

RDS Proposal Development Timeline

This policy only applies to proposals where UMass is the Lead Organization

Blue Text = PI's Responsibility – Black Text = Collaborative – Green Text = RDS's Responsibility

6 - 8 weeks before sponsor deadline

- The PI will submit Assistance Request Form (ARF) for **Complex proposals** (multi-subcontracts, cost share, international, complex budgets forms, center-creation, etc.)
 - The PI and RDS will Identify need for **3rd-party cost share, voluntary cost share, VCRE contributions, or IDC waivers/reductions**
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5 - 6 weeks before sponsor deadline

- The PI Submit ARF for **standard proposals**
 - The PI will Meet with Research Admin to **discuss timelines, budget, & unique complexities**
 - The PI will provide Admin with initial **budget draft**
 - The PI Provide Admin **subrecipient contact information** & RDS will make initial contact
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4 weeks before sponsor deadline

- **Final day** for a PI to request assistance with **standard proposals** and be **guaranteed assistance** (RDS or PPS)
 - RDS will set up Kuali Record & Sponsor Portal
 - RDS will start building budget in Kuali
 - **The PI will discuss Cost Share & IDC waivers with Department Head/Assoc. Dean of Research**
 - The PI obtains **equipment quotes** & identifies **fabricated equipment**
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3 weeks before sponsor deadline

- PI and RDS will begin confirming budget figures & **RDS start budget justification**
 - The PI will Identify internal **facility fees** & rate sheets
 - The PI will submit **Cost Share & IDC waiver approval forms**
 - RDS will follow up with subcontractors
 - The PI will gather **collaborator/consultant letters**
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10 business days before sponsor deadline

- RDS will review subcontract documents & request revisions
 - RDS will complete sponsor forms & portal fields
 - The PI will complete Kuali Questionnaire
 - The PI/RDS will follow up on approvals
 - **The PI and RDS will finalize budget & justification together**
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7 - 10 business days before sponsor deadline

- The PI will send **FINAL supporting documents** to RDS (e.g. facilities, biosketches, data or mentoring plans, etc.)
 - The PI will send **DRAFT science documents** to RDS (Summary, Narrative, & References Cited)
 - RDS will route **AY cost-share approval forms**
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5 - 7 business days before sponsor deadline

- **RDS will route proposal** to OPAS (final deadline: 5 business days before, 4:00 PM)
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4 business days before sponsor deadline

- **Proposal due to OPAS at 9:00 AM**
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1 business day before sponsor deadline

- The PI is responsible for sending the **final science** to RDS for uploading into Kuali/Sponsor Portal **by 9:00 AM**.
 - **OPAS will aim to submit before 5:00 PM to allow time to address any submission errors**
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Sponsor deadline

- Review and correct any submission errors, then submit the proposal