COERA Proposal Process

*Announcement to Submission: Proposal Management through COERA*

When you identify a proposal opportunity (RFP) for which you’d like to apply, please send the RFP information (attached files and/or links) the Pre-award Grants and Contracts Specialist, listed below:

- Liz Kogan – liz.kogan@austin.utexas.edu  [C&I, EDP, ELP, SPE]
- Angela Adair – angela.adair@austin.utexas.edu  [KHE]

Your specialist will briefly review the RFP to confirm your eligibility, UT’s eligibility, and the proposal deadline. As soon as possible, please fill out the COERA Proposal Submission Form (COERA PSF) and submit online.

**Proposal Narrative (Statement/Scope of Work/SOW):**

*Click Here to Expand*

Please send the COERA a draft of the proposal narrative describing the research to be accomplished as part of the project. We will edit and comment on the document for compliance with mandatory RFP requirements (e.g., sections needed in the proposal narrative, page length, font size, etc.).

**Budget and Budget Justification:**

*Click Here to Expand*

For most budgets, the specialist will ask to meet with researchers in person to collaborate on budget preparation. For small, simple budgets, email or phone correspondence may suffice. The COERA will prepare the budget in the budget template using the information you provide and then send it to you for review and/or changes.

To assist the specialist in creating a budget draft, please provide the following information, if applicable:

1. **A List of UT Personnel** who will work on the project (faculty / researchers / GRAs / etc.) and the number of months/percent effort per employee
   - a. If requesting a course buyout, we require assurance that the Chair of your department has granted permission.
   - b. If GRAs are included in your budget, UT requires budgeting for tuition remission unless the sponsor specifically prohibits it. Tuition rates are set as per Graduate School rates.

   **Note**
   *We will calculate fringe and tuition automatically based on current rates.*

2. **Materials and Supplies**, itemized with estimated or exact prices. This includes computers, software, and software licenses.
3. **Special Equipment**, defined as any one item or set of items that is $5K or more with a useful life of 1 year or more.
4. **Consultants** you expect to hire for the project (either named or TBD) and the rate at which you will hire them (i.e. number of hours and rate of pay). Please see information about additional consultant requirements below.
5. **Subcontractors** you will use, including a separate budget for each subcontractor, if applicable. Please see information about additional subcontract requirements below.
6. **Service Providers**, including a rate schedule/quote and letter of commitment if named.
7. **Participant Incentive Costs for Human Subjects**, including number of subjects and payment.
8. **Travel Expenses** for each trip, including:
   - a. Individual(s) traveling
   - b. Travel destination
   - c. Number of travel days
   - d. Transportation Costs outside of the norm (rental car, plane, train, etc.)
   - e. Conference name for more accurate estimated conference fees, if applicable
9. **Other Costs** not addressed in the above categories.

   **Note**
   *We will calculate indirect costs (F&A) based on the RFP and current UT guidelines.*

The specialist can help you think through any of the above points and provide templates and examples. Once you have specified the budget information, the specialist will coordinate with you to finalize the budget. After the budget is finalized, the specialist will draft a
budget justification for your review and input.

**Contractors/Consultants/Subawards:**

**Subawardees**

If you are collaborating with a Co-PI at another institution and we are subawarding to them, we will need the following:

1. A letter of commitment signed by an authorized signer (normally someone at their Office of Sponsored Projects).
2. An itemized budget including their institution's indirect cost rate and rate agreement.
3. A budget justification.
4. A statement of work for their portion of the work to be performed.

**Consultants**

For consultants, we will need the following:

1. A letter of commitment that includes their fee agreement (i.e. number of hours and rate of pay). If the consultant is providing their services at no cost to the project, a statement to that effect must be included in their letter.
2. A biosketch for key personnel consultants.

**Human (IRB) or Animal (IACUC) Subjects:**

If your project will include human subjects or animal participants, please review the sponsor’s requirements. Most sponsors don’t require IRB or IACUC approval at the submission stage, but occasionally some do. Even if a sponsor does not require IRB approval up front, they may require information about participant consent/protection within the proposal.

Regardless, please let us know if your project will involve human subjects or animals so that we can note that information in the OSP system. Please be aware that the IRB application MUST be completed and approved before an award can be made at UT-Austin.

**Additional Documents:**

Occasionally the sponsor requires additional forms and documents, such as specific budget forms, current/pending support, and biosketches. Most of the time, sponsors require biosketches/CVs for PIs, Co-PIs, and other key personnel, such as consultants. Please send us the required biosketches/CVs for your research team, in the format specified by the sponsor. We will coordinate with you to fill out additional budget forms, current/pending support descriptions, other required forms, and any additional financial or proposal-specific information.

**Submitting a Proposal:**

The specialist is responsible for uploading the proposal files to the sponsor specific submission portal (e.g. Grants.gov/Cayuse, Fastlane, DoD, Hogg, etc.) and filling out the online application materials, if applicable. We will coordinate with you if this requires setting up a username and password for these submission portals. We will also communicate with you about any additional information we may need from you in order to fill out online application materials.

After all proposal documents have been collected and the relevant materials have been finalized, the specialist will submit the proposal to OSP for review and approval via UT’s Research Management System (RMS). We will coordinate with OSP about any changes that they require, and if additional information is needed, we will communicate with you about those items. As the deadline for your grant submission approaches, please be available via email or phone in case any other questions arise.

After OSP approves the proposal, the specialist will submit the proposal to the sponsor on the PI’s behalf via the sponsor-specific submission portal, or via email/mail, if applicable. Upon submission, we will notify you via email and follow up periodically on the status of the proposal.

**Tip**

We have specific instruction documents for NIH, NSF, and IES proposals, respectively, which outline sponsor requirements.