




TEXAS A&M SPONSORED RESEARCH SERVICES

CPI
May 8, 2024


Kristi Billinger Associate Vice President Executive Director	Crissy Stratta Associate Executive Director	Julie Bishop Associate Executive Director	Dr. Jim Joyce Associate Executive Director
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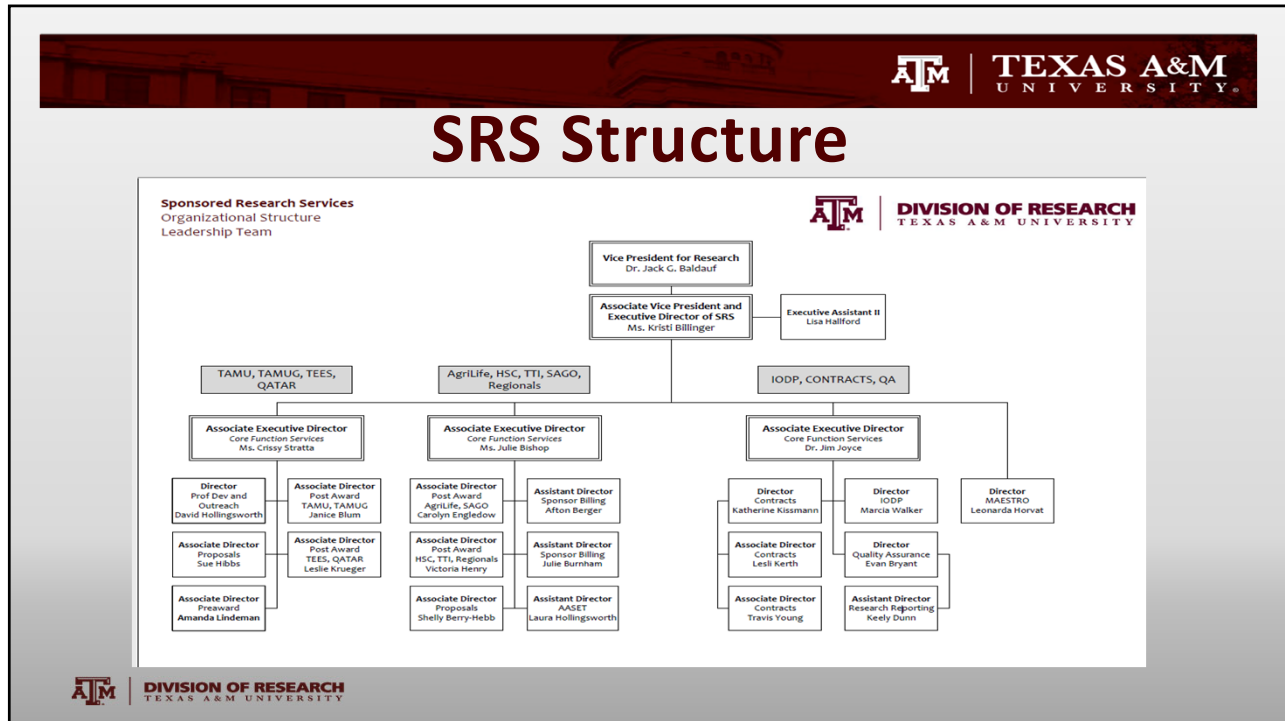


Overview

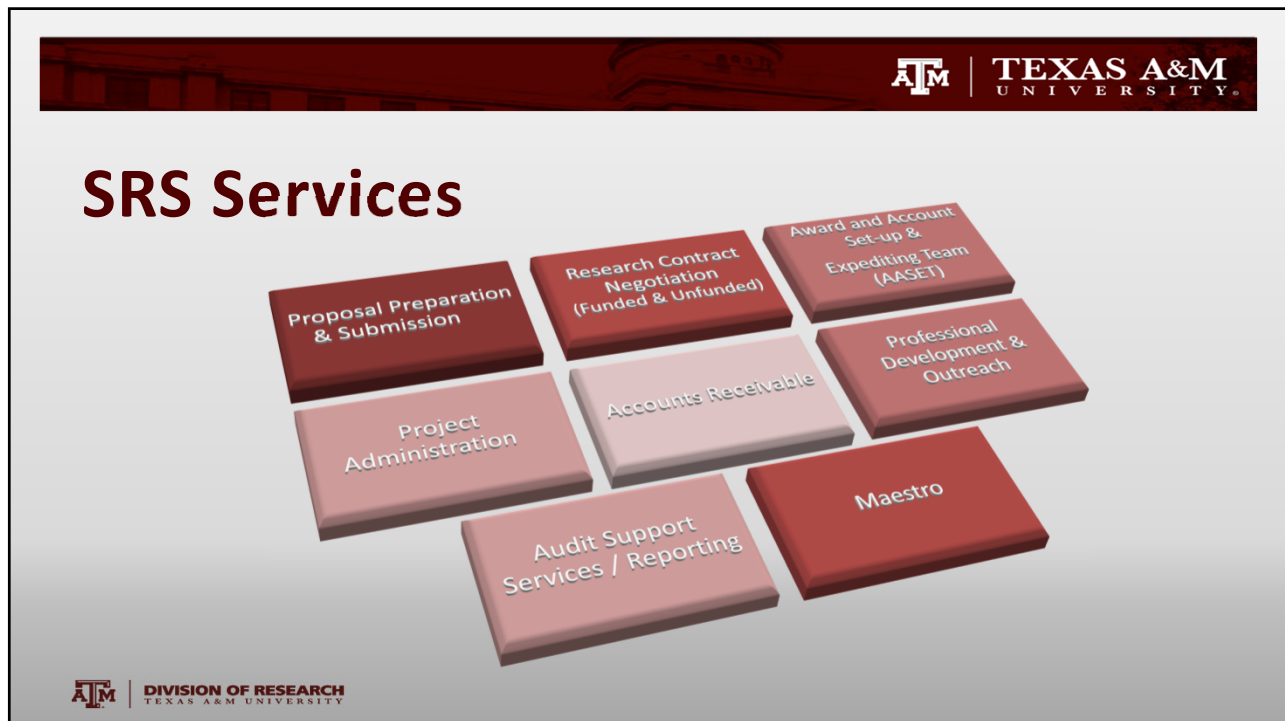
- **SRS Overview**
 - **Reporting Structure**
 - **Services**
- **Metrics update**
- **CPI Survey**
- **Questions**




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Proposal Metrics

TOTAL NUMBER OF PROPOSALS SUBMITTED FY20–24

FY2020	FY2021	FY2022	FY2023	FY2024 (As of March 2024)	GRAND TOTAL
5,117	5,088	4,727	5,232	3,441	23,605




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SRS Submitted Proposals by Member FY 23–Current

Member.	FY2023												FY2023 Total	FY2024												FY2024 Total
	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug		Sep	Oct	Nov	Dec	Jan	Feb	Mar						
AL-EXT	29	25	20	21	18	16	20	27	27	20	20	16	259	28	34	22	12	29	11	21	157					
AL-RSRCH	139	95	90	51	77	87	85	66	86	105	80	144	1,105	132	129	75	63	73	91	80	643					
PVAMU														22	51	21	19	24	28	18	183					
SAGO		1	1		1				1	1			5								1					
SHARED-SRV	1												1								1					
TAMHSC	41	57	39	32	37	45	45	34	38	70	42	41	521	55	60	46	39	36	65	41	342					
TAMSS					1		2					3	7	1	4	3		7	2	1	18					
TAMU	93	97	94	57	104	102	93	73	80	71	75	85	1,024	121	89	121	57	137	108	95	728					
TAMUCC	29	32	38	16	20	32	25	27	32	30	14	29	324	30	30	33	28	23	24	35	203					
TAMUCT			1			1			2	1			5	4	2	1	2	2		1	12					
TAMUG	10	6	13	4	8	5	15	10	14	14	8	16	123	5	9	4	6	6	8	12	50					
TAMUSA	4	5	3	2	6	5	5	3	5	5	6	7	56	11	7	7	1	4	5	5	40					
TARLETON	8	5	3	4	2	2		7	2	5	2	1	41	1	2	1		1		2	7					
TEES	105	110	84	98	110	108	160	94	124	164	107	116	1,380	135	135	114	107	110	138	128	867					
TTI	32	20	25	29	39	27	39	25	28	30	28	45	367	17	24	19	18	30	25	34	167					
TVMDL									3				3		1					1	1					
WTAMU								1		2	2	4	9	4	8	4	2	3	2		23					
Grand Total	491	453	411	314	423	430	489	368	442	517	387	505	5,230	566	585	471	354	485	507	473	3,441					



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CPI Survey

Proposal Submission Guidelines


Section 4.3. I am familiar with the Proposal Submission Guidelines for submitting proposals. 296

Section 4.3. I am familiar with the Proposal Submission Guidelines for subm...	Strongly Disagree	Disagree	Somewhat Disagree	Not Applicable	Somewhat Agree	Agree	Strongly Agree
No Name	1	12	13	0	68	136	66

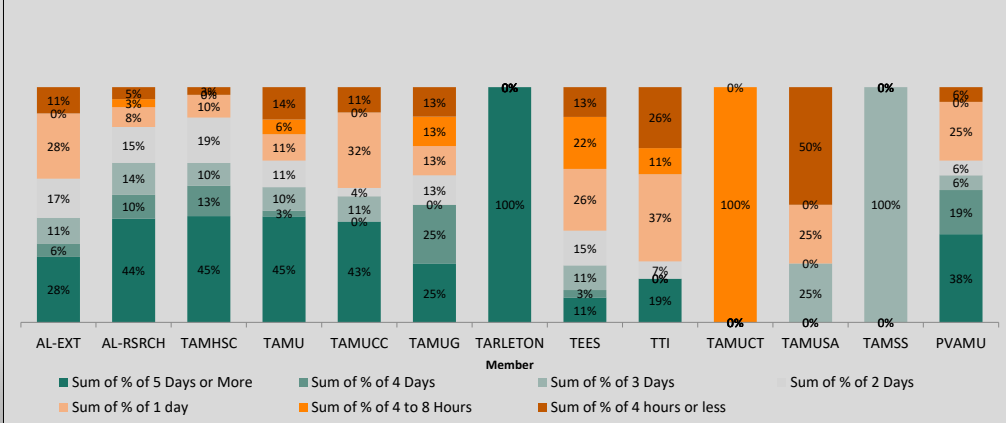
Please find the SRS Proposal Submission Guidelines on our website at:
[Submission Guidelines – Sponsored Research Services \(tamu.edu\)](https://www.tamu.edu/srs/submission-guidelines)



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Proposal Lead Times by Member March 2024




Member	Sum of % of 5 Days or More	Sum of % of 4 Days	Sum of % of 3 Days	Sum of % of 2 Days	Sum of % of 1 day	Sum of % of 4 to 8 Hours or less
AL-EXT	28%	6%	11%	17%	28%	0%
AL-RSRCH	44%	10%	14%	15%	8%	3%
TAMHSC	45%	13%	10%	19%	6%	1%
TAMU	45%	3%	10%	11%	6%	14%
TAMUCC	43%	0%	11%	4%	32%	11%
TAMUG	25%	0%	13%	13%	13%	13%
TARLETON	100%	0%	0%	0%	0%	0%
TEES	11%	3%	11%	15%	26%	22%
TTI	19%	0%	7%	37%	11%	26%
TAMUCT	0%	0%	100%	0%	0%	0%
TAMUSA	0%	25%	0%	25%	0%	50%
TAMSS	0%	100%	0%	0%	0%	0%
PVAMU	38%	19%	6%	6%	25%	6%

*Count is based on when administrative documents are received by SRS




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Pre-Award/Proposals IMPACT

- *Submitting proposals to SRS with appropriate lead time to prepare administrative portions of the proposal is required to ensure a proposal is compliant with sponsor specific guidelines, System Member Rules and Policy, and meet sponsor deadlines. Proposals that do not meet sponsor required criteria are typically rejected without review.*
- *SRS's goal is to reduce administrative burden at proposal stage, this may encourage Investigators to submit more proposals. With the appropriate lead time, proposal administrators will assist in preparing the most compliant package by the sponsor deadline.*
- *The top 20 NSF HERD ranked institutions all have proposal submission deadlines.*
- *SRS offers a unique Quality Control Check of proposals during the preparation stage to ensure all administrative components are accurate and meet sponsor requirements and RFP guidelines, if submitted with appropriate lead time.*
- *SRS has some of the most knowledgeable research administrators in TAMUS. In collaborative efforts with stakeholders, SRS has been successful in submitting large multi-disciplinary, multi-entity, high impact proposals, which further encourages researchers to seek proposal opportunities. If funded, this will grow the research enterprise and further elevate the reputation of Texas A&M University as a Tier 1 research institution.*



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Award and Account Set Up Expediting Team AASET

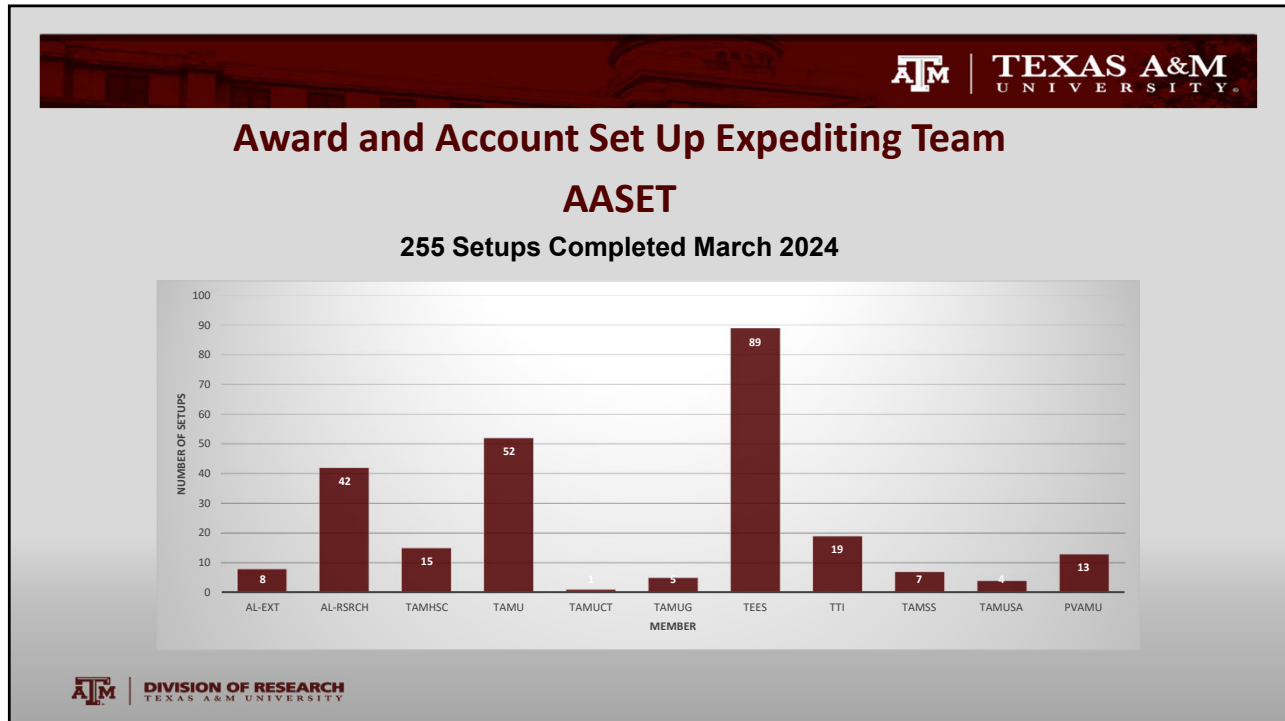
5,443 Setups Completed FY23-24

Member.	FY2023												FY2024							FY2024 Total	
	Total												Total								
	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar		
AL-EXT	20	26	14	14	28	18	18	30	16	24	23	18	249	15	18	7	13	15	20	8	96
AL-RSRCH	76	70	37	35	51	44	78	66	91	51	69	75	743	64	78	49	34	60	61	42	388
SAGO	28		4	3			1		1			1	38	1					2		3
SHARED-SRV	51												51								
TAMHSC	30	20	16	11	18	27	35	27	34	22	25	34	299	31	25	29	13	24	33	15	170
TAMRF			1	1				1					3	1	4	1		3	1		10
TAMU	87	51	51	41	40	47	59	45	79	70	60	94	724	92	65	42	46	52	52	41	441
TAMUCT									1	1	1		2		1	1		2	1	5	3
TAMUG	7	2	2	1	2	4	1	7	5	6	7	2	46	5	2	6	7	4	4	5	33
TARLETON	1									1			2					1			1
TEES	76	73	47	44	86	83	49	77	75	52	83	95	840	66	78	59	59	103	75	89	529
TTI	23	19	25	13	20	19	18	18	25	13	19	23	235	22	14	20	19	21	31	19	146
TVMDL			2				1		1	2			6		1	1		1			3
TAMSS		13	8	12	6	13	3	8	11	9	6	24	113	32	15	6	4	8	9	7	81
TAMUSA			2	2	3	1	5	3	4	2	1	6	29	11	4	1	1	2	2	4	25
PVAMU														40	21	29	13	11	5	13	132
Grand Total	399	274	209	177	254	256	268	282	342	253	294	372	3,380	380	353	274	205	297	299	255	2,063

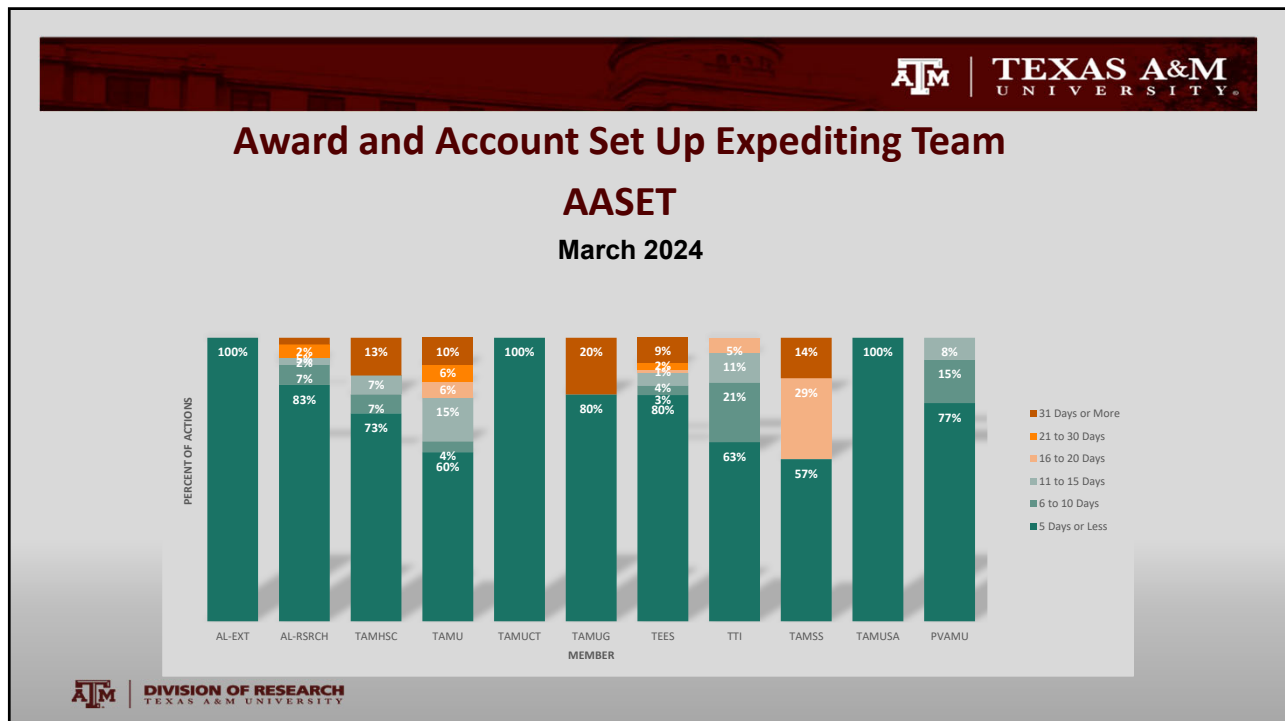


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Contract Metrics

TOTAL NUMBER OF NEGOTIATED CONTRACTS FY 20-24

FY20	FY21	FY22	FY23	As of March FY24	Grand Total
2,826	3,672	3,915	3,950	2,390	16,741




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Contract Metrics

MONTHLY CONTRACT NEGOTIATIONS BY MONTH AND BY MEMBER FY23-24

Member	FY2023												FY2023 Total	FY2024						FY2024 Total	
	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug		Sep	Oct	Nov	Dec	Jan	Feb		Mar
	AL-EXT	29	10	9	10	21	24	21	20	17	16	24		19	220	36	26	18	16		14
AL-RSRCH	108	43	38	52	70	69	82	82	67	82	63	99	855	95	73	53	50	47	87	58	463
PVAMU														3	32	9	11	22	10	25	112
SAGO	1				1								7	9	1						4
SHARED-SRV	5												5								
TAMHSC	48	52	29	31	34	30	44	40	46	43	50	54	501	40	53	39	28	32	36	45	273
TAMRF		1			1			1				4	7		1		1	1			3
TAMSS			3	3	1	7	7	2	3	3	3	13	46	11	8	5	1	3	9	9	46
TAMU	98	84	69	69	75	76	94	76	104	89	83	110	1,027	115	101	90	58	85	82	94	625
TAMUCT									1		1		2	2	1					2	5
TAMUG	10	6	1	2	7	2	11	8	5	11	6	10	79	7	5	8	6	7	10	8	51
TAMUS															2						2
TAMUSA					1	6	2	2	1	5	1	4	24	3	3	1	2	3	2	3	17
TARLETON		1		1					2			2	7								2
TEES	77	61	68	46	83	105	82	70	69	57	66	77	861	61	80	54	63	93	65	70	486
TTI	28	18	33	27	22	23	27	23	22	15	28	31	297	28	14	22	23	19	43	11	160
TVMDL			3		1	1				2			3	10							4
Grand Total	404	280	250	243	317	343	371	324	337	323	325	433	3,950	406	401	299	259	326	357	342	2,390




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Contract Negotiation IMPACT

- *SRS ensures the outcome of negotiation provides the most favorable terms and conditions to benefit the member and reduce risk.*
- *Due to more stringent and complex compliance issues at the federal level contract negotiation has become more administratively burdensome and time consuming. Additional reviews and approvals are often necessary due to more federally imposed laws and regulations.*
- *SRS makes every effort to ensure consistency of terms to provide flexibility of the research.*
- *Proper contract negotiation sets the stage for the entire life cycle of the award.*
- *Successful negotiation of an award translates to successful administration of the award and ensures project compliance, proper payment terms, deliverables met, and proper close-out.*

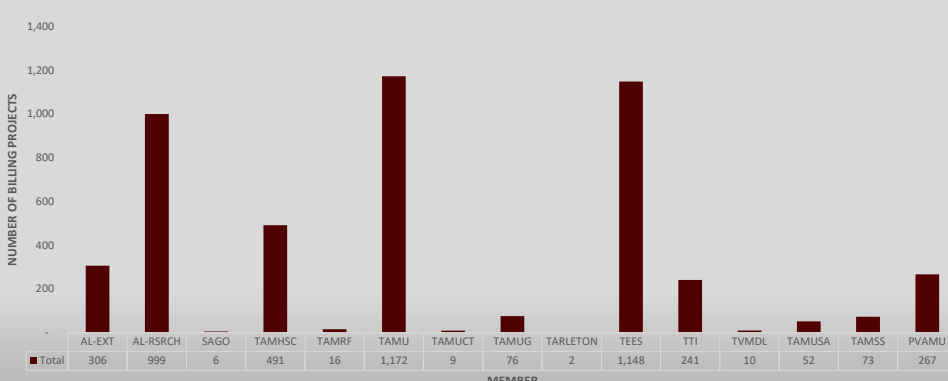


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Projects Managed Metrics


**4,868 ACTIVE PROJECTS
AS OF 3/31/2024**



MEMBER	NUMBER OF BILLING PROJECTS
AL-EXT	306
AL-RSRCH	999
SAGO	6
TAMHSC	491
TAMRF	16
TAMU	1,172
TAMUCT	9
TAMUG	76
TARLETON	2
TEES	1,148
TTI	241
TVMDL	10
TAMUSA	52
TAMSS	73
PVAMU	267
Total	4,868




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Project Administration IMPACT

- *SRS helps to facilitate research through guidance and oversight ensuring the appropriate monitoring of all compliances.*
- *SRS reviews and approves project expenditures for allowability, allocability, and reasonableness.*
- *SRS ensures proper monitoring of integrity checks that cover a multitude of project responsibilities.*
- *SRS ensures monitoring of technical and financial deliverables.*

SRS makes every effort to ensure the project is compliant with all sponsor regulations, System Member rules, and policies which lowers the risk of audit findings and further elevates our reputation as a Tier 1 research institution



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CPI Survey Employee Retention


Retention Efforts

- To compete with other institutions, offered hybrid work arrangement
- Market study to offer competitive salaries


Results of efforts

SRS FY23 turnover was ~5.15%

TAMU FY23 turnover was ~11.42%




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SRS Communication/Resources

- Dedicated Director of Professional Development and Outreach Initiatives - David Hollingsworth
- CPI Newsletter
- List Serv (PI and Departmental)
- Robust Website - [Sponsored Research Services \(tamu.edu\)](https://srs.tamu.edu)



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SRS Communication/Resources

SRS website: <https://srs.tamu.edu>

Resources
SRS Updates
SRS PI Guidebook
AnSRS4U Express
AnSRS4U
CRA Review
Cayuse Proposals (S2S)
SRS Forms
Frequently Asked Questions
Guidance for Application of F&A Dated 09/02/22
Quick Links



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Contract Negotiations

Responsibilities of Contracting Offices

<u>SRS</u>	<u>AgriLife</u>	<u>TEES</u>	<u>TTI</u>
<ul style="list-style-type: none"> All funded & unfunded for TAMU, HSC, TAMUG & TAMUQ All funded from Federal, State and non-profit sponsors Industry for TAMU, TAMUG, HSC & TTI 	<ul style="list-style-type: none"> AgriLife Commodities AgriLife Industry AgriLife's Unfunded - Research Related 	<ul style="list-style-type: none"> TEES Industry TEES Unfunded - Research Related 	<ul style="list-style-type: none"> TTI TXDot TTI Unfunded



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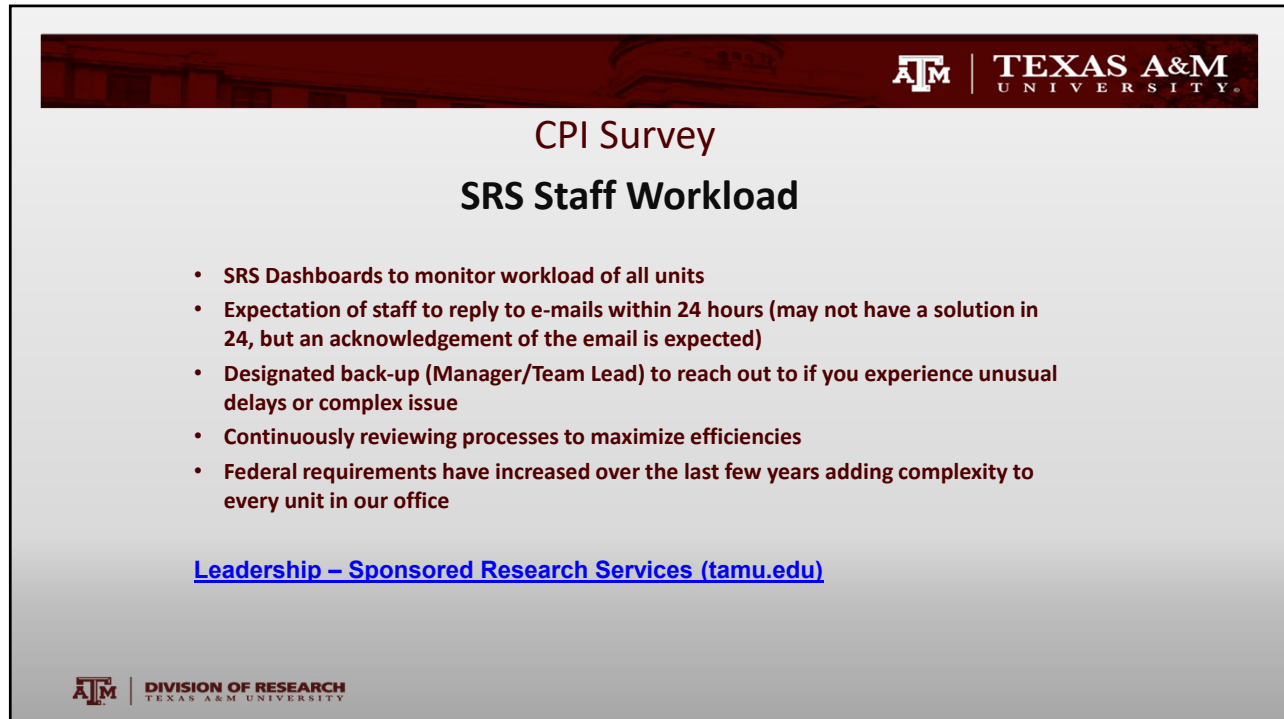
Contract Negotiations


Interim Funding is bridge funding used to set up an account so the PI has access to a limited amount of funds prior to the completion of contract negotiations and signature(s). Interim funding is available for new awards and continuations if the following conditions are met:

- The Sponsor is Federal, State, or Federal Flow through (interim funding can be considered if a sponsor is private or non-profit, but this is determined on a case by case basis)
- If all compliance items have been met (IRB/IACUC/Export/FCOI/etc.)
- The award has a firm start date or allows for pre award expenditures
- A proposal has been routed and approved



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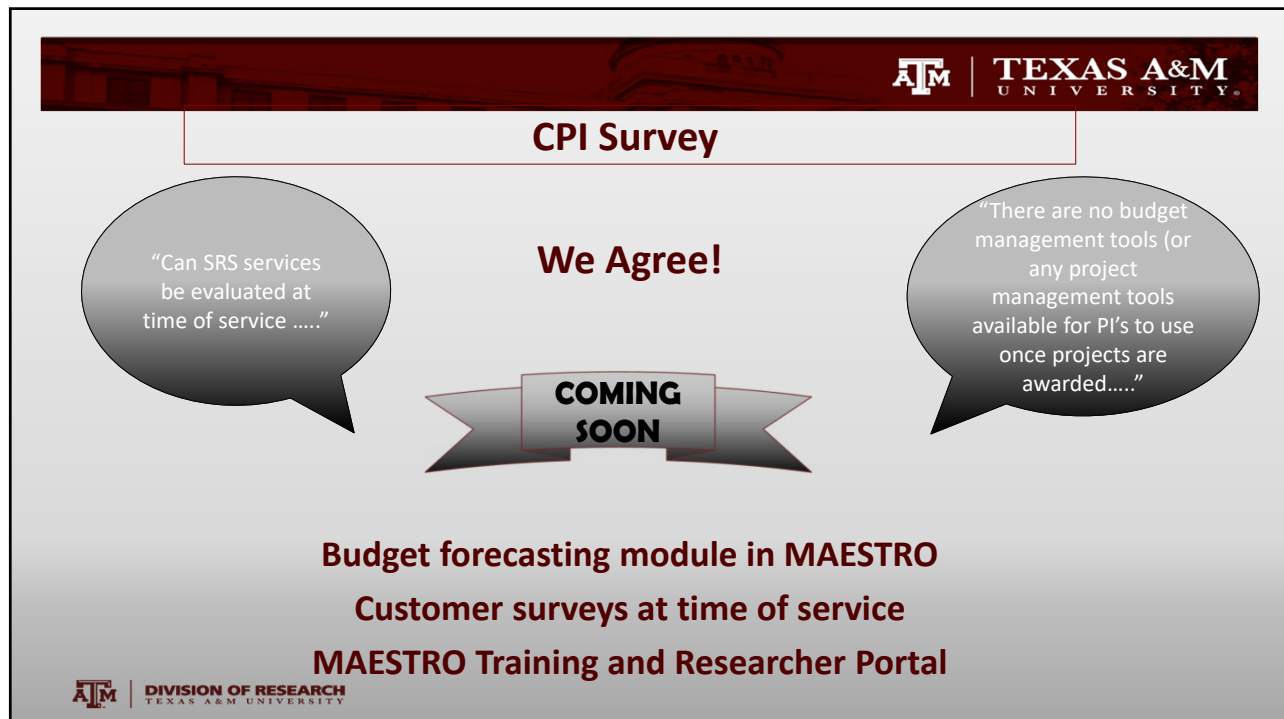
SRS Staff Workload


- SRS Dashboards to monitor workload of all units
- Expectation of staff to reply to e-mails within 24 hours (may not have a solution in 24, but an acknowledgement of the email is expected)
- Designated back-up (Manager/Team Lead) to reach out to if you experience unusual delays or complex issue
- Continuously reviewing processes to maximize efficiencies
- Federal requirements have increased over the last few years adding complexity to every unit in our office

[Leadership – Sponsored Research Services \(tamu.edu\)](http://tamu.edu)

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“Can SRS services be evaluated at time of service”

We Agree!


COMING SOON

“There are no budget management tools (or any project management tools available for PI’s to use once projects are awarded....”

Budget forecasting module in MAESTRO
Customer surveys at time of service
MAESTRO Training and Researcher Portal

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CPI Survey

“MAESTRO Is Confusing”

Contact MAESTRO for all your training needs! (maestro.tamu.edu)

Maestro Training Opportunities

In addition to our monthly scheduled training classes, we have the following Maestro Training Opportunities available:

Maestro Researcher Portal - TrainTraQ Online Course # 2114209


- This course provides an overview of the Maestro Researcher Portal. The Researcher Portal is an application that allows researchers to create, view and approve proposals, view project terms and conditions, check account balances, transactions, payroll activity and revenue.

Departmental Resources Or New Training Topics

Contact [Maestro Support](#) to request any of the following:

- Maestro Overview Presentation
- Customized Maestro Presentation specific to your departmental needs
- Request for specific training topics to be added to our scheduled classes, training videos or user documentation pages in Maestro

New Features



Maestro February Release has two new major features:


- Ability to schedule reports
- Proposal and Agreement/Project Research Keyword search

[More...](#)

Maestro Researcher Portal: An Effective Tool for Managing Your Research - 03/28/24

This session will show researchers how to use the Maestro Researcher Portal to create, view/approve proposals, view project terms and conditions, check account balances, transactions, payroll activity, and revenue. It will also show researchers how to explore the Researcher Dashboard, which is the landing page where the system summarizes all actions researchers need to perform with an easy navigation path, and gives them different alerts for their proposals, projects, or accounts.

[Presentation](#)



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Sponsored Research Services





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