The process begins when the Sponsor sends the Official Notice of Award to Sponsored Projects Office or Industry Alliances Office.

SPO reviews terms and conditions of the award and negotiates, if necessary, with the award sponsor.

SPO accepts the award, issues Phoebe Award Summary (PAS) to the PI and RA, and transmits the info. to CGA via BFS, creating a new fund number.

Together with the PI, the RA develops and uploads the award budget into Berkeley Financial System (BFS).

Contracts & Grants Accounting (CGA) reviews and approves the budget, activates the fund, and notifies PI/RA that the research project can commence.

Where the Award Set-up process fits in the research administration pipeline

- Finding research funding sources
- Proposal development and submission
- Award Set-up
- Award management
- Award closeout

Award Set-up process high-level overview

Begin (PRE-AWARD)

- Began Study:
  - The process begins when the Sponsor sends the Official Notice of Award to Sponsored Projects Office or Industry Alliances Office.

- SPO reviews terms and conditions of the award and negotiates, if necessary, with the award sponsor.

- SPO accepts the award, issues Phoebe Award Summary (PAS) to the PI and RA, and transmits the info. to CGA via BFS, creating a new fund number.

- Together with the PI, the RA develops and uploads the award budget into Berkeley Financial System (BFS).

- Contracts & Grants Accounting (CGA) reviews and approves the budget, activates the fund, and notifies PI/RA that the research project can commence.

End (POST-AWARD)

Award Set-up process working group - process improvements 2017

Automated Emails

Pis will get two automated emails: one when the Official Notice of Award is received, (under development), and the second when the set-up is complete and the PI can begin spending research funds.

Phoebe Award Summary

The redesigned Phoebe Award Summary includes vital information about the award details and the next steps in the set-up process.

Status Categories

Phoebe Search has been enhanced to include Status Categories, informing Pis about the current phase of their award set-up. More detailed status categories will be added over time.

Expeditied Recruiting

Pis can now begin recruiting and interviewing while the award set-up is still in process, only reserving the offer of employment until the award set-up is complete.

Online Dashboard

The SPO website features a dashboard depicting award negotiation times of common funding agencies and research categories.

Informed Consent

New procedure allows PI and the Chair/Dean/Director to approve non-standard but otherwise acceptable terms to expedite negotiations.

Expedited Review

NSF and NIH awards with no outstanding compliance issues will receive an expedited review and set-up (under development).

Simplified Fund Advance

SPO has streamlined the Fund Advance Request for Pis who have assurance of sponsor funding and need to initiate the project before the award set-up paperwork is complete.

Contact information

- Campus Shared Services Research Administration and ERSO
  - Peggy Huston, Chief Operating Officer
  - sharedservices.berkeley.edu

- Sponsored Projects Office
  - Pam Miller, Interim Executive Director
  - spo.berkeley.edu

- Industry Alliances Office
  - Eric Giegerich, Director
  - ipira.berkeley.edu

- Contract & Grants Accounting
  - Kimberly Page, Manager
  - controller.berkeley.edu/departments/Contracts-and-grants-accounting

- Phoebe Search
  - Research Administration and Compliance
  - Rac.berkeley.edu/phoebe/instructions.html