

1. What is Worktribe?

Worktribe is the system we use to support our research projects through their whole lifecycle; from proposal development to post-award management and through to closure.

Worktribe research management was launched across Queen Mary in 2017, beginning with pre-award costing and contracting processes and extending into post-award account management in 2018. It is additionally used by the JRMO to manage Barts Health pre-award costing and contracting processes.

2. What is the pre-costing questionnaire (PCQ)?

The PCQ is a QMUL-hosted e-costing tool. Our Joint Research Management Office (JRMO) ask that we use this tool to enter costs, which are then transcribed into Worktribe.

3. When do I need to work up a costing in Worktribe? Do I need a costing for a Stage 1 bid, i.e. when there is a two stage application process?

Yes, a costing is required for Stage 1 bid. If QM are submitting information to an external body we go the whole way at the earliest stage. The good news is that this cuts down on paperwork if we get invited to submit a full application.

4. Who should I go to with queries? What are the roles of Pre-Award Costing Officers, Centre Managers, and Research Manager?

The Centre Manager is the first port of contact when putting together a Worktribe costing – please have an initial conversation to ensure you’ve considered all important elements of the costs, e.g. data storage and administrative support. Your Centre Manager will submit the PCQ.

The Pre-award Costings Officer will transcribe the PCQ costs into Worktribe, and you will be notified of the Worktribe Project ID via automated message from Worktribe. This is the beginning of a back-and-forth conversation between PI and Pre-award Costings Officer to finalise the costing prior to approval.

The Centre Manager is best placed to advise on topics such as (non-exhaustive):

- Salary grade and spinal point for staff included in the bid
- Project/programme specific administrative costs which will be in addition to core centre support

The Pre-award Costing Officer is best placed to advise on topics such as (non-exhaustive):

- TRAC methodology
- Minimum overhead recovery

The Research Manager will support if the bid is cross-centre or of strategic importance. The Research Manager may also be involved on an *ad hoc* basis as determined by Centre Manager workload etc. The Research Manager can also help more broadly with bid development, e.g. supply template letters of support, link into local initiatives such as the health inequalities grant clinic etc.

5. What can I do in Worktribe?

These are examples of things the PI can do in Worktribe (non-exhaustive):

- Use the @ function to talk to Pre-Award Costings Officer(s), Centre Manager, Research Manager, Co-Investigators etc. on the comments tab
- If you’re feeling confident, tweak costs yourself on the budget tab
- Upload relevant files (draft bid, peer review forms) to the documents tab

6. Is there anyone I could have talked through my budget with in a mechanical way, i.e. what goes where in the online application to the funder? For example, how to add inflationary costs?

The pre-award team in JRMO do not support with putting numbers into the online application to funders. However they may have capacity to offer some advice about specific queries. You can also consult your Centre and/or Research Manager.

7. What happens after I press “submit for approval” in Worktribe?

After you press submit for approval in Worktribe, the bid goes through a chain of approval. It will first be looked at by JRMO and once they approve, it will go through to our Institute Director (or delegate should they be on leave). You do not need to do anything manually – however do keep an eye on progress as there can be a glitch in the system, and if something is sat unapproved after more than a couple of days you can use the comments in Worktribe to ask you Pre-award Costings Officer to check for a glitch. Once you see status “Bid Submission” you have the green light to submit externally to the funder. Best practice is to then use the comments to alert pre-award that you have submitted externally. Status will then change to “Bid Awaiting Response”.

8. Does Worktribe notify me when approval is granted?

You will receive automated notifications from Worktribe as the bid works its way through the approvals chain, coming from Worktribe noreply@worktribe.com

9. How do I add extra costs that were not included/incorrectly estimated when I set up the PCQ?

Using the @ function in the comments tab, you can ask the Pre-award costing officer to add costs. Please be as clear as you can when asking for additional items, e.g. for staff include the salary grade and spinal point, the period of time you want them costed over and the FTE.

10. When should I approach my Institute Director for letter of approval? – I assumed it needed to be when the application was ready to submit for internal approvals, but I wasn’t sure.

You should be organising the letter of approval in parallel with developing the costing in Worktribe. Reach out to your Research Manager for a template letter of support.