

Process for Developing and Submitting a Proposal for External Funding v202110

LEGEND

RFP: Request For Proposals

CONTACT PROGRAM

RC: PreAward Research Coordinator, Maggie Hutchins, mbutchins@txstate.edu
ORSP: Office of Research and Sponsored Programs, Alex Smith, as55@txstate.edu
Ifind resources at www.education.txstate.edu/coero/preaward

DEVELOP YOUR PROPOSAL IDEA

- Consider the following:
- What is the big idea?
- · What is the research objective?
- · What is the research's impact?
- · How is this research relevant?
- · What research gap does it fill?
- Discuss your idea with your colleagues.
- Complete a Pre-Award Service Request.

CONCEPT/PROJECT SUMMARY

- Draft a Project Work Plan.
- Draft a Concept Paper/Project Summary.
- Work with RC to develop a budget for your concept.
- Ask for feedback from the Associate Dean for Research, RC, and/or colleagues.

FUNDING IDENTIFICATION

- Explore funding sites.
- Sign-up for the PIVOT Funding Database.
- · Identify funding opportunities.
- Review the RFP for eligibility and fit with sponsor's mission and priorities and eligibility.

OFFICER

- Contact the Program Officer.
- Share your concept paper.
- Ask: Is this a good fit for the funding opportunity?
- Stay in touch with the Program Officer throughout the process.
- Ask for clarification.
- Build your relationship for future opportunities.

DRAFT A PROPOSAL DEVELOPMENT PLAN

- Review UPPS 02.02.01
- Deconstruct RFP guidelines
- Create a proposal checklist with deadlines, timelines, required documents, limited submission language, cost share, budget restictions, etc.
- Project Planning
- Formalize your proposal team and establish roles and expectations.
- Schedule team meetings.

NOTIFICATIONS

- Email the Dean, Associate Dean for Research, and Chair.
- Include sponsor, budget estimate, potential course buyouts, facility needs, cost share, and names of PI, co-PI(s).
- Create a proposal record through Kuali Research.
- If you haven't already, complete a Pre-Award Service Request.

PROPOSAL DEVELOPMENT

- Request the letters of support/collaboration early!
- Update your CV or BioSketch.
- Draft your budget & justification.
 Consider any sponsor limitations and ensure it reflects the scope of the work.
- Write your narrative and ask a colleague and/or RC to review it.
- Draft supplemental documents such as institutional overview, data management plan, dissemination plan, current & pending, etc.
- At least 10 business days before sponsor deadline: Finalize your budget and justification and send to ORSP for review.

5-DAY PROPOSAL REVIEW - NEW!

- SUBMIT FINAL DOCUMENTS TO COE.
- At least 5 business days before proposal submission:
- Send all final proposal documents including a draft narrative, and the completed COE Institutional Support Form, to RC for COE compliance review and uploading into Kuali for the 3-day ORSP review.
- Confirm the submission plan with ORSP.

3-DAY RULE FOR ROUTING

• SUBMIT FINAL DOCUMENTS TO ORSP.

- In order for the proposal to meet the 3-day rule, the proposal must be submitted to ORSP 3 [business] days before the sponsor deadline, with all proposal components complete with the exception of the final project narrative (or scope of work equivalent) in final print or entered/uploaded into the sponsor's website or application portal (if electronic submission). View 3-day policy.
- Review and approve routed Kuali Research Action email.

SUBMIT TO SPONSOR

- SUBMIT FINAL DOCUMENTS TO SPONSOR.
- PI reviews final documents for approval to submit to sponsor.
- ORSP cannot submit a proposal without the Pl's final approval. Pl must be available for approval to submit.
- SUBMIT PROPOSAL AND CELEBRATE!

AWARD DENIED OR

- Sponsor notifies PI that they are not awarding.
- If available, request sponsor feedback on proposal.
- Review feedback and share with RC.
- Consider a resubmission.

AWARD NOTIFICATION

 Funding agency notifies PI and ORSP of award.

ACCOUNT SET-UP

• PI and support staff are notified and given access to SAP account.

TRANSITION MEETING

- COERO staff meets with PI, ORSP staff, and dept/college staff to discuss award and prepare for postaward management.
- PI works with Outreach Coordinator and COERO to publicize the award, in agreement with any sponsor publicity conditions.

POST-AWARD

- Complete a Post-Award Service Request.
- · Research cash advances
- Hiring and payment processing
- Consultant/contract payments
- Purchasing & Travel
- · Work with ORSP on agency reports