



Oregon State
University

College of Sciences Proposal Support

Oregon State University

128 Kidder Hall

<https://internal.science.oregonstate.edu/rdu>

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Introduction

Proposal support services within the [COS Research Development Unit](#) is designed to assist faculty with proposal preparation support. We offer a variety of services designed to help you be successful with your research. It is our goal to be strong collaborators with COS faculty throughout their proposal development and submission process.

If you would like assistance from our team, you can reach us by email (cos.proposals@oregonstate.edu) to set up an appointment and/or fill in our proposal intake form (beav.es/pex). Feel free to reach out to them to set up a 1:1 appointment, if you prefer. We'd love to help you strategize short and long term proposal planning and preparation. If you are new to OSU, we can guide you on proposal submission process here and assist with any grant transfers.

As there are many pieces to a proposal and strict adherence to agency guidelines and OSU policy is required, we recommend that you begin the approval and submission process well before the deadline. We recommend reaching out to our team at least 2 months before the deadline. The earlier you reach out to our team, the greater the level of support and assistance we can provide. In this document we outline a timeline, a workflow and checklist to help you prepare for proposal submissions. We also maintain a proposal website with helpful guidelines, timelines, resources, FAQs, etc.

Please note that the [Office for Sponsored Research and Award Administration \(OSRAA\)](#) now requires at a minimum five business days prior to the deadline to review and approve your proposals. It's best to submit the Cayuse record for routing You can still work on the project description while the proposal routes, but the budget and justification must be finalized. Additionally, OSRAA now requires all proposals to be submitted to the agency one day prior to the actual due date. They will accept a submission before 7:59 am the day of submission date without labeling it as a rush proposal. OSRAA flags a proposal as rushed in Cayuse and send reports of rushed proposals to the PIs' Dean.

How to reach us

Contact emails

Proposal assistance requests:	COS.proposals@oregonstate.edu
General inquiries:	COS.RDU@oregonstate.edu
Graduate Studies:	cos-gradstudies@oregonstate.edu
How to connect:	128 Kidder Hall, via zoom, or MS Teams

Quick access to Pertinent links

RDU Website: <https://internal.science.oregonstate.edu/rdu>
Proposal Intake Form: beav.es/pex

Funding Opportunities

We post opportunities on our website here: <https://internal.science.oregonstate.edu/rdu/ecos> This [link](#) provides a searchable interface. The PSS team is also happy to help you find funding opportunities, by filling out this [form](#).

Newsletter

We send out a newsletter of funding opportunities, dates of interest, and news items. We don't like spam either, so we try not to overuse our listserv. You can sign up using this link:

<https://lists.oregonstate.edu/mailman/listinfo/cos-research-employees>

Research News is also posted to our [website](#).

Broader Impacts Opportunities and Assistance

Need help finding a Broader Impacts partner at OSU? Would you like assistance with the Broader Impacts or DEI portions of your proposals? Check out our website to find a list of broader impacts partners at OSU and to find out about our DEI consultation service.

<https://internal.science.oregonstate.edu/rdu/broader-impacts-opportunities>

Meet our team

Bettye LS Maddux, PhD

Director of Research Development

Virginia (Ginny) Clary

Proposal Coordinator

Remote

Chris Suffridge, PhD

Proposal Coordinator

Kidder 078, 541-737-3780

Jeff Hare, PhD

Research and Graduate Studies Program Coordinator

Trenéa Moore

Assistant to the Associate Deans

Timeline

Depending on when you reach out to us, we can provide assistance and guide you through the proposal submission process with OSU and the sponsor. We outline our general availability below. The number of proposals we are working on at a given time dictates how much assistance we can provide.

Activities / Timeline	> 3 months	2-3 months	1-2 months	2-4 weeks	< 2 weeks	< 1 week	Day of submission
Strategic Planning (large, complex proposals)	■	■	■	■	■	■	■
Team assembly and coordination	■	■	■	■	■	■	■
NOFO (RFP, FOA) Review	■	■	■	■	■	■	■
Budget development	■	■	■	■	■	■	■
Budget justification	■	■	■	■	■	■	■
Budget review	■	■	■	■	■	■	■
Budget justification review	■	■	■	■	■	■	■
Coordination with subaward institutions	■	■	■	■	■	■	■
Assistance with Cayuse record	■	■	■	■	■	■	■
Assistance with logistical documents	■	■	■	■	■	■	■
Uploading documents into portals	■	■	■	■	■	■	■
Document editing and document compliance checks	■	■	■	■	■	■	■
Coordinating institutional data and letters	■	■	■	■	■	■	■

Key: ■ Service guaranteed ■ Service likely but not guaranteed
 ■ Service depends on availability ■ Service unavailable

How we can help

Let us know what you would like assistance with as you prepare your proposal. Depending on the timing (see above), we're happy to help you with the logistics so you can focus on the writing.

- If you are new to OSU or haven't submitted a proposal in a while, we'll guide you through the proposal preparation and submission process so you can learn how OSU prepares and submits proposals. We provide:
 - One-on-one training with researchers new to the process for proposal submissions. Our online system to submit proposals through OSU for review and approvals through [Cayuse](#).
 - Cayuse system registration and training on the portal
 - Grant budgeting basics: assisting with budget and budget narratives. We also have some [prior workshop videos](#).
 - Coordinating with subaward institutions.
- Once you feel comfortable with the process, we can take over the logistical pieces so you can focus on your writing.
 - Cayuse record creation and/or review.
 - Reviewing the NOFO/RFP/FOA guidelines to ensure compliance.
 - Drafting a checklist for you to follow.
 - Collecting and reviewing required documents.
 - Help with ScienCV biosketches
 - Coordinating with collaborating institutions (e.g sub-awards) to obtain the required documents.
 - Budget and budget narrative review or development. We provide some templates and can assist with personnel costs, or we can develop a draft budget for you to edit.
 - Grant editing and compliance checking as available.
 - Uploading documents into the proposal submission portal.
 - Something else not listed here? Ask us! Depending on the due date and number of proposals in our cue, we'd be happy to assist you.

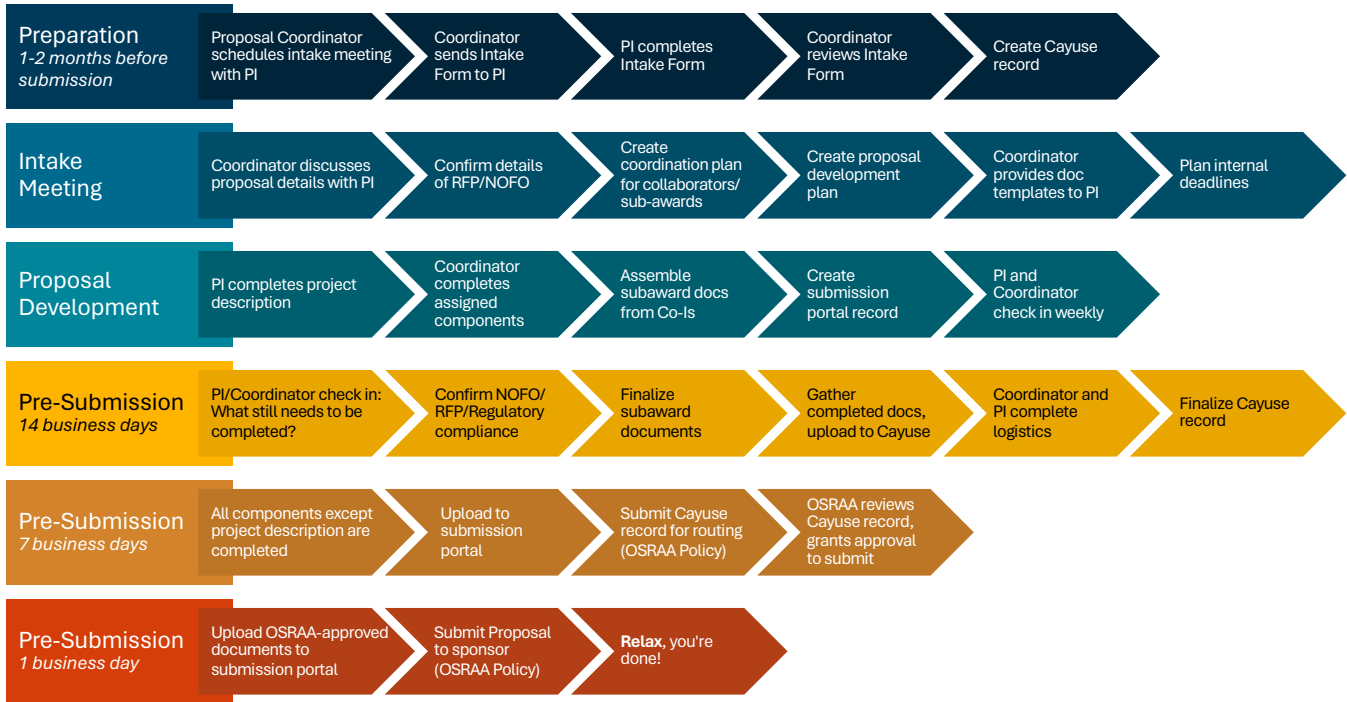
Large, Complex multi-disciplinary, large-scale projects (e.g., training grants, center proposals)

We can help you build a team and/or work with your team to prepare and submit large, complex proposals such as Training or Center grants. We can schedule brainstorming and planning meetings, take notes during the meetings, draft a checklist, develop the budget and justification, collect, refine the logistical documents as needed. Depending on the size of the proposal, we may be able to support hiring a grant writer. We can also help you coordinate a [red team review by the research office](#).

Once funded, the large Center grants or cooperative agreements can get some dedicated post-award support from us, such assistance with hiring and mentoring a program coordinator, subaward contracting requests, and assistance in launching the center. Reach out to us for assistance with your proposal and we can discuss this further.

Process workflow

Proposal Support Workflow



Recommended checklist and timeline for proposal preparation

16+ weeks (especially for big, collaborative proposals) before the deadline

- Pull the team together.
- Develop a timeline and checklist for proposal writing, review, and logistics (Cayuse record and review, budget development, biosketches, current and pending, etc). Proposal Support can develop these with you.
- Contact Proposal Support for assistance on logistics.
- Meet with Proposal Support to discuss proposal needs particularly around large proposals.

8-12 weeks before the deadline

- Reach out to Proposal Support for any logistical pieces (forms, institutional letters, institutional info, etc.) you might need assistance with at this point, so you can focus on writing.
- Work with Proposal Support to create a checklist of all items needed such as support letters, subcontractor documents, cost sharing agreements, etc.
- Prepare the budget and/or work with proposal support to develop your budget
- Create the Cayuse SP Record and Cayuse 424 or external portal application if applicable.

2+ weeks before the deadline

- Complete Cayuse SP (and the agency sites, 424 (a system-to-system interface to submit through grants.gov, research.gov, proposal central, etc).
 - Finalize budget and justification.
 - Attach files needed for OSU approvals (budget, justification, draft scope of work, note, you can continue to work on the research plan after routing).
 - Obtain documented cost share agreements, if applicable.
 - Subcontractor documents, if applicable
 - Budget
 - budget justification
 - Statement of Work (SOW)
 - Letter of Intent from the subcontractor's organization
 - Rate agreement

7+ days before the deadline

- Submit Cayuse SP for routing. This is very important. It can take a few days to get departmental and college level approval signatures and OSRAA requires a minimum of 5 days to review after all units have authorized the proposal.
 - Items you'll need
 - Budget
 - Justification / narrative
 - Cost share approvals, if applicable
 - Draft scope of work
 - Sub award documents
 - Budget
 - Justification / narrative
 - Scope of work
 - [Subrecipient Letter of Commitment \(PDF\)](#)

4-5 days before the deadline

- Upload all ancillary documents (biosketches, current and pending, collaborator files, facilities and other resources, equipment, data management plan, mentoring plans) of the proposal to the sponsor website. You can continue working on the technical proposal and references.
- Assure the ancillary documents meet sponsor guidelines

2-3 days before the deadline

- Review and reply on comments from OSRAA
- Upload any remaining proposal pieces
- After OSRAA approval, notify OSRAA at proposals@oregonstate.edu when your proposal is ready to be reviewed. Please Cc OS-Proposal-Support@oregonstate.edu.

1 day before the proposal deadline

- Complete your project description and references and any other remaining documents.
- Notify OSRAA at proposals@oregonstate.edu when your proposal is ready for submission. Please Cc OS-Proposal-Support@oregonstate.edu
- Give OSRAA full access to your proposal on the portal, if necessary. OSRAA will not submit your proposal without your explicit permission so it's ok to give them full access. Just let them know you aren't ready yet.
- Submitting the proposal 1 day before the actual due date is an OSRAA requirement because,
 - Online systems can be slow on the day of the deadline.
 - Some agencies give you a day or two to fix any issues you or they find *prior to* the due date

Depending on when your proposal is due, we can assist you through the proposal preparation and submission process.

Day of proposal deadline

- Check your proposal with the agency or deal with any submission issues.
- Relax, it's done!

Two examples of a Proposal Checklist

These general checklists can be customized to align with the requirements of the Sponsor's call for proposals. Here we provide general checklists for NSF and NIH, our two biggest funders.

NSF PROPOSAL CHECKLIST

PAPPG 24-1 effective May 20, 2024

Solicitation-specific instructions may supplement or deviate from these instructions. Always read the solicitation carefully.

PROPOSAL FORMATTING RESTRICTIONS (requirements may vary by specific solicitation)

FONT –Use Arial¹ (not Arial Narrow and we do not recommend Arial 10 point; mac users may also use Helvetica and Palatino), Courier New, or Palatino Linotype at a font size of 10 points or larger; Times New Roman at a font size of 11 points or larger; or Computer Modern family of fonts at a font size of 11 points or larger. A font size of less than 10 points may be used for mathematical formulas or equations, figures, tables, or diagram captions and when using a Symbol font to insert Greek letters or special characters. Other fonts not specified above, such as Cambria Math, may be used for mathematical formulas, equations, or when inserting Greek letters or special characters.

TYPE DENSITY – When printed, text in the entire proposal (including figure captions) may be no more than six lines per vertical inch.

PAPER SIZE/MARGINS – Standard page size (8.5 x 11 or 11 x 8.5) with 1-inch margins in all directions required.

PAGE FORMATTING Single column format for the text is strongly encouraged. Do not include page numbers (the system will automatically paginate a proposal).

These requirements apply to all uploaded sections of a proposal, including supplementary documentation.

Cover Sheet

- Solicitation number, and due date (if applicable)
- Requested effective dates usually about six months for NSF review, processing and decision.
- Title follows naming convention, if required (e.g. Collaborative Research, RAPID, EAGER)
- If a LOI was submitted, enter the LOI ID number issued upon submission
- If a preliminary proposal was submitted, provide the Preliminary Proposal Number
- Funding of a Foreign Organization or Foreign Individual. List applicable countries involved if this box is checked.
- International Research/Education/Training Activities. List the primary countries involved.
- Select “Collaborative Status” based on type of proposal submitted
- Off-Campus or Off-Site Research: Check this box if OSU is the lead organization and any organization participating in the collaborative activity involves data/information/samples are being collected off-campus or off-site, such as fieldwork and research activities on vessels and aircraft.
- Co-PIs limited to 4 individuals

Project Summary

- 1 page
- Overview, required headings: Intellectual Merit, and Broader Impacts addressed

¹ We recommend Arial 10.5 or 11 or if you use 10 pt select 1.15x line spacing instead of single spacing (Format > Paragraph > Line Spacing > Multiple > 1.15). Why? Converting to pdf shrinks the font size making Arial 10 illegible.

Project Description

- 15 pages including images and figures (double check the solicitation)
 - Broader Impacts resulting from proposed activities (separate heading)
 - Do not include Uniform Resource Locators (URLs)
 - Results from Prior NSF Support:
 - Restricted to 5 out of the total 15 pages
 - Include each PI and Co-PI who has received NSF funding ended or current (including NCEs) in the past 5 years, regardless of relevance to the proposal.
 - If the project was recently awarded and there are no new results, describe major goals and broader impacts.
 - Required elements per PI/Co-PI:
 - The NSF award number, amount and period of support, the project title
 - A brief summary of the results separated into two distinct subheadings “Broader Impacts” and “Intellectual Merit”
 - List of publications resulting from the NSF award (include full citations or refer to References Cited section); if none, state “No publications were produced under this award.”
 - If the proposal is for renewed support, a description of the relation of the completed work to the proposed work.

References Cited

- For each reference:
 - Required for all proposals, if none, upload a document stating N/A
 - The names of all authors (in the same sequence in which they appear in the publication- no “et al”), the title, volume number, page numbers, and publication year

Biosketch for Senior Personnel (no page limit)

- Must be generated through SciENCv
 - ORCID ID: Optional but encouraged
 - Professional Preparation (REVERSE Chronological Order (highest degree to lowest degree)); includes Postdoctoral appointments)
 - Academic/Professional Appointments (Reverse Chronological Order):
 - Products (5 related; 5 other); Each product must include full citation information; however, “et al” may be used if needed here
 - **Senior Personnel** are required to certify that the information provided in their Biosketch is accurate, current, and complete. This includes information related to domestic and foreign appointments and positions. Certification also includes they are not a party in a malign foreign talent recruitment program.
 - For **Other Personnel**, proposers may include biographical information for Post Docs, other professionals, or students (research assistants) with exceptional qualifications that merit consideration in proposal evaluation. The non-senior personnel biographical information does not need to comply with the NSF Biosketch format but must be clearly identified as ‘Other Personnel’ biographical information and uploaded as a single PDF file in the Other Supplementary Documents section of the proposal.
 - **Equipment Proposals** should provide for each auxiliary user a short biographical sketch and a list of up to five (5) publications most closely related to the proposed acquisitions
 - Upload as a single file per each Senior Personnel associated with the proposal

Current & Pending (C&P) for Senior Personnel

- Must be generated through SciENCv
 - Include all federal and non-federal current projects and pending projects with a time commitment even if they receive no salary support from the project(s).
 - Include in-kind contributions NOT for use on the project/proposal being proposed (such as office/laboratory, space, equipment, supplies, employees, students)
 - In-kind support/contributions that are intended for the use on the project/proposal being proposed to NSF are included in the Facilities, Equipment, and Other Resources.
 - Include funding directed to the individual if it has a time commitment (e.g. gifts)
 - Disclose contracts associated with participation sponsored by foreign governments, instrumentalities, or entities, including foreign government-sponsored or affiliated activities or government-sponsored talent recruitment programs
 - “**This Proposal**” submitted by PI must be listed as pending.
 - Upload as a single file per each Senior Personnel associated with the proposal.

Collaborations and Other Affiliations (COA)

- COA information must be separately provided for each individual identified as senior project personnel in the proposal.
 - Must use NSF Excel template
 - Rows may be inserted as needed and the font size within a cell may be reduced to accommodate long names or other information.
 - Do not alter column size and font type.
 - Information is not required to be sorted alphabetically.

Synergistic Activities for Senior Personnel

- 1-page
- Include up to 5 distinct examples that demonstrate the broader impact of the individual’s professional and scholarly activities that focus on the integration and transfer of knowledge as well as its creation. Examples: innovations in teaching, training, contributions to science of learning, research tool refinement, computational methods, database development broadening participation of URM in STEM, etc.

Budget

- See guidelines for allowable costs.
 - If more than two months of salary in any one year is requested, include justification
 - Itemize equipment listed over \$5000
 - Itemize domestic and foreign travel; include number of days, number of people and location if known (or examples of places your conferences are usually located)
 - Other direct costs, e.g. tuition, human subject incentives, etc.

Budget Justification

- 5 pages; if subawards are included, each subaward justification is limited to 5 pages. Itemize costs, for example:
 - Equipment, listed individually by description and estimated cost.
 - Domestic and Foreign travel is justified including countries to be visited and dates of travel, if known.
 - Subawards, if applicable
 - Materials and Supplies
 - Participant support
 - Other direct costs

- F&A calculations or statement

Facilities, Equipment & Other Resources

- Include aggregated description of internal and external resources (physical and personnel) that the organization and its collaborators will provide to the project, if funded
 - Include unbudgeted faculty, other personnel here
 - Collaborators:
 - Include description of work to be performed provided, must not include any quantifiable financial information
 - Any substantial collaboration with individuals not included in the budget should be described in the Facilities, Equipment and Other Resources document (also include a letter of collaboration from each)

Supplementary Documentation

- Letters of collaboration (any substantial collaboration) should be limited to stating the intent to collaborate and should not contain endorsements or evaluation of the proposed project. The PAPPG suggests standard language:
 - "If the proposal submitted by Dr. [insert the full name of the Principal Investigator] entitled [insert the proposal title] is selected for funding by NSF, it is my intent to collaborate and/or commit resources as detailed in the Project Description or the Facilities, Equipment and Other Resources section of the proposal."

Suggested Reviewers

- List suggested Reviewers or Reviewers not to include. Include mail address and institutional affiliation.
- For reviewers not to include, the reason does not need to be included.

Mentoring Plan as needed

- If a postdoctoral researcher or graduate student is included in the budget, then a mentoring plan is required.
- Limited to 1 page for the entire proposal.

Data Management Plan

- Data Management Plan, limited to 2-pages, check the [directorates](#) to which you are applying for guidelines. See our guidelines in our [FAQ](#).

NIH R01/R21 CHECKLIST

Before you begin, read the solicitation and make sure you chose the correct [funding opportunity](#). Pay attention to the “application and submission information” section. You can use Cayuse 424, which is a system-to-system transfer through grants.gov. Proposals are due before 5:00 local time on the due date. See their [helpful guide document](#) here.

Cover page

Self-explanatory, but please note:

- Box 1. Ensure correct box is checked: “Application” or “change/corrected”
- Box 4a. Box is completed with the NIH grant number if a Resubmission or Renewal, e.g., format: CA123456
- Box 4.b. Agency Routing Identifier: if required by FOA, Applications in response to a NIH Notice of Special Interest require the notice number (e.g., NOT-IC-FY-XXX) to be entered into this field to assign and track applications and awards for the described initiative
- Box 16. The program is NOT covered by E.O. 12372
- Box 17. Agree
- Box 21 – attach the cover letter. Usually optional; used for NIH internal purposes. May be required if direct cost budget equals or exceeds \$500,000 in any one year, application includes a video or large scale genomic data or if PI is submitting under [Continuous Submission](#) guidelines.

Other information

- Project **Summary** /Abstract – 30 lines max; summary of the proposed activity
- Narrative** - short 2-3 sentences for lay audience explaining “relevance to Public health”
- Bibliography and References** – NIH has relaxed their guidance for references see this link for [formatting guidance](#)
- Facilities/Resources** – Identify the facilities available to the program to demonstrate capability of research site to complete the proposal, *include all performance sites*.
- Equipment** – list equipment available to the program to demonstrate capability of research site, *include all performance sites*
- Other Attachments - If required by PA/RFP solicitation. If needed, foreign justification is attached here.

Research and related senior/key people

- All Senior/Key persons, including Other Significant Contributors, MUST provide eRA Commons User ID in the “Credential” box.
- Ensure the required (*) sections are completed (address, e-mail, phone number and use a 9-digit zip code).
- List collaborators and Consultants after other Senior/Key persons
- Biosketches required for ALL persons listed in this Senior/Key Person Profile page.
 - Note: 5-page max biosketches – [ScienCV](#) is great for NIH biosketches as well as NSF
 - Personal Statement: Brief description of experience and qualifications for the role in project. May cite up to *four* publications or research products that highlight experience and qualifications for the project
 - Positions and Honors: List in reverse chronological order all current positions and scientific appointments both domestic and foreign, including affiliations with foreign entities or governments.

- Contributions to Science: describe up to 5 of their most significant contributions to science.
- Up to *four* papers accepted for publication or research products that are relevant to the contribution may be cited. Optional: provide a URL to a full list of published work. This URL must be to a Federal Government website (a .gov suffix). NIH recommends using [My Bibliography](#). Providing a URL to a list of published work is not required.

Research Plan

- Introduction: only needed for resubmission or revision, 1 page
- Specific aims: 1 page
- Research Strategy: 12 pages for an R01, 6 pages for an R21
 - Significance
 - Innovation
 - Approach
 - New proposals should include preliminary studies, renewals/revisions should include a progress report
 - Progress report publication list – for renewals only
- Human Subjects
- Vertebrate animals: will need a document
 - Description of procedures
 - Justification
 - Minimization of pain and distress
- Select agents
- Multiple PI plan, if applicable
- Consortium/ contractual arrangements document
- Letters of support
- Resource sharing plan
- Other plans (e.g. NIH data management and sharing plans. Applicants subject to both the [NIH Data Management and Sharing Policy](#) and the [NIH Genomic Data Sharing Policy](#) must attach a single Plan including elements for both policies.
- Authentication of key biological and/or chemical resources.
- Budget – two forms, see [this link](#) for explanations
 - [Modular](#), when requesting \$250,000 or less in direct costs per year or as directed by the solicitation
 - [Detailed budget](#) – when requesting \$250,001 or more in direct costs per year or as directed by the solicitation
- Other documents as directed by the solicitation