

Getting Started with ORS: A Guide for New Faculty

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The UNIVERSITY *of* OKLAHOMA
OFFICE OF RESEARCH SERVICES

Outline



ORS mission



ORS roles and responsibilities



Proposal and award process



Internal routing and proposal submission requirements



Resources and additional training opportunities



OFFICE OF RESEARCH SERVICES (ORS)



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OFFICE OF RESEARCH SERVICES

Mission

The **goal** of the Office of Research Services (ORS) under the Office of the Vice President for Research and Partnerships (OVPRP) is to function as a **highly trained, customer service-oriented** organization whose primary purpose is to **support research and sponsored activities** within the University community and to assist faculty in adhering to the federal and local compliance guidelines on the University of Oklahoma – Norman and Tulsa Campuses.



OU Sponsored Research Snapshot (FY26)

- On any given day, OU has 750+ active awards, 275 unique sponsors, and nearly 600 investigators, engaged in sponsored research, instruction, or outreach.
- In Fiscal Year 2026 (July 1, 2025 through June 30, 2026), ORS submitted more than 1,000 proposals, requesting more than \$1.1 billion in funding.



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!



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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)



Responsible for negotiating and accepting all sponsored awards and agreements funded by federal and state agencies, business and industry, and other public and private sources on behalf of the University of Oklahoma



Review awards to ensure compliance with federal and state laws, university and sponsor policies and procedures, and accomplishing the statement of work within the awarded budget

NOTE: An award cannot be completely processed until all steps of proposal submission have been completed.

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



Authority

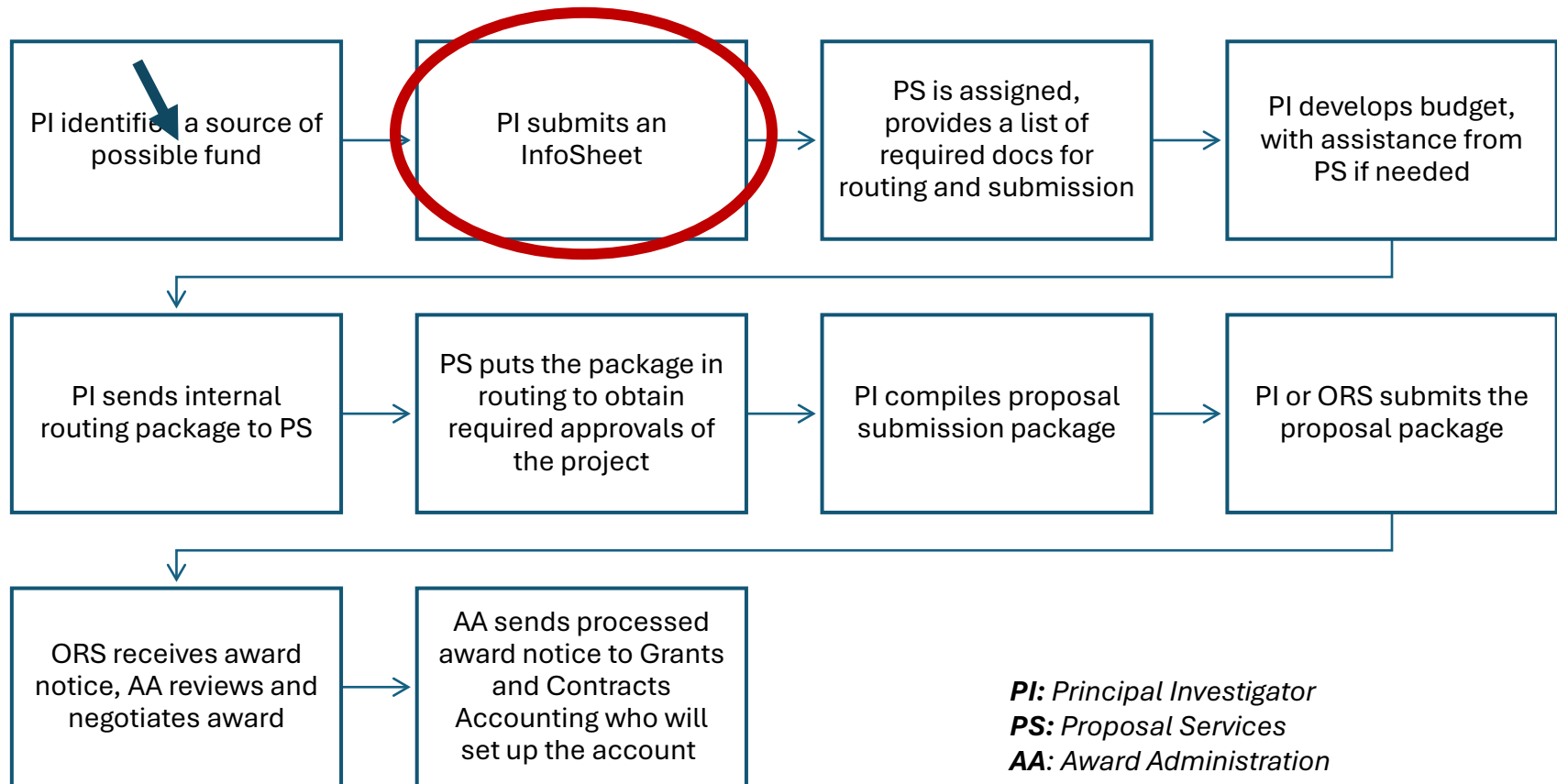
ORS is the institutional unit authorized by the Board of Regents of the University of Oklahoma to submit proposals to and accept awards from external entities for financial support in the form of grants, contracts, and cooperative or other agreements.



PROPOSAL AND AWARD PROCESS



Proposal and Award Process



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

PROPOSAL INFORMATION SHEET (INFOSHEET)



Proposal Information Sheet (InfoSheet)

It is a requirement that all faculty and staff route externally funded projects; the InfoSheet is the first step in the submission process.

The screenshot shows the website for the Office of Research Services at The University of Oklahoma. The URL in the browser is [ou.edu/research-norman/research-services/research-services-home](https://ors.ou.edu/research-services/research-services-home). The page features a dark red header with the university logo and name. A navigation bar below the header contains links: HOME, ABOUT, RESEARCH SERVICES, RESEARCH SUPPORT, CORPORATE PORTAL, CENTERS & INSTITUTES, and NEWS & EVENTS. The main content area is titled 'Office of Research Services' and includes a description of the office's role. A dropdown menu is open under 'RESEARCH SERVICES', listing various options. The 'Submit a Proposal Information Sheet' option is highlighted in red. Other options include Funding Opportunities, Proposals and Awards Roles and Responsibilities, Proposal Development, Proposal Submission, Award Administration, Guidance, Compliance, Training, Rates & Reports, FAQ, Statistics, and Institutional Information. To the right of the dropdown, there is a 'Quick links' section with links to 'Submit Proposal Information Sheet', 'Cayuse Research Administration', 'Staff Directory', and 'Obtaining Accounts and Registrations'. At the bottom of the page, there are three dark blue buttons: 'Research Information', 'Proposal Services', and 'Award Administration', each with a downward arrow.

<https://ors.ou.edu/proposal/infosheet/infotype/prod-userlogin.asp>

Why do I have to fill out an InfoSheet?



The information sheet allows for the assignment of the Proposal Administrator/Coordinator in ORS to assist the PI throughout the proposal submission process.



It adds the proposal to our calendar, starts guideline and submission system research, and prioritizes the handling of the proposal.



Funding agency guidelines, project period, budget information, etc. will be needed for the creation of the proposal routing forms.



Submission of the Information Sheet results in the first review by other OU offices (e.g., Office of Technology and Commercialization for any patent or other intellectual property issues and, Export Controls, etc.)



When to submit an InfoSheet?



Any time external funds are being requested or sponsored work is being proposed. This includes submission of:

- Full Proposals
- Preliminary proposals
- White papers
- Concept papers
- Letters of Intent
- Fellowships

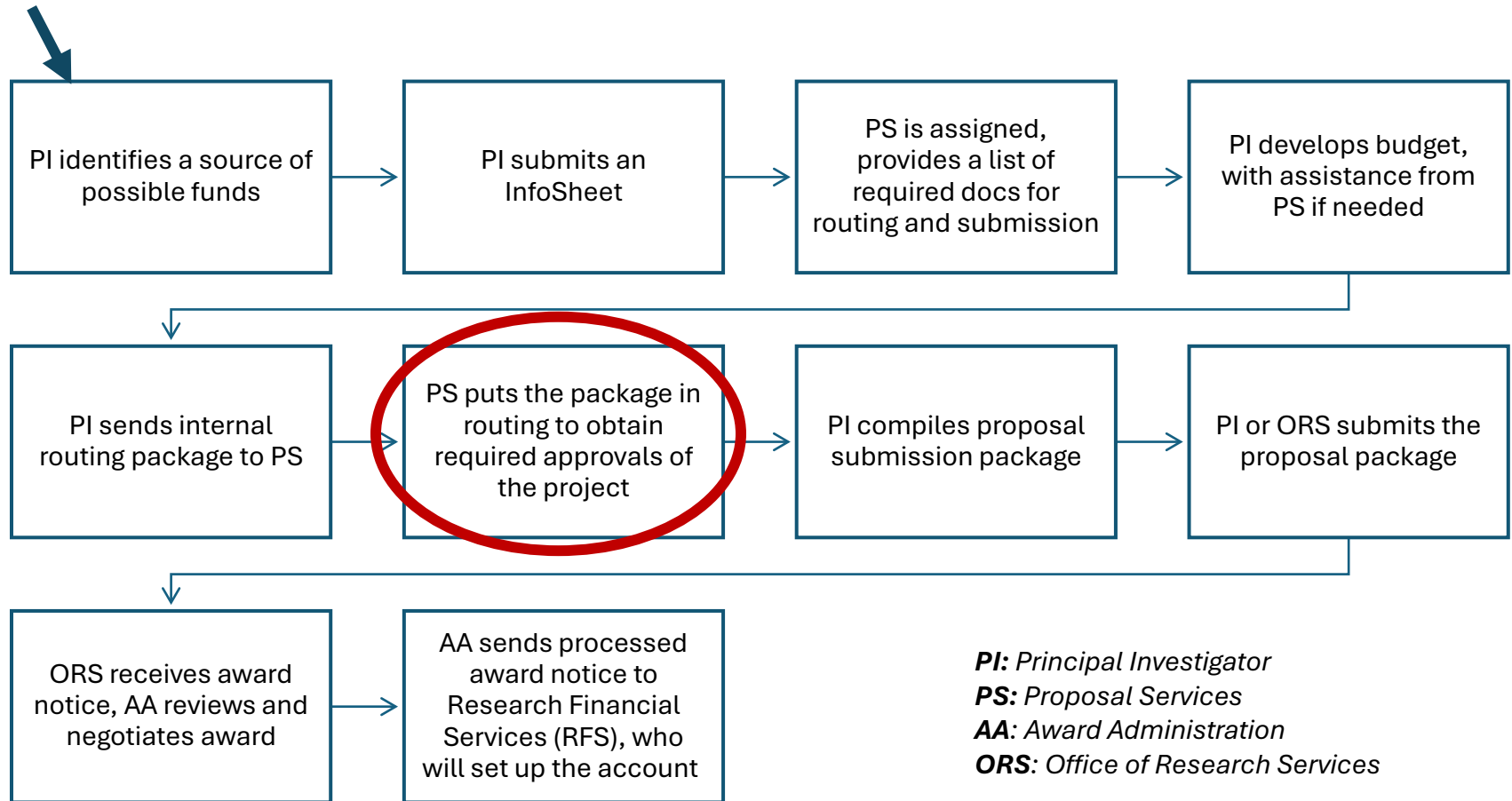


INTERNAL ROUTING AND SUBMISSION REQUIREMENTS



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Proposal and Award Process



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
- *Other specific documents as requested from the Sponsor

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.



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Routing procedures

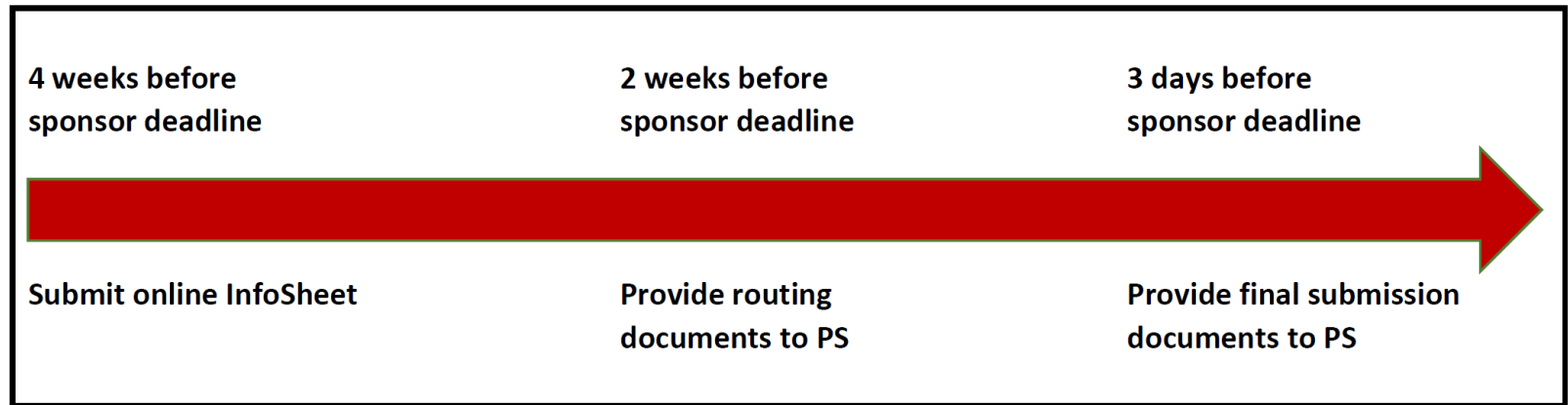
Purpose is to receive institutional approvals and project information for submission.

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.



General Proposal Timeline



NOTE: More complex proposals (e.g., those with cost share requirements; those with subcontracts) may require more lead time.

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.

*****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.***



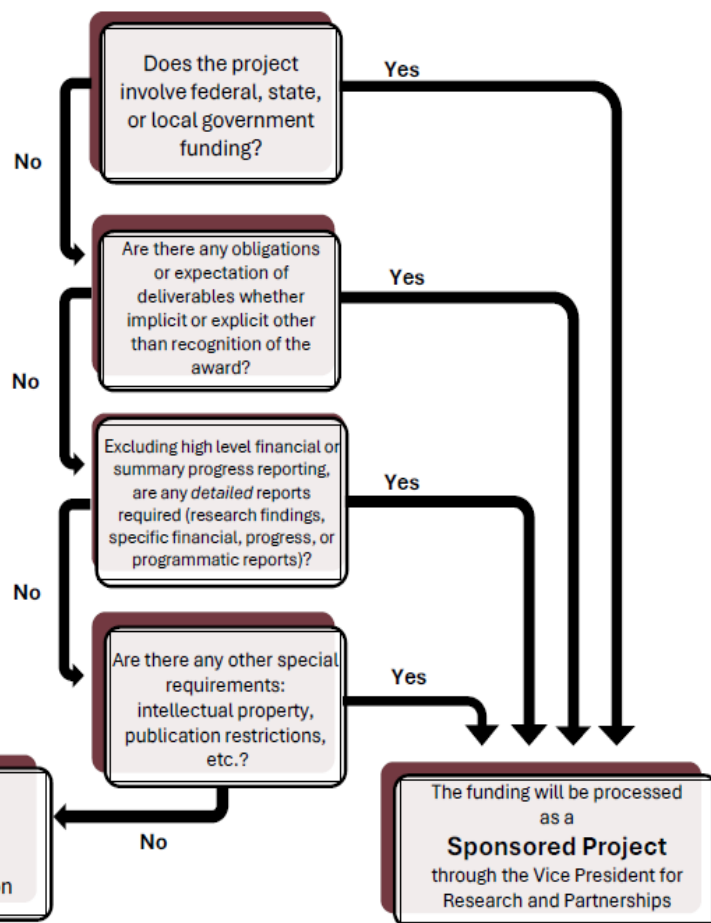


Training Requirements

- The Sponsored Research and Compliance Training
 - Covers eight research-related compliance topics and is required for all faculty and staff involved in sponsored research ([OnPoint](#))
 - Required every 4 years
- CITI Financial Conflict of Interest (FCOI) Training
 - Mandatory for PHS/DOE awardees prior to expenditure of funds
 - Required every 4 years
- NSF Responsible Conduct of Research (RCR) Training Requirements
 - Students and postdoctoral researchers funded by NSF grants are required to complete online CITI training
- NIH Other Support Training Requirement
 - Institutions must provide training on disclosure of Other Support. (Policy Notice: NOT-OD-25-133)
 - All senior/key personnel must complete this [Other Support] training prior to proposal submission per ORS policy.
 - Training available through OU's Navex Disclosure Management System.
- [Additional Agency and Other On-Demand Trainings](#)



GIFTS vs SPONSORED PROJECTS



	Gift Indicators	Sponsored Project Indicators
Purpose	A donation that may or may not specify an area of interest	The sponsor details how the funds should be used as documented in the agreement of award
Reporting	High-level financial and summary progress reporting (no detailed financial reporting)	The sponsor may require specific deliverables, research findings, progress, financial, or programmatic reporting
F&A or IDC	There are no facilities and administrative or indirect costs associated	Facilities and Administrative or Indirect costs may be applied as defined in the identified rate and terms and conditions

NOTE: The University of Oklahoma is a nonprofit, state agency exempt under section 115(a). Some agencies accept this as a 501(c)(3) equivalent even when guidelines stipulate 501(c)(3) requirements. Exceptions exist with final determinations being made by ORS/OUF leadership. Some grants require submission through OUF which will be processed through ORS.

Resources

- **ORS Website:** <https://www.ou.edu/research-norman/research-services/>
- **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**



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Contact Information

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



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CoRA for Frequently Asked Questions and Website Navigation



VICE PRESIDENT FOR RESEARCH AND PARTNERSHIPS
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Office of Research Services

Federal Grant and Assistance Directives FAQ Now Available

In a recent **communication**, President Harroz acknowledged questions and concerns raised by recent federal executive orders and Executive Branch communications related to federal assistance and grants essential to the university's research enterprise. **Additional information is now available online** and will be updated as needed.

The goal of the Office of Research Services (ORS) under the Vice President for Research and Partnerships (VPRP) is to function as a highly trained, customer service-oriented organization whose primary purpose is to support externally funded research and sponsored activities within the university community. ORS has responsibility for pre-award and award administration on the Norman campus and Norman campus-related programs on the Tulsa campus. ORS is the institutional unit authorized by the Board of Regents to submit proposals to and accept awards from external entities for financial support in the form of grants, contracts, and cooperative or other agreements.

For general questions, call the ORS main phone number, (405) 325-4757, or contact us at ris@ou.edu.

Calculate Your Submission Processing Timeline(MM/DD/YYYY):

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

Quick links

[Submit Proposal Information Sheet](#)

[Cayuse Research Administration](#)

[Staff Directory](#)

[Obtaining Accounts and Registrations](#)



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Questions

