

Master Proposals/Agreements

SPO has created a new type of proposal that captures a single research project that has multiple sponsors or a single award with multiple tasks that are billed separately:

Scenario 1: Master Proposal with Multiple Sponsors

Scenario: There is a single research scope that will be performed for a multiple sponsors. SPO will go to DOE for a single approval for a "Master Agreement".

Each Master Agreement has a new "K" Sponsor created when there will be multiple sponsors. Please send a request to the SPO CO for the Multiple Sponsor setup request. For Sponsor Setup request, please refer to [FAQ How do I get a Sponsor Setup?](#) The SPO CO will work with the SPO Administrator to have a unique sponsor assigned to your proposal. Please follow the RAPID Guide for the Non Federal Work for Others to set up the Master Proposal.

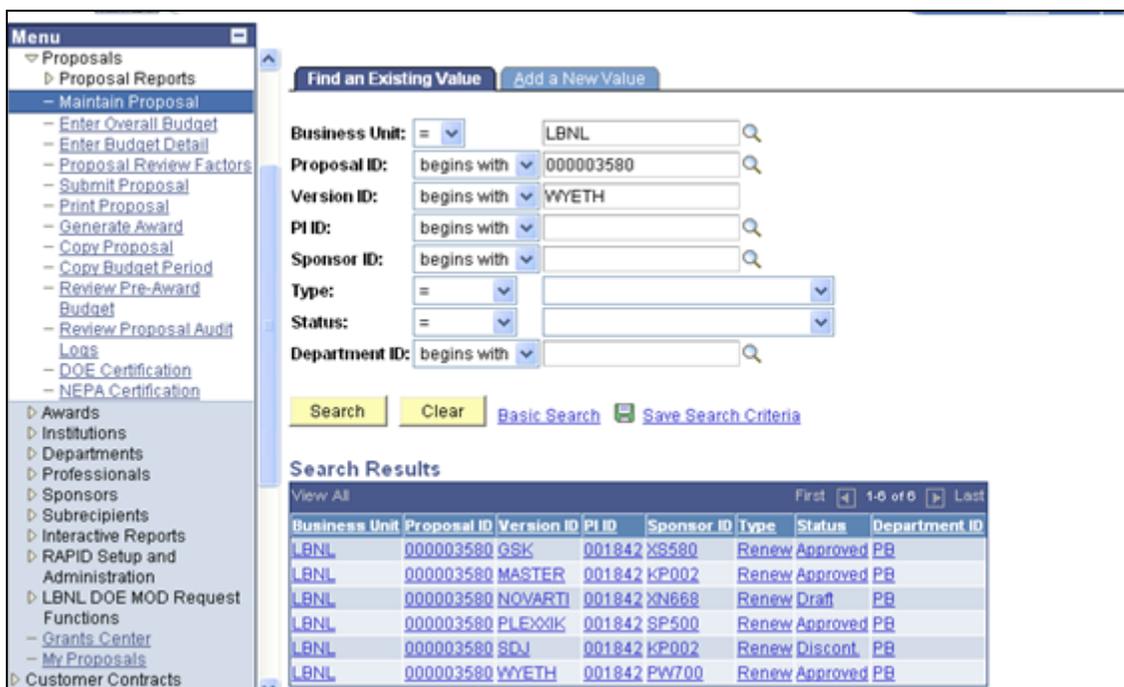
Once the Master Proposal has been completed and all approvals in place, it is used as the base proposal to copy for the award for each new Sponsor. This allows for the multiple awards to be associated with the proposal approved by DOE. It eliminates confusion and provides an easy, auditable trail for these complicated relationships.

The screenshot displays the 'Copy Proposal' form in the RAPID system. On the left is a navigation menu with options like 'Proposals', 'Awards', and 'Institutions'. The main form area includes the following fields and sections:

- From Proposal:** 000003580
- To Proposal:** [Redacted]
- From Version ID:** MASTER
- To Version:** [Empty]
- Project Section:**
 - From Project ID:** PHICPA (PHENIX Industrial Consortium)
 - To Project ID:** [Empty]
 - Primary Project
- Budget Section:**

From Budget	To Budget
<input checked="" type="checkbox"/> RENEWAL	RENEWAL

A red box highlights the 'To Proposal' field, and an arrow points from a text box below to it. The text box contains the instruction: "Enter Original Proposal ID, New Version, and New Project ID."



Step	Action
1.	<p>The Division creates a new proposal using the assigned “K” Sponsor. These “K” Sponsors represent a single research project such as the “Phenix” Consortium. The Sponsor name should use an identifier that reflects the research proposal title or description. Division follows the usual process to build out a proposal in RAPID.</p> <ul style="list-style-type: none"> ▫ Division contacts SPO CO to have a “K” sponsor created. ▫ The Proposal Budget represents a sum of all budgets from all the anticipated sponsors. This will be the budget DOE will approve.
2.	The SPO CO will work with DOE to approve the Master Proposal.
3.	<p>When DOE has approved the proposal along with other internal approvals and a Sponsor is ready to commence research, the Division and SPO will take the following steps:</p> <ul style="list-style-type: none"> ▫ The Division copies the Original Proposal using the Original Proposal ID with a new Version Number. <ul style="list-style-type: none"> ○ DO NOT USE A NEW PROPOSAL ID ○ Change the Version ID ○ CHANGE THE SPONSOR TO THE FUNDING SPONSOR (i.e. Novartis) ○ Update the dates and budget to reflect the Sponsor’s award <p>This assures that all the Certification information including DOE approval is tied to the Proposal Number used by DOE to approve the proposal.</p>
4.	<p>SPO follows the standard process to review proposal data in RAPID and Generate an Award.</p> <ul style="list-style-type: none"> ▫ The LBNL award will be the proposal number with a suffix (e.g. Sponsor name)

Scenario #2: Master Proposal with a Single Sponsor where the Tasks are billed separately

From time to time, sponsors wish to have internal tasks of a single award invoiced separately. In order to accomplish this, separate awards have to be created from a Master Proposal similar to Scenario 6 above. SPO will not separate awards for the convenience of internal tracking costs. Separate Project IDs should be used for this function.

The following steps are taken by the Division and SPO:

No Example Available at Time

Step	Action
1.	The Division creates a new proposal using the funding sponsor. The Division follows the usual process to build out a proposal in RAPID. <ul style="list-style-type: none"> ▫ The Proposal Budget represents a sum of all budgets from all the anticipated sponsors. This is the budget DOE will approve.
2.	The SPO CO will work with DOE to approve the Master Proposal.
3.	When DOE has approved the proposal along with other internal approvals and the Sponsor is ready to commence, the Division and SPO will take the following steps: <ul style="list-style-type: none"> ▫ The Division copies the Original Proposal using the Original Proposal ID with a new Version Number. <ul style="list-style-type: none"> ○ DO NOT USE A NEW PROPOSAL ID ○ Change the Version ID ○ Update the Period of Performance and Budget to the award. This assures that all the Certification information including DOE approval is tied to the Proposal Number used by DOE to approve the proposal.
4.	SPO follows the standard process to review proposal data in RAPID and Generate an Award. The LBNL award will be the proposal number with a suffix (e.g. Task Order number or PI)