personnel appointments will be on project, notify cost center manager (Jesse or Zach)

Terms:  
Scope of Work – include details of project i.e: number of sessions, description of work to be performed, etc. Budget Narrative should be included in the scope of work.

Budget Narrative - do not need to have detailed prices for every single material/supply that you will need, but just the total amount. It would be very helpful if a PI can list for which materials and supplies the money will be used, because that will speed up the process of Requisitions and Expense Report approvals later. Please separate expenses for printing, postage, shipping, background checks, various trainings and various fee payments from materials and supplies, because these show in Workday as Purchased Services costs. You can also use Other direct costs category, if you are not sure if your expense should go under Materials & Supplies, or Purchased Services.