



Overview of the Regional IPM Centers' Proposal/Project Management System (PPMS)

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The **Proposal/Project Management System** (PPMS) is a database-driven set of on-line applications capable of managing multiple grant programs, from the initial Request for Applications (RFA) through proposal submission, panel review (optional), project selection and project report submission. PPMS currently uses Access as the database, but this could be easily scaled to SQL server, MySQL, or Oracle. The database to web translation uses Adobe's Cold Fusion, Java-based software that works on both Windows and Linux Operating Systems.

PPMS ties every proposal and subsequent funded project to the original RFA and its requirements. PPMS provides a complete and transparent record of all management decisions and reports, plus complete control of all aspects of the grants management process, including contract and invoice information, if desired.

RFA – After the RFA is developed and written, it can be provided on-line in one or more formats (Word, pdf, or HTML). It does not appear on-line until 'activated' by the grants administrator. The grants administrator determines what electronic forms will be required for submission and in what format. He/she provides the needed forms, a description of each, whether each is required or not, and whether multiple copies can be submitted (e.g., for budgets in a multi-year project.) If no forms are provided, PPMS assumes that proposal submission will be through grants.gov, and not PPMS.

Proposal Submission – Individuals must register with the system before submitting a proposal. Once registered, the information is maintained so that annual registration is not necessary. After submission of limited initial information (proposal title, summary, objectives and total funding requested), individuals can submit and replace required forms in multiple sessions until the RFA deadline or they choose 'Final Submission.'

Proposal Review – PPMS allows for selection of reviewers, assignment to different types of review roles (panels), establishment of review criteria, and assignment of specific proposals to reviewers. During the review process, reviewers score proposals online, with comments. All reviewers can see all proposals and appropriate forms, but can score only those assigned to them for review. The grants administrator can see all scores and comments, and determines when /if panel members can see other panel member scores. He/she can also provide a final score and summary comments. Proposals can be ordered by this final score for final review. During actual panel meetings, reviewers can change their scores and comments at any time.

Project Management – When funding decisions are made, the grants administrator can move the successful proposals to project status through a simple form that requires the entry of start and end dates and final funding. All other information (PIs, title, institution, etc) is pre-filled in the form. If projects are coming from an external review (e.g., from grants.gov), summary information from that source must be entered. PPMS allows the grants manager to edit the project for typos and no-cost extensions. The grants manager can establish report criteria for both interim and final reports, and then request an interim/annual or final report for projects associated with any RFA. For final reports, only those projects whose end dates have passed show on the request page. PIs are notified of this request via email that contains a link to PPMS.

The system also allows the Grants Manager to upload the project into the IPM Interagency Database System, if arrangements have been made with that system (see <http://projects.ipm.gov> for more details).

System Statistics – This section provides summary statistics for each RFA: Number of proposals, number of projects funded, success rate, amounts, states funded, etc.

Contract/Invoice Administration - If desired, a simple on-line "account tracking" system can also be activated. The system keeps track of all incoming invoices and allows both project management and PIs to check on invoices submitted and funds remaining.

Guidebooks are available for Grants Administrators, Reviewers, PD/PIs, and Information Technology personnel. Additional information about the system and software availability can be obtained from the NSF Center for IPM, 1730 Varsity Dr., Suite 110, NCSU Centennial Campus, Raleigh, NC 27606. Attn: Ron Stinner (919-513-1432, or rstinner@cipm.info)