Fast-Track Your Proposal: OU Submission Essentials

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Office of Research Services

September 10, 2026

Upcoming ORS Training

Navigating the NEH Submission Process

Office of Research Services (ORS)

Event Date: September 17, 2026, 11:00am – 12:00pm

Register here.

ORS Trainings (on Demand and Webinars)

Agenda

- Sponsored Project Overview
- Office of Research Services
- ORS Proposal Policy and Submission Processes
- Information Sheet (InfoSheet)
- Limited Submissions

Sponsored Projects

Extramurally funded research, instruction, service, or scholarly activity binding the University to a defined scope of work or set of objectives that provides a basis for sponsor expectations.

The sponsor could be a state or government agency, private corporation, or non-profit organization.

Sponsored projects that support research or other sponsored activities may be in the form of grants, contracts or cooperative agreements.



ORS Units

- Research Information Services (RIS)
- Proposal Services (PS)
- Award Administration (AA)

We are a pre-award office!

Research Information Services (RIS)

- Distribute funding announcements and agency updates, and manage limited submission competitions

  Email: ors_limitedsubs@ou.edu

  Website: https://www.ou.edu/research-norman/research-services/funding-opportunities/limited-submissions

- Oversee sponsor accounts and portal access information

  https://www.ou.edu/research-norman/research-services/proposal-submission

- Oversee sponsor specific disclosure and training completion

  https://www.ou.edu/research-norman/research-services/training

- Resource for answers to any research/sponsored project questions ris@ou.edu

Proposal Services (PS)



Provide assistance to faculty and staff in the submission of proposals to external funding agencies



Review and interpret sponsor guidelines



Review and provide guidance on developing proposal budgets



Coordinate the internal routing of proposals



Provide assistance with compliance of University, state, and federal regulations



Submit the finished proposal to the sponsor

NOTE: Proposals to external sponsors may NOT be submitted without prior coordination with ORS Proposal Services.

Award Administration (AA)



Negotiates and accepts sponsored awards and agreements on behalf of the University of Oklahoma



Reviews awards for regulatory and sponsor compliance

Ensures adherence to university policies and procedures

NOTE:
Award Administration is the primary contact with the sponsor on all award administrative actions.

Proposals & Awards: Roles and Responsibilities

Principal Investigator (PI)

- Identify funding and initiate proposal process
- Prepare project team, scope, budget, and routing package
- Coordinate proposal submission with ORS
- Respond to sponsor requests during review
- Forward award correspondence and complete compliance requirements
- Manage award performance, reporting, and compliance

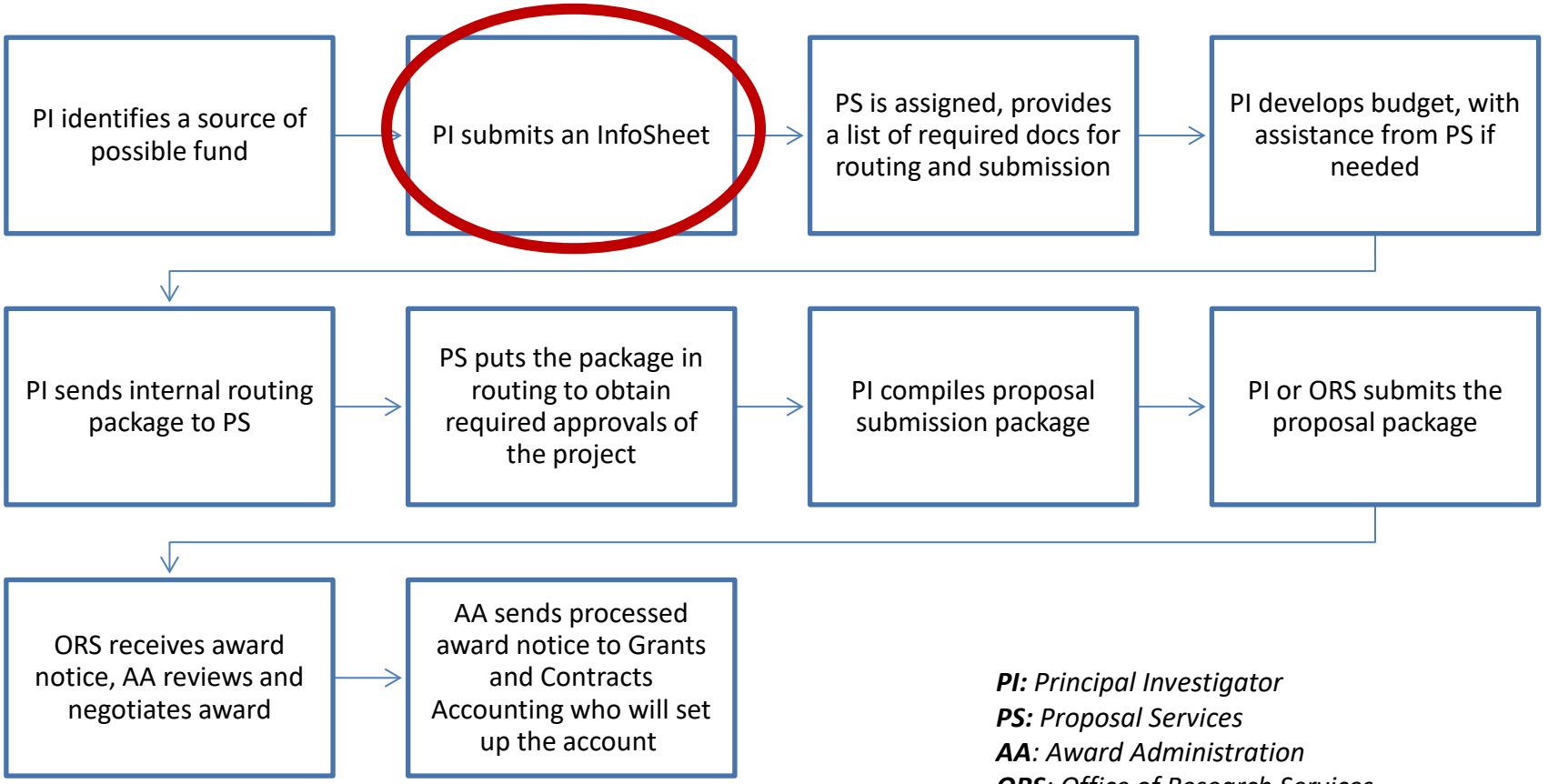
Office of Research Services (ORS)

- Advise on funding opportunities and eligibility
- Assist with sponsor systems and proposal requirements
- Review budgets, routing, and institutional approvals
- Support or perform proposal submission
- Negotiate and accept awards on behalf of OU
- Process modifications and sponsor correspondence throughout the award lifecycle

Proposal development is a collaborative process between investigators, departments, colleges, and ORS to ensure compliance with sponsor and university requirements.

Proposals and Awards Roles and Responsibilities

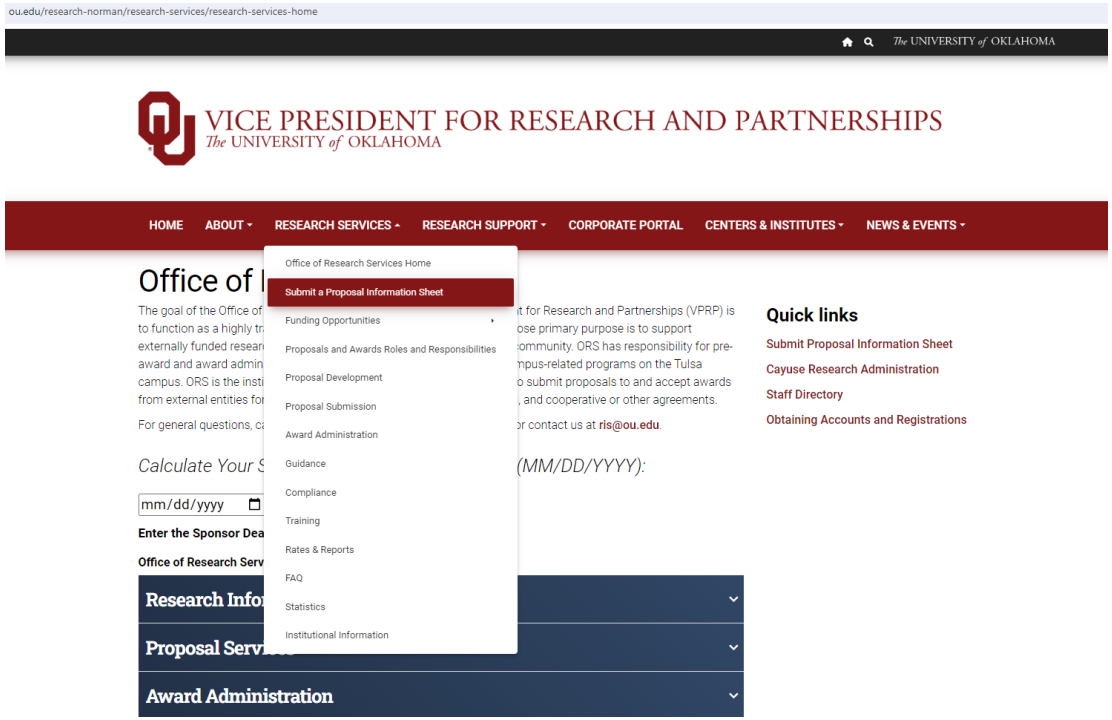
Proposal and Award Process



PI: *Principal Investigator*
PS: *Proposal Services*
AA*: Award Administration*
ORS*: Office of Research Services*

Proposal Information Sheet (InfoSheet)

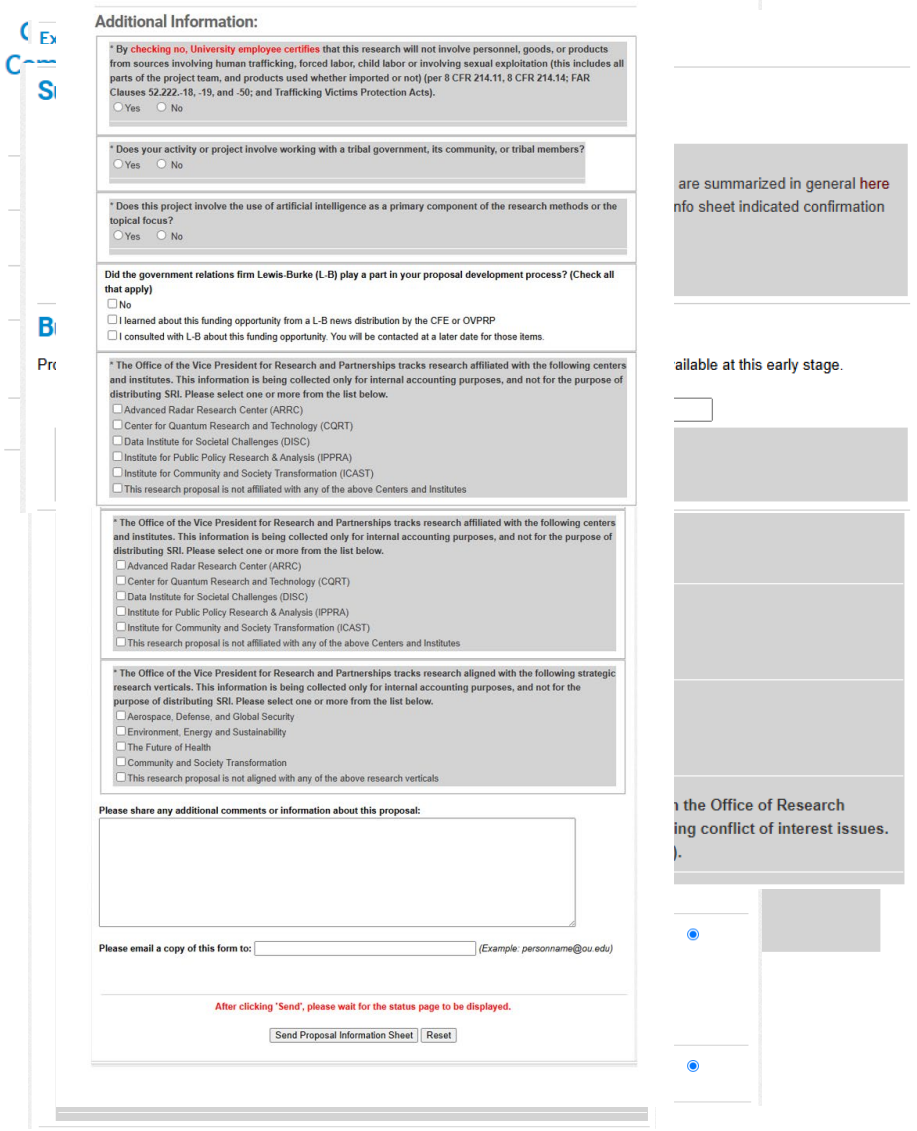
All externally funded project proposals must be routed through the ORS in accordance with University requirements. The InfoSheet is required to initiate the proposal submission process and must be completed before a proposal can be submitted to the sponsor.



https://www.ou.edu/research-norman/research-services/research-services-home

Sections of an InfoSheet

- Proposal Information
- Personnel Information
- PI Contact Information
- Project Information
- Intellectual Property Information
- Conflict of Interest
- Export Regulation Compliance
- Compliance Information
- Subcontract Information
- Budget Information
- Additional Information



Internal Routing Required Documents

Documents required for all internal routing

- Draft Statement of Work (SoW), Summary, or Abstract
- Budget on OU Master Budget Template
- Budget Justification

Additional required documents for some proposals

- If a subcontract is involved, ORS will need a SoW, budget, budget justification, OU subrecipient form completed and signed by an authorized individual from the subcontract organization.
- Other additional internal documents may be required. For example: commitment letters, institutional approval letters, cost share requirements, certifications and others.

Budget and Budget Justification

- Budget
  - What funds do you need to pay for the work you propose to be completed?
  - ORS budget template is required. Some sponsors may require additional budget file formats as outlined in their FOA.

- Budget Justification
  - A written document that describes in detail how the funding will be used.

Budgetary Information



- **Allowable costs**
- **Indirect costs**
- **Cost sharing**
- **Other Institutional commitment requirements**

Budget Preparation training is listed on our ORS website

Routing procedures

Purpose is to receive institutional approvals and project information for submission.

Proposals must be routed through Cayuse, OU's internal routing system, before submitting to the funding agency.

Once the internal signatures are secured (from department, dean, faculty participants), then ORS has legal authority to submit the proposals on behalf of the University.

Limited Submissions

- Some sponsors limit the number of proposals an institution may submit.
- Investigators may not independently submit limited-submission proposals without ORS approval.
- Exceeding limits may result in rejection of all submissions.
- Internal competitions are coordinated by ORS and are mandatory and binding
- Allow additional lead time for internal competitions on limited submissions

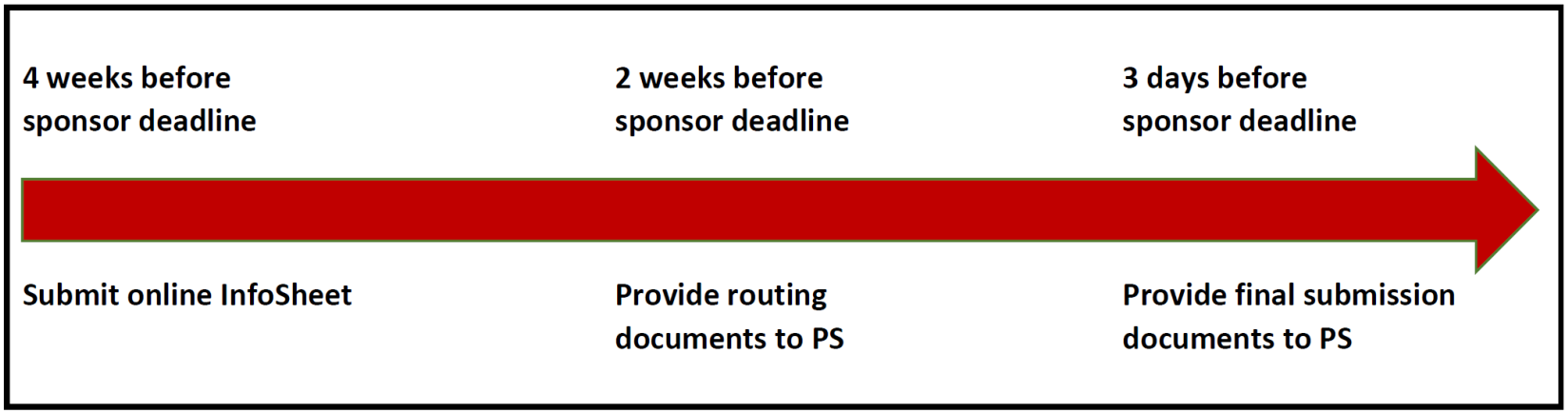


Limited Submissions

What to do when you identify a funding opportunity as a limited submission:

- Check the limited submissions webpage: https://www.ou.edu/research-norman/research-services/funding-opportunities/limited-submissions ORS may have already identified this limited submission. If the funding opportunity is listed on this webpage, click the "Internal Application" link for instructions on applying for the internal competition.
- If the opportunity is not listed on the limited submissions webpage, notify us at ors_limitedsubs@ou.edu.

Proposal Submission Timeline



NOTE: More complex proposals (e.g., those with cost share requirements; those with subcontracts) may require more lead time. Please submit your infosheet earlier in these scenarios.

****The PI and their respective Department or College will assume the responsibility for any rejections due to non-conformity/non-compliance. This includes resolving any financial discrepancies with the budget.***

ORS Submission Policy

ORS submission policy requires all final proposal documents be submitted to ORS **at least three business days** prior to the sponsor submission deadline.

Proposal documents received at least three business days prior to the submission deadline, will be reviewed for compliance.

Proposal documents received *later than* three business days will be submitted without a review or compliance check, to the extent it is possible.

The PI and their respective Department or College will assume the responsibility for any rejections due to non-conformity/non-compliance. This includes resolving any financial discrepancies with the budget.

Submission Details

When preparing a proposal, it's important to carefully review the submission requirements outlined in the FOA.

Proposal Submission Methods

System Requirements

Required Components

- ORS is the Authorized Organizational Representative (AOR)
- PI's generally cannot submit institutional proposals directly

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Key Take-a-Ways

Be aware of general instructions and timing for announcements. If you do need a submission system registration or sponsor account, please contact ORS at ris@ou.edu or visit https://www.ou.edu/research-norman/research-services/proposal-submission

Project a timeline for your submission to keep track of deadlines.

The Office of Research Services is the Authorized Organizational Representative, allowed to submit proposals on behalf of the Board of Regents at the University of Oklahoma

Don't forget to do the InfoSheet early and communicate with your Proposal Services contact regarding any questions

Know your Proposals and Awards Roles and Responsibilities

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Resources

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- **ORS Training Website :** https://www.ou.edu/research-norman/research-services/training
- **ORS FAQs:** https://www.ou.edu/research-norman/research-services/faq
- **Center for Faculty Excellence (CFE);** The Research & Creative Activities Team: https://www.ou.edu/cfe/research
- **ProposalShortTips.pdf**
- **Proposal Development Page**



Contact Information

- **Research Information Services** (ris@ou.edu) can answer general questions or direct you to the appropriate person
- **Sogol Rasouli,** Director of Research Information Services (Sogol.rasouli@ou.edu)
- **Bonnie VanWinkle**, Director of Proposal Services (bvanwinkle@ou.edu)
- **Leslie Flenniken Kelly**, Director of Award Administration (lflenniken@ou.edu)
- **Jennifer O'Hern**, Faculty Relations and Operational Excellence Manager (jennifer.ohern@ou.edu)



CoRA for Frequently Asked Questions and Website Navigation



https://www.ou.edu/research-norman/research-services/research-services-home

Questions

