




SAN DIEGO STATE  
UNIVERSITY

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Sally Roush  
Vice President

DATE: April 16, 2007

TO: Thomas R. Scott, Interim Chief Executive Officer  
SDSU Research Foundation

FROM: Sally F. Roush, Vice President  
Business and Financial Affairs 

SUBJECT: Grant and Contract Proposal Review Policy

Executive Order 890 requires that the chief financial officer or designee review and approve the fiscal aspects of each grant and contract submission. Following much discussion when the Executive Order was issued, we have implemented a policy based on various factors.

Listed below are the financial thresholds that require submission to my office for approval. I have delegated primary responsibility for review of proposals meeting the listed criteria to Robert Schulz, Associate Vice President, Operations. Proposals may also be reviewed and approved by Scott Burns, Associate Vice President, Financial Operations, or Valerie Carter, Director, Tax and Audit. For proposals that do not meet the thresholds listed below, review and approval is delegated to the Associate Vice President, Graduate and Research Affairs.

**Fiscal Thresholds:** New proposals that meet the following thresholds must be submitted to Business and Financial Affairs for review:

- Total grant or contract amount is over \$250,000
- Indirect cost recovery rate is less than 25% on grants greater than \$100,000
- Cost sharing requirement greater than \$20,000 (not including foregone indirect costs)

Non-competing renewals that do not involve any additional award or financial commitment do not need to be reviewed by this office. In addition to review for financial aspects, proposals containing any of the following will require additional review by Business and Financial Affairs:

- Use of university space: Review by Facilities Planning, Design, and Construction
- Safety Considerations: Review by Risk Management and appropriate committee (e.g. Biohazards Committee)
- Patent/Copyright: Review by TTO

In order to allow for review prior to submission a Business and Financial Affairs designee will be available daily from 11:00 AM to noon to review submissions. After review, the proposals will be delivered to the office of Graduate and Research Affairs.

cc: Stephen L. Weber, President  
Nancy Marlin, Provost