

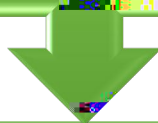
Special Approval Process

USF has detailed guidelines regarding who can serve as a principal investigator for a proposal and award. Eligibility is generally limited to faculty positions (see [comprehensive list](#)). However, some positions can serve as PI with advance approval.

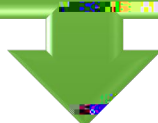
The university has an established process to request this approval. [Click here](#) for a detailed process. A special PI must follow in order to request an exception and be approved to serve as PI. The process is detailed below. This special PI approval must be submitted in writing at least two weeks prior to the proposal deadline.

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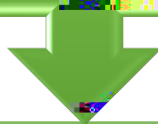
Special PI identifies a funding opportunity and works with supervisor to identify an appropriate mentor



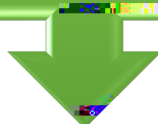
Special PI and mentor sign a Proposal/Project Mentorship form and a Pre-Award Proposal Abstract form and submits to supervisor, division director, chair and copies research administrator



Once approved, supervisor drafts PI approval memo and sends to research administrator with Proposal/Project Mentorship form, the special PI's updated CV and a brief scope of work for the proposed project



Research administrator reviews the memo then sends it via DocuSign to the supervisor, division director, chair and dean for approval. Once signed, the memo, CV and scope is submitted to DSR for approval



Once funded, the mentor and special PI meet at least monthly to go over the project details and complete a Mentorship Log to be retained for their record

Department of Child and Family Studies

Special PI Approval/Mentorship Process

Background: USF has a policy that requires pre-approval for anyone who would not normally qualify to be a principal investigator to serve as PI. That policy can be found here: <https://www.usf.edu/research-innovation/documents/about-usfri/pi-eligibility.pdf>

Process:

1. Special PI identifies a funding opportunity
2. Special PI works with supervisor to identify a mentor
3. Special PI and mentor sign a Proposal/Project Mentorship form
4. Special PI completes a Pre-Award Proposal Abstract f



To: Stephanie Rios, Director, Sponsored Research

Via: Julie Serovich, Dean, College of Behavioral and Community Sciences

From: Lise Fox, Chair, Department of Child and Family Studies

SUPERVISOR NAME, SUPERVISOR TITLE, for Dr. Fox

Date: **DATE**

Re: Approval for **PI NAME** to serve as PI for "**PROJECT TITLE**"

PI NAME has been a **PI TITLE** in the Department of Child and Family Studies since **DATE**. We request approval for **PI NAME** to assume the role of Principal Investigator for this project sponsored by **SPONSOR NAME**.

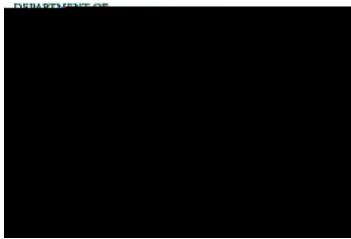
MENTOR NAME, an experienced researcher who has been PI of multiple successful projects, will serve as Mentor/co-PI for this project. As mentor, **MENTOR NAME**, agrees to meet at least monthly to review the budget, effort, deliverables, data, and products being produced. A log from each meeting must be maintained and a Mentoring Form (sample attached) signed by both PI and Mentor for each meeting as a record of mentorship.

PI NAME has attended the CFS professional Development Contracts and Grants course and completed IRB training. **PI NAME** has enrolled/completed management training provided by Human Resources. Attached to this memo is the PI's up-to-date CV and a brief scope of work for the project.

In their current position, **PI NAME** has extensive and highly successful experience serving as a team leader with numerous projects. This experience lends to completing the deliverables in a timely and professional manner **ADJUST WITH RELEVELANT EXPERIENCE**.

For these reasons, we request approval to appoint **PI NAME** as PI for this project.

Thank you for considering this request.



CFS Proposal/Project Mentorship form

Special PI/Mentee Name

Mentor Name

Project/Proposal Title:

Sponsor

Project or Proposal

Special PI/Mentee agrees to

- # For proposals, have the mentor review the complete proposal prior to submission to DSR/the sponsor
- \$ For projects, meet at a minimum of monthly with mentor to review the status of the project and document the meetings using the Project Mentorship form located on the CFS Employee Resources page
- % Review and comply with PI roles and responsibilities as defined by Sponsored Research for PI found here: <https://www.usf.edu/research-innovation/documents/about-usfri/roles-responsibilities.pdf>
- & Follow the CFS mentorship guidelines found here: <https://www.usf.edu/dcs/cfs/documents/cfs-guidelines-mentoring.pdf>
- ' ž Update mentor with any issues, problems, findings, etc. as soon as they arise.

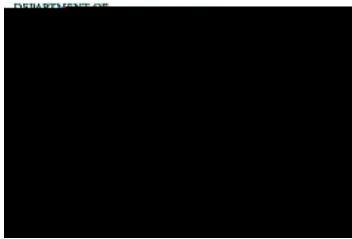
Mentor agrees to

1. For proposals, review the proposal as it is developed and complete a final review of the entire proposal prior to submission to DSR/the sponsor
2. For projects, meet at a minimum of monthly with mentee to review the status of the project and address any issues that arise from the review
3. Review and comply with co-PI roles and responsibilities as defined by Sponsored Research for PI found here: <https://www.usf.edu/research-innovation/documents/about-usfri/roles-responsibilities.pdf>
4. Follow the CFS mentorship guidelines found here: <https://www.usf.edu/dcs/cfs/documents/cfs-guidelines-mentoring.pdf>

Special PI/mentee signature _____

signature/Date

Mentad



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Mentor Name

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