Cardinal Sheet Instructions

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Before you Begin
- https://isufoundation.na1.echosign.com/public/esignWidget?wid=CBFCIBAA3AAABLbqZhC5mZ8_e5pT88Q88-LYRbzM_RINGHuVQBALutzWrVyQHo-
  YRpbuIj5s_fuqHD3nWWk
- Gather required information before initiating the Cardinal Sheet. Once you have begun the
  form, you cannot save and return to it later. The link will time out in one hour.
- Most of the fields on the Cardinal Sheet are required and are noted with a red asterisk. The
  system will prompt you for completion of required fields and attachments before you can see
  the submit button.
- The originator (person entering Cardinal Sheet information and submitting the form) will
  receive a confirmation email once the form has been submitted.
- Preferred attachments are Word, PDF or Excel files.
- All approvers (those who sign) will automatically receive a copy of the completed Cardinal
  Sheet once completely routed.

Principal Investigator Information
- **PI Name**: First and last name
- **PI Email**: ISU email address
- **PI Phone**: Phone number with area code
- **College/Unit**: Enter home college or VP unit. This is equivalent of the RRC resource
  responsibility center)
- **Department/Program**: Enter PI department/program
- **Center/Institute/Extension (if applicable)**: Applicable if an award will be administered
  through a research center or if it is an ISU Extension and Outreach project.
- **Additional PIs**: List additional PI(s) name, college and ISU email address

Funder Information
- **Funder Name**: Enter the full name of the corporation, foundation or other funding
  organization.
- **Funder URL**: Enter funder’s web address – the home page or specific program to which you are
  applying.
- **Contact Name**: Enter name of the person with whom the PI is working, if applicable, or the
  name of the program officer.
- **Funder Address**: Provide the physical address, regardless of the delivery method.
- **Funder Guidelines**: Attach the funder guidelines or enter the full URL where guidelines can
  be located (not the homepage).
Project Information
Proposal Title: Title of proposal as submitted to funder. 100 character limit

Project Description: Provide a concise project description that will easily discern your project from others (text entered here will be used in setting up your gift account if your proposal is successful. 200 character limit

Attach Draft Proposal: A draft proposal is required. An abstract is not sufficient for the Cardinal Sheet to route for signatures.

Funding Purpose: Select the appropriate category for the use of the funds from the drop-down menu.

Method of Delivery: Select the appropriate submission method from the drop-down menu.

Who is Responsible for Submission: Indicate the unit responsible for submitting the proposal.

Submission Deadline: Enter the proposal deadline as indicated by funder.

Funding Decision Date: Enter the date we can expect the funder to decide whether the proposal is funded, if known.

Reporting Requirements: Enter the reporting requirements (i.e.: interim, annual, end of project).

Naming: Indicate whether there is a request or expectation by the funder to receive a named position, program, space, or other, if funds are received.

Other Requirements: State any additional funder requests, such as company involvement in coursework, acknowledgement in publications, attendance at annual meetings/symposia, etc.

Budget Information
Budget Requirement: Indicate whether a line-item budget is required by the funder. If the answer is “yes” you will be prompted to attach the required budget. The budget must be in the format that will be submitted with the proposal. A BoB sheet does not fulfill this requirement.

Grant Period: Enter the dates for the grant period, if known or defined by the funder.

Total Project Cost: Enter the amount of the total project budget. Total must match the attached budget.

Amount of Request: Enter the amount being requested from the funder. This must match attached budget.

Fund Account Number: Indicate “no” you don’t have an account and will need a new fund account established. An account will be established upon receipt of funds. If you are requesting funds for an existing project or fund, select “yes.” You will be prompted to enter the account number.
Gift Fee or Indirect Costs: If the funder allows administrative/overhead or indirect costs, you will be prompted to enter allowable rate (percent) or administrative fee allowed (in dollars). Select “no” only when a funder has published guidelines stating administrative/overhead or indirect costs are not allowed.

Cost Share or Matching Funds: Does the funder require or suggest that a portion of the total project costs be provided by ISU or any another source? If “yes,” you will be prompted to provide additional information.

Restricted Use of Interest Income: State whether the funder places restrictions on the use of interest income. If “yes,” you will be prompted to provide additional information.

Does the project require use of additional space, utilities or remodeling: If “yes,” you will be prompted to provide additional information.

Preaward Budget Contact and Administrative Budget Contact: Provide preaward budget contact information. A preaward budget contact can answer questions about the proposal budget. An administrative budget contact assists the PI in administering the financial aspects of an award. If applicable, you will be prompted for additional contact information.

Additional Comments: Enter additional information related to the budget or indirect costs that may be helpful to those reviewing the Cardinal Sheet.

Compliance Information
Non-USA Countries: Countries other than the United States of America and its territories.

Foreign Nationals: Those who are not citizens or permanent residents (green card holders) of the United States of America.

ISURF IPs: Intellectual property, such as patented inventions, copyrights or software owned by ISURF that will be used in the proposed project.

MTAs or CAs: MTAs are materials transfer agreements are used to transfer biological organisms, germ plasm, etc. and CAs are confidentiality agreements/non-disclosure agreements. These agreements specify rights and responsibilities of each party.

Human Subjects: If human subjects are involved, you must minimally request IRB approval. If you have IRB approval, enter the date and IRB log number. You will be prompted to attach the IRB approval letter.

Vertebrate Animals: If animals are involved, you must minimally request IACUC approval. If you have IACUC approval, enter the date and IACUC log number. You will be prompted to attach the IACUC approval letter.

Recombinant DNA, Human, Animal or Plant Pathogens, or Biological Toxins:
Biohazards include recombinant DNA; human, animal or plant pathogens, and biological toxins. If these materials are involved, you must minimally have requested biohazards approval. If you have secured approval, enter Biohazard log number. You will be prompted to attach your biohazard approval letter.

Radioactive Materials: If radioactive materials are involved you will be prompted to enter the radioisotope/radioactive producing device approval date.
Attachments
A draft of the proposal and a final budget (when a budget is required) must be attached, as prompted. Additionally, the budget narrative and other attachments that may be required can be attached to the Cardinal Sheet at this time. A packet that includes the final proposal and all attachments is required at time of submission.

Additional Comments
Enter additional information that may be helpful to those reviewing the Cardinal Sheet. Information may include questions, comments, etc.

Submission
Enter the name and contact information for the person originating the Cardinal Sheet. Once all required fields are filled, a submit button will appear below. After the Cardinal Sheet is submitted, a routing tree will automatically be attached to the Cardinal Sheet and sent for approvals if the required attachments and fields are complete.

If changes are made to the budget and/or proposal during routing, final documents are required before final approval(s). You will receive a request for final documents from the ISU Foundation.