
The CLGE Proposal Checklist for the Office of Sponsored Research Services (SRS)

(Note: SRS provides comprehensive proposal support. You may visit their website for additional information:

<http://SRS.tamus.edu/contracts-and-grants/proposal-preparation-and-submission/>)

1. The Principal Investigator (PI) should identify the Proposal Submission deadline, method of submission, and any forms required by the sponsor in their notice for the Request for Proposals (RFP) for your planning purposes.
2. Contact your SRS Proposal Administrator to give the RFP information as soon as you are aware that you will be submitting a proposal. (If you do not already know your proposal administrator, please use the SRS “Who do I contact” feature on their website.)
<http://SRS.tamus.edu/contracts-and-grants/proposal-preparation-and-submission/>
3. Your Proposal Administrator is available to assist the PI with development of the budgets.
 - a. SRS will require the basics from the PI, including start and end dates, personnel with % effort and months, other direct costs including material/supplies, travel, publications, equipment (value), tuition, and any other miscellaneous costs. The format may be in the RFP format or a departmental version. However, SRS will require the final budget to be submitted according to the RFP.
 - b. SRS will want to review the budget in context of the general scope of work to be sure nothing is missed and only allowable costs are included.
4. If the PI does not already have access to the online sponsored contract system Maestro, the PI is required to obtain this access to route proposal submissions.
 - a. This system also allows researchers to search for research opportunities, check the status of proposal submissions, review the contract negotiation status, and review awards and expenses as well as documentation related to the contract.
 - b. To obtain the form to request access, visit <https://maestro.tamus.edu>. You will complete and return this form to your DBA for routing.
 - c. In the upper left hand corner is a login box. Underneath the box for entering a password, is a link titled, “Manage This Account.” Click on that link.
 - d. The new information displayed in the descriptive area to the right includes information on how to obtain access and a link to the form “Request for Maestro Access.” This same form may be used to obtain access if you have a departmental assistant working with you on your sponsored contracts.
 - e. Follow the instructions on the form and email it to maestro@tamus.edu.
 - f. For more information about how to use Maestro, please click on the “For Researchers” tab in the upper left hand corner of the Maestro website.

5. The PI may either begin the proposal routing and submission process through Maestro directly, or the PI may contact their Proposal Administrator to initiate it on their behalf.
6. Basics to include in the routing and submission of proposals:
 - a. The draft proposal narrative and basic budget information should be routed to SRS at least **two to three weeks prior** to the submission deadline to allow the Proposal Administrator to review the proposal for compliance with all applicable rules and regulations of the sponsor, the System, and the University.
 - b. Some forms must be routed through the Office of the Vice President for Research (VPR) for approval if applicable to the proposed project: cost share (whether required or voluntary), Indirect Cost Waivers, conflict of interest forms, and matching request forms. Contact your Proposal Administrator or visit the VPR website to find out more about these forms. <http://vpr.tamu.edu/resources/forms>
 - c. Depending on the nature of the sponsored research or service, a proposal may include a subaward. Work with the Proposal Administrator to complete the documentation required prior to routing the proposal for campus approval. The required subaward information includes budget, scope of work, and a letter of commitment from the subawardee.
 - d. Final budgets (including cost-sharing approved by VPR) and at least draft text should be routed via Maestro for campus approval at least 5 working days prior to the due date. Approvals typically route through the PI, the department head, dean, and system member research representative (VP for Research in our case).
 - e. Final text must be sent to SRS at least two days prior to the deadline. The Proposal Administrator will handle completion of most sponsor forms and do a review of the proposal to ensure that it was completed accurately, the budget is correct, and the proposal will not be rejected due to administrative issues.
7. Once the Proposal Administrator has submitted the final proposal, a copy of the final submissions will be uploaded to Maestro for future reference.