SUNY Potsdam Proposal Process

All proposal requests are sent to Aimee Coates at aimee.coates@rfsuny.org with a cc to Jack McGuire at mcguirjp@potsdam.edu.

Step 1: Submit Proposal Request via email at least 20 business days before sponsor deadline.

a. The request must include a link to the RFP/solicitation, along with the submission deadline date.

After submitting the request, you'll receive an email within three business days with the following information:

- A suggested timeline for preparing various documents.
- A timeline for Aimee to receive certain documents.
- A request to initiate the proposal application online and share with Aimee.
- If applicable, a request to complete the following:
  - Conflict of Interest Disclosure.
  - CITI Training – 2 modules are required.
  - Department chair approval for any special circumstances (such as course release, space requests, etc.).
- If applicable, a request to obtain the following additional approvals:
  - Department chair approval for any special circumstances (such as course release, space requests, etc.).
  - Institutional approvals (IRB, IACUC, etc.). ***Note:*** Approvals are required to accept an award and start a project.
  - Required campus approvals for any projects that involve biological, chemical, radiological substances or equipment, or any hazardous materials or substances.

Step 2: Design project & prepare proposal documents

a. If applicable, register for the sponsor's submission portal. For example: NIH Registration, or NSF Account Registration & Management.

b. **Principal Investigators (PIs) must initiate all proposal applications on the sponsor's online portal, and alert Aimee once created. PIs are also required to update the application with required programmatic documents.**

c. Identify internal and external collaborators. Complete a [Subrecipient Commitment Form](#) (form will be provided by Aimee) for any external collaborators. Provide Aimee with the contact information of your internal and external collaborators.

d. Draft your budget and budget justification — including personnel, fringe rates, SUNY Potsdam's [Facilities & Administrative (F&A) Rates](#), supplies, equipment, travel, cost-sharing, etc. Ask Aimee or Jack for assistance if you are unsure of expenses.

e. Use the Corporate Fact Sheet section to complete required elements.

f. Complete one biosketch for each senior personnel, following the sponsor's formatting guidelines. Use the SciENcv tool for this step.

g. Complete one Other Support document for each senior personnel, following the sponsor's formatting guidelines. Use the SciENcv tool for this step.

h. Complete project-related documents as required by the sponsor. For example, many sponsors require a Project Summary, Project Description, Facilities & Resources, etc.

i. Complete all applicable research and regulatory compliance steps, obtain department chair approval, other required campus approvals as requested in the initial email response from Aimee.

Step 3: Submit final proposal documents for Pre-award Review at least 10 business days before sponsor deadline

a. Email the following documents to Aimee at least 10 business days **before** the sponsor's submission deadline:

- Final Budget and Budget Justification, including outside collaborators.
- Final Project Description (narrative, research strategy, etc.)

Aimee will forward these documents to Jack McGuire for RF approval, and so he can obtain any necessary campus approvals.

Step 4: Submit the Proposal to the Sponsor

a. Aimee and Principal Investigator will work together to ensure the proposal has been properly uploaded to the sponsor's submission portal.

b. Principal Investigator is responsible for a final review of all programmatic documents (except budget and budget justification) and uploading the final versions to submission portal (i.e. grants.gov, eracommons, etc.)

Aimee will:
- Upload finalized budget and budget justification to application.
- Review entire application to confirm if any pieces are missing.
- As Authorized Organization Representative (AOR), will submit the proposal.
- Forward copy of completed application and relevant documents to Michelle Moulton to ensure proposal is uploaded to the RF proposal system PACS.

If at any time you have questions about what to do, contact Aimee Coates at aimee.coates@rfsuny.org, Jack McGuire at mcguirjp@potsdam.edu, or Michelle Moulton at moultoml@potsdam.edu.