



Fundamentals of the Proposal Process

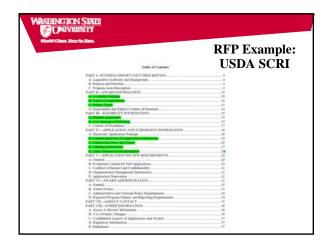
- It starts with an Idea- Faculty member defines a problem and identifies a solution.
- Funding source or opportunity is identified.
- With the help of department, proposal package developed based on instructions provided from the funding agency.*
- Proposal and attachments are uploaded to eREX and routed through ORSO to obtain required signatures.
- ORSO reviews proposal package and submits to Sponsor
- If proposal is funded, ORSO begins award negotiation and acceptance

* ORAP can help with this stage if the proposal is sufficiently large enough, or a identified as a priority by the Office of Research.



Three Tips for a More Successful Proposal

- 1. Read the RFP!!! (Request for Proposal)
 - Also referred to as the Call, Solicitation, or Broad Agency Announcement
 - One of the most crucial and most often missed steps.
- Why is the RFP important?
- The RFP includes what programs/projects/research the agency would like to fund as well as what type of organizations they generally fund (Universities, foundations, corporations, etc).
- The RFP outlines the application's requirements (i.e. maximum funded amount, overhead and cost share limitations, mandatory attachments).
- Includes instructions regarding how to submit and when to submit.



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PART IV-APPLICATION AND SUBMISSION INFORMATIO Only electronic applications may be submitted via Graini, got to NEA in impossor to this REA. We stigs you to subtain early to the Graini, got eyelens. For an overseer of the Graini, got application process see large inverse graini, previously graini, application graining graining graining graining graining graining. The expression of explosions, we recommend that the Payert Dawners Planapal Development on the property of the expression is prepared to wheat Coputational Payers extractive or ACRS to determine of the expression is now to the expression of the expression of the expression is now to the expression of the expression o All the accommendation of the control of the contro Critical information for downloading the Grants.gov package. in the appropriate box and click "Deveload Package." From the search results, click "Dovaload" to active the application package. Information about the Agent Application Guide which sh be used in conjunction with RFP to address all agency requirements. Connect within the application package in the "NFA Courts gav Application Out This guide continue on introduction and general Grants gav instructions, information seem hands. Omes gave assessment as the sensible at Gennia per consumer and the sensible at Gennia per consumer and GEO-SES-SES. The GEO-SES-SES and GENNIA That For on 1000-SES-SES are a words. Closed on fighted beliefers from a great of fillers for $T_{\rm c}^{\rm C}$ days a words. Closed on fighted beliefers from a great per district and the fillers of GEO-SES are a greated fillers for the fillers of GEO-SES are a greated fillers for the fillers of GEO-SES are a greated for the fillers of GEO-SES are a greated from the fillers of the fillers of GEO-SES are a greated from the fillers of the fillers of GEO-SES are a greated from the fillers of the fillers of GEO-SES are a greated from the fillers Funding Opportunity Number (FON)
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Three Tips for a More Successful Proposal

- ${\bf 2. \ PI \ should \ collaborate \ with \ department \ staff \ to \ prepare \ the \ budget.}$
- Identify project specifics (e.g. dates) and collaborators
- Identify how items will be paid if awarded (personal service contract or subcontract)
- · List items that are attractive or unusual (i.e. laptops, fabricated equipment)
- Cost share commitments are rare and must be approved by the department (or outside entity) making the commitment.
- Example of unintentional cost share: Line item in budget charges one
 month summer for PI. Budget justification says that PI will devote one month summer and 25% of each academic semester.



Budgeting Assistance

- ORSO Guideline #2 (Budgeting Assistance Information for Preparing Sponsored Program Proposals)
- ORSO training to obtain budget certification.
- Budgeting for Sponsored Projects class (Research Administration Series).
- \blacksquare All proposal budgets must be certified before they are routed with eREX Budget certified department administrator
- ORSO two weeks prior to deadline for approval
- Guidelines and templates at http://orso.or.wsu.edu

Guidelines and budget template can be found at http://orso.or.wsu.edu



Three Tips for a More Successful Proposal

3. Be mindful of the submission deadline.

- · Recommended that faculty let you know ASAP when they know they will submit a proposal and have all supporting documents and a draft budget completed and to you 2 weeks prior to submission.
- Gather support documents ahead of time (e.g., biosketches, current and pending, letters of support).
- PI should have technical info written on time to allow others to contribute and review.
- ORSO requests proposals to be submitted via eREX minimum 2-3 days in advance of the due date, the proposal must be in final form at the time the eREX is submitted & ORSO must be granted access to it (if required by the submission method).
- · Last minute submissions are often not reviewed which increases the chance of a failed submission to Sponsor.

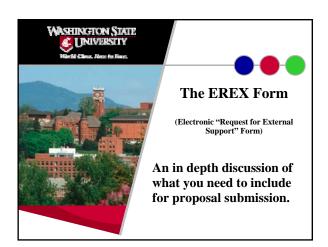


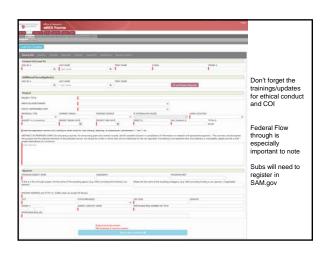
What ORSO will need at Proposal Stage

- Completed and electronically approved eREX Form.
 Approved Budget (uploaded into the eREX, Attachment 2).
- Backup documents (uploaded into the eREX), such as Subcontract budget/letter of support/scope of work, F&A Statement, Cost Share Statement as applicable.
- One copy of the proposal for ORSO in the agency format uploaded into Attachment 1.
- · A hard copy (ies), if required by the agency, with a Request for Shipment Form for your FEDEX package.
- Use the "Special Comments" section for the information a Coordinator will need to know to submit the proposal properly, e.g. if submitting by email, the email address and list of what needs to be sent, any uploads that need to be signed by the Director prior to sending.

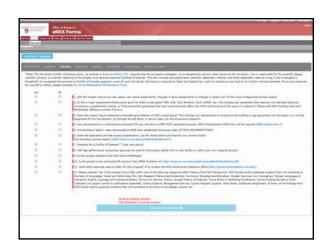


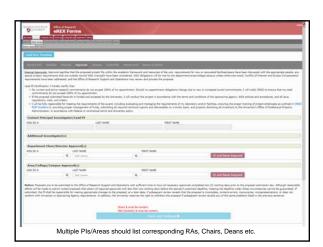


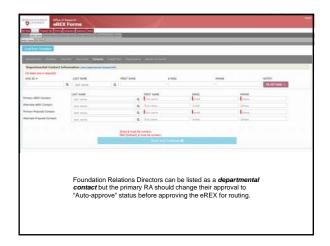


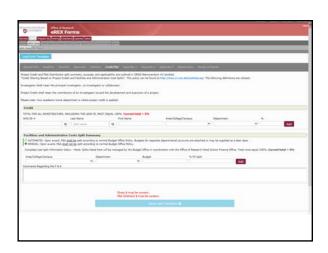


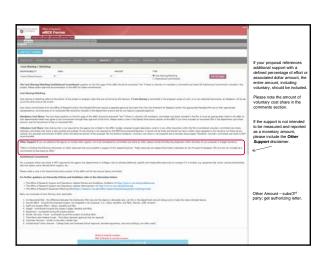


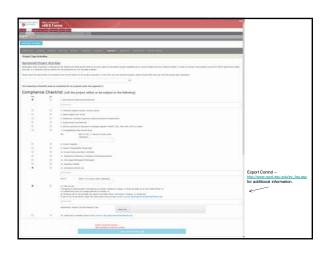


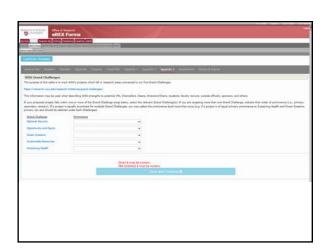


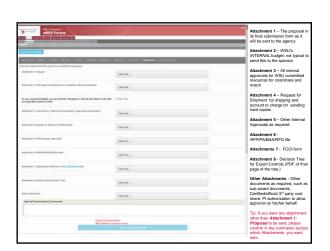














Checks before submitting the eREX

- Budget(s) approved are certified; this includes cost sharing
- \blacksquare PI credit goes to the PIs academic tenure department
- ORSO 2 day review (this clock starts AFTER all approvals are in place, not when you initially submit the REX to ORSO)
- Include specific submission instructions in the Special Comments box
- Is the F&A correct? Attach supporting docs if requesting non standard rate.
- Do the total dollar amounts match on the eREX, proposal, justfication and sponsor budget? Do the dates from the proposal match the eREX?
- Foreign collaboration? Did you attach the Stanford decision tree?
- \blacksquare Is the <u>FINAL</u> version of the proposal attached to the eREX?



MyResearch

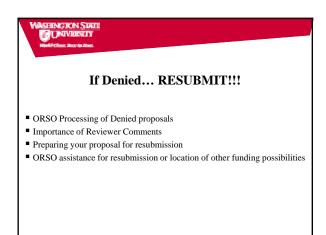
- Your proposal will be logged into MyResearch and given an ORSO Number.
- It will be reviewed by a Coordinator and submitted with the Authorized Institutional Signature once the requirements of WSU and the agency have been fully met.
 - MyResearch is accessed through the ORSO website allowing for inquiries to be made on specific activities for each project.
 - PI's, Research Administrators, and other departmental figures are given access depending on their role at WSU.
- MyResearch (a.k.a ORSO database) provides the WSU Research Community with:
 - Tracking System
 - Dissemination and Communication
 - Reporting



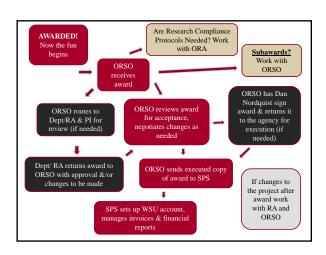
Using MyResearch

- Logging onto MyResearch
- Function Tabs
- PI Dashboard
- Distribution
- Grants Tab
- Award Reports
- Proposal Reports

https://myresearch.wsu.edu/login









If Awarded...

- If you received the award directly, make sure ORSO has a copy
- Check the ORSO Database for updates
- Be prepared for Contract Negotiation
- You may be asked to include MTA's, NDA's and other No-Money Agreements in addition to your contract.
- Subcontracts? Fill out initiation form: http://orso.or.wsu.edu/forms.asp



ORSO Processing

- Receive award/contract
- Log information in database
- Appropriate college review and coordinator review and/or negotiation
- University Authorized Official signature (this is not the PI although they may be asked to sign in addition to the AO)
- Does the information need to be returned to the agency for execution?



Full Execution/Setup

- Distribution of fully executed contracts and awards.
- Award docs are sent to Sponsored Programs Services for account setup
- Help along the way amendments, no cost extensions and other relevant items.
- Reports, reports ours and yours
 - Agency Reports
 - WSU Award and Proposal Reports
 - Financial Reports (SPS)

