

Research Excellence Fund Procedural Routing for WTAMU

Texas A&M University System Research Excellence Fund (REF)

See link: <https://www.tamus.edu/research/research-excellence-fund/>

The Research Excellence Fund (REF) is a strategic, merit-based research investment initiative administered by The Texas A&M University System to elevate research capacity, enhance competitiveness for major external funding, expand doctoral education, build collaborative teams across system campuses, and strengthen scholarly impact statewide and nationally. REF is a high-profile funding source that aligns with the system's goal — articulated by the A&M System Board of Regents (BOR) to increase research funding and doctoral enrollment in support of advancing Carnegie Classification status across member institutions.

REF supports targeted strategic programs such as collaborative research, doctoral fellowships, research infrastructure, early-stage development, and faculty mobility — all designed to accelerate high-impact research and external success.

Key REF Grants and Programs — Deadlines, Requirements, and Limits

The chart below outlines the major REF initiatives, university submission limits, and proposal deadlines (system-level). Check the following link for updates:
<https://www.tamus.edu/research/research-excellence-fund/>

Program Name	Proposal Deadline (System)	WTAMU Submission Limits	Core Requirements
Graduate Fellowships	Feb 1, 2026 (completed and closed)	1 proposal (up to 10 fellowships)	Doctoral fellowships: inter-institutional mentoring encouraged; submitted by campus CRO (VP of Research) through institutional process. (This was completed by Dr. Spaulding for the benefit of all WT doctoral programs, current and coming.)
Collaborative Discovery Grants	Apr 1, 2026	Up to 3 lead proposals	Multi-institutional research teams; transformative research with potential for major external funding.
Early-Stage Research Development Grants	May 1, 2026	Up to 5 lead proposals	Seed support for idea development, planning, and team formation for future external proposals.

Program Name	Proposal Deadline (System)	WTAMU Submission Limits	Core Requirements
Strategic Research Initiatives	May 1, 2026	Up to 5 lead proposals	Targeted system-wide research opportunities aligned to national/state priorities.
Research Equipment Grants	June 1, 2026	Up to 5 lead proposals	Shared research instrumentation for collaborative use.
Faculty Hiring and Retention Program	Rolling 2026	Up to 3 proposals	Short-term cross-campus faculty residencies/collaboration.
Proposal Cost Share Program	Rolling 2026	unspecified	Enhance success rates for large and prestigious funding opportunities that require or strongly encourage matching funds.

Note: Some REF components, like Proposal Cost Share and Faculty Hiring & Retention, operate on rolling deadlines.

Eligibility & Strategic Criteria

REF proposals typically require the following criteria; but, see specific grant or program requirements @ [Research Excellence Fund - Office of Research](#):

- Lead PIs and co-PIs should be PI-eligible faculty or research staff at TAMUS member universities.
- Multi-institutional collaboration across at least two A&M System campuses.
- Clear alignment with high-priority research themes and external funding pathways.
- Well-defined deliverables, milestones, and plans for broader impact or scalability.
- Enhanced success rates for large and prestigious funding opportunities.
- Demonstrated ability to increase institutional research dollars and doctoral enrollment.

Note: Faculty may participate as collaborators or co-investigators on REF proposals led by other Texas A&M University System institutions without affecting WTAMU's lead-submission limits. Any resulting subawards to WTAMU from externally led TAMUS REF projects must be processed through the WTAMU Office of Sponsored Research Services (OSRS) in accordance with institutional procedures.

WTAMU Internal Submission & Approval Process

Because REF is a *limited submission*, all proposals must follow WTAMU's internal coordination and approval process before being forwarded for system consideration:

1. Vetting with College Leadership

Faculty must coordinate with their college leadership, including their Dean, to ensure the proposed project meets all REF requirements and aligns with both college-level and university-wide strategic priorities. Each Dean may establish the specific internal review process for their college. As part of this vetting, faculty are strongly encouraged to submit a concise project summary to their college leadership that demonstrates alignment with the REF program objectives, eligibility requirements, allowable costs, cost-share expectations (if applicable), and the strategic criteria outlined in the section above titled, ***Eligibility & Strategic Criteria***.

2. Submission to WTAMU Sponsored Research Services (SRS)

Draft proposals (including initial Dean approval in the form of a short statement or letter) are submitted to the Office of Sponsored Research Services (OSRS) for review of institutional compliance with the REF objectives, eligibility, formatting, and budget review.

- **Institutional Endorsement Workflow**

- Upon receipt and approval of proposal compliance from the OSRS, Dr. Spaulding (Chief Research Officer) coordinates review and official routing.
- Dr. Terry (EVPP) and Deans provide executive evaluation and endorsement
- President Wendler provides final approval and includes a letter of support to be submitted with the proposal.
- Only fully vetted and institutionally supported proposals are submitted to TAMUS by the designated institutional official (CRO).

- **WTAMU Submission Limits & Selection**

If more WTAMU proposals are prepared than allowed for a program, final selection decisions will be made jointly by:

- College Deans
- EVPP Terry & VPR Spaulding
- Final decisions, if needed, will be determined by President Wendler based on strategic potential, readiness, and likelihood of success.

REF WT INTERNAL TIMELINE - Past due proposals may be rejected

ACTION	Due	Example
PI submits to Dean for prior approval	17 bus. days before deadline	Due <i>March 9</i>
PI submits to SRS for review	13 bus. days before deadline	<i>March 13</i>
SRS routes to Dr. Spaulding	10 bus. days before deadline	<i>March 18</i>
Dr. Spaulding routes for Executive review and approval	9 bus. days before deadline	<i>March 19</i>
Final Decision sent to SRS	2 bus. days before deadline	<i>March 30</i>
Submission by SRS to TAMUS	1 bus. day before deadline	<i>March 31</i>
Due Date enforced by TAMUS		<i>April 1</i>

Review, BOR Involvement, and Expectations for Awardees

After leaving WTAMU, REF proposals undergo competitive review at the system level, including evaluation by panels and final endorsement through the A&M System Chancellor and Board of Regents (BOR) — underscoring the importance of quality, institutional backing, and strategic priorities.

Awardees are expected to meet ongoing deliverables, including (see each program or grant for details):

- Milestone reporting throughout the award period.
- Demonstrated progress toward external funding goals.
- Engagement with system events and travel to present findings as requested (including at TAMUS research forums or BOR research showcases).
