


What are RMS' Services in the 2015 Service Partnership Agreement?



Items marked with the orange change icon to the left signify key changes in the [2015 Service Partnership Agreement](#).

Proposal development and submission

- Provide a timeline/checklist of internal and external proposal requirements based on funding opportunity.
- Assist with specific proposal documents, including administrative sections and the budget.
- Compile, format, and review all required proposal items and prepare for submission to sponsor.
- Notify PI of any issues requiring attention.
- Route proposal items for signature approval by Chair or Chair's delegate and institutional signature authority.
- Submit final proposals to sponsor on PI's behalf.
-  • Provide updates on pending Other Support section after proposals are submitted to stakeholders.

Budget Procedures

- Develop budget and budget justification, verifying with the PI and Post-Award Analyst as necessary.

Award Triage, Intake and Negotiation



- RMS Triage Team receives RMS award matters and assigns to the RSC and PI.



- RSC reviews award documents for accuracy, compliance, and problematic terms & conditions.



- For awards requiring negotiation, an RMS Award Specialist will request changes to terms & conditions in order to ensure terms are acceptable to all parties involved.

Subcontracts Out

Additional detail to follow pending the outcome of the Business Process Improvement project underway as of August 2015.

Sponsor Communications and Correspondence



- Format information provided by Post-Award Analysts and/or PI into Sponsor-specific formats, compile documents required for requests (i.e. JIT, NCEs, carry-forward) and route for institutional and sponsor approvals.

Progress Reports

- Lead the administrative reporting submission process and obtain Other Support and financial report, as needed, from departmental Post-Award Analyst.

Award Advance



- Verify award advance compliance with all applicable regulations and forward to CGA on the PI's behalf.

Resource for Proposal and Award Expertise


- Respond to requests for information within 24 hours unless stated otherwise in the Service Partnership Agreement (SPA).
- Connect the PI or department to other units as necessary (e.g. ICD, GBC, CTBSC) and direct complex award matters to an RMS Award Specialist.
- Regularly scheduled check-ins with RSC and PI, department manager(s) and/or Post-Award Analyst(s) are encouraged.

What are the PI and Department's responsibilities in the 2015 Service Partnership Agreement?






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PI

- Notify RSC and Department Manager of Intent to submit a proposal within the timeframe outlined in the Service Partnership Agreement (SPA).
- Submit Letter of Intent directly to sponsor if institutional signature, detailed budget or commitment of resources, and/or sponsor's terms & conditions are not required.
- Provide proposal information and documents as requested by timeline of due dates.
- Obtain approvals from IRB and/or IACUC and complete COI disclosures as necessary.
- Update and provide content for proposal items such as biosketches, Other Support forms, and Letters of Support.
- Prepare all research and/or program plan components of proposals and progress reports.
- Provide financial and staffing information for budget development and/or award advance purposes.
- Provide justification for NCEs, re-budgeting and carry-forward requests, etc.
- Review final draft of proposal before it is submitted to Sponsor
- Review award notification terms, conditions, and budget.
-  • Request PubMed Central Identifiers (PMcIDs) and maintain compliant publications as appropriate.

Department

- Ensure space and resources are available for research.
- Inform RSC of PIs' Intent to Submit Proposals in a timely manner per the Service Partnership Agreement, as necessary.
- Approve PI Status Waiver (if needed).
- Provide proposal budget input as requested, e.g., cost sharing, commitments, and salary information.
- Approve proposals (Chair or Chair's delegate).
- All post-award activities (i.e. fund closeout activities, notify PI and RSC if NCE is needed, create spending plans).
- Review award notification terms, conditions, and budget.
- Submit financial reports to sponsor (in collaboration with RSC as needed).
- Provide information for all personnel effort and/or all other effort reporting for personnel within the department.
- Complete and format T32 tables and other project-specific tables and lists required by the Sponsor.
-  • Post-Award Analyst maintains the Other Support page including the PI effort calculation and overlap statement, utilizing the pending section provided by the RSC at time of proposal submission.
-  • Complete award advance form and submit to RSC (as appropriate).
-  • Notify RSC of upcoming scientific and other progress report due dates on behalf of the PI.

Learn more about RMS services at <http://osr.ucsf.edu/content/research-management-services>.