

Training Plan for the Pre-Award Administrator

This training plan is designed to equip a Pre-Award Administrator with the foundational knowledge and skills necessary to support a faculty investigator in developing and submitting proposals for extramural funding.

The plan focuses on understanding the pre-award process, proposal development, compliance, and communication. Following this training plan, the Pre-Award Administrator will develop the necessary skills and knowledge to effectively support the faculty investigator with proposal development, review, and submission.

Phase 1: Foundation Building

TOPIC	LEARNING OBJECTIVE	RESOURCE
Institutional Overview	<ul style="list-style-type: none"> ▪ Describe the university's structure, mission, and research priorities 	RAE Instructor-led Day 1 https://sot.emory.edu/research-training/rae.html
	<ul style="list-style-type: none"> ▪ List the Office of Sponsored Programs (OSP) and college/school/department roles and responsibilities 	
	<ul style="list-style-type: none"> ▪ Locate Emory's research compliance policies and procedures 	
Pre-Award Process	<ul style="list-style-type: none"> ▪ Walk through the lifecycle of an award 	SRAi LevelUp Course: Relationships, Roles, and Responsibilities in Research Administration SRAi LevelUp Course: Principles in Pre-Award Administration https://sot.emory.edu/research-training/rae.html
	<ul style="list-style-type: none"> ▪ Identify the role of the pre-award administration in the lifecycle 	RAE Instructor-led Day 1 https://sot.emory.edu/research-training/rae.html
	<ul style="list-style-type: none"> ▪ Distinguish grants from contracts 	
	<ul style="list-style-type: none"> ▪ Identify Emory pre-award systems, policies, and processes 	

Proposal Development Basics	<ul style="list-style-type: none"> Identify proposal components: budget, narrative, biosketches, and other required documents 	SRAi LevelUp Course: Principles in Proposal Development (https://sot.emory.edu/research-training/rae.html)
	<ul style="list-style-type: none"> Describe Federal cost principles and typical budget categories and allowances 	ORA Boot Camp: CAS the Feds Say So (https://emory.brainier.com/#/object/1896)
	<ul style="list-style-type: none"> Identify Emory proposal submission systems and deadlines 	RAE Instructor-led Days 1 & 2 (https://sot.emory.edu/research-training/rae.html)
Compliance Fundamentals	<ul style="list-style-type: none"> Summarize financial compliance and relevant federal regulations 	SRAi LevelUp Course: Research Compliance Frameworks (https://sot.emory.edu/research-training/rae.html)
	<ul style="list-style-type: none"> Locate Emory’s institutional policies and procedures for research compliance 	RAE Instructor-led Days 1 - 3 (https://sot.emory.edu/research-training/rae.html)
	<ul style="list-style-type: none"> Describe the importance of research integrity and misconduct 	
Communication and Collaboration	<ul style="list-style-type: none"> Develop effective communication skills with faculty investigators, staff, and sponsors 	SRAi LevelUp Course: Relationships, Roles, and Responsibilities in Research Administration (https://sot.emory.edu/research-training/rae.html)
	<ul style="list-style-type: none"> Build relationships with key stakeholders 	ORA Boot Camp: Hi Post-Award, Meet Pre-Award (https://emory.brainier.com/#/object/2338)
	<ul style="list-style-type: none"> Identify best practices in managing expectations and deadlines 	

Phase 2: Practical Application

TOPIC	LEARNING OBJECTIVE	RESOURCE
On-the-Job Training	<ul style="list-style-type: none"> Shadow an experienced Pre-Award Administrator on various proposal development tasks 	
	<ul style="list-style-type: none"> Assist with proposal preparation, review, and submission 	
	<ul style="list-style-type: none"> Learn how to use Emory institutional systems for proposal development and submission 	Compass: Emory Proposal Express - EPEX (https://emory.brainier.com/#/object/870) ORA Boot Camp: Workflows in EPEX (https://emory.brainier.com/#/object/1913) Cayuse 424 (https://compass-login.emory.edu)
Proposal Development	<ul style="list-style-type: none"> Develop a strong understanding of proposal budgets and cost principles 	SRAi LevelUp Course: Principles in Proposal Development (https://sot.emory.edu/research-training/rae.html)
	<ul style="list-style-type: none"> Learn how to analyze funding opportunity announcements (FOAs) and develop compliant proposals 	RAE Instructor-led Day 1 (https://sot.emory.edu/research-training/rae.html)
Budget Deep Dive	<ul style="list-style-type: none"> Describe Federal cost principles and typical cost categories 	RAE Instructor-led Days 1 & 2 (https://sot.emory.edu/research-training/rae.html) ORA Boot Camp: Annualized Salary (https://emory.brainier.com/#/object/2143)
	<ul style="list-style-type: none"> Explore sponsor-specific budgeting nuances and Emory budgeting tools 	ORA Boot Camp: ARPA-H Budgeting (https://emory.brainier.com/#/object/1889) ORA Boot Camp: Budgeting for Clinical Trials – Federal vs Industry (https://emory.brainier.com/#/object/2281)

		<p>ORA Boot Camp: Demystifying the NIH Modular Budget https://emory.brainier.com/#/object/2175</p> <p>ORA Boot Camp: Participant Support vs Incentives https://emory.brainier.com/#/object/1904</p> <p>ORA Boot Camp: Selecting the Appropriate Indirect Cost Rate https://emory.brainier.com/#/object/2553</p>
Compliance Deep Dive	<ul style="list-style-type: none"> Identify compliance areas relevant to the faculty investigator’s research (e.g., human subjects, animal welfare, conflict of interest) 	<p>SRAi LevelUp Course: Principles in Proposal Development (https://sot.emory.edu/research-training/rae.html)</p>
Sponsor Requirements	<ul style="list-style-type: none"> Describe specific sponsor requirements (federal, state, private) 	<p>SRAi LevelUp Course: NIH R Series mGuide (https://sot.emory.edu/research-training/rae.html)</p> <p>ORA Boot Camp: Demystifying the NIH Modular Budget https://emory.brainier.com/#/object/2175</p> <p>ORA Boot Camp: NIH Just in Time (JIT) Requests https://emory.brainier.com/#/object/1901</p>
	<ul style="list-style-type: none"> Practice navigating sponsor-specific proposal guidance 	<p>SRAi LevelUp Course: NSF Research mGuide (https://sot.emory.edu/research-training/rae.html)</p>

Phase 3: Advanced Skills

TOPIC	LEARNING OBJECTIVE	RESOURCE
Subaward Requirements	<ul style="list-style-type: none"> Describe subaward processes and regulations 	SRAi LevelUp Course: Principles in Proposal Development (https://sot.emory.edu/research-training/rae.html)
	<ul style="list-style-type: none"> Describe Emory's subaward processes and regulations 	RAE Instructor-led Day 1 (https://sot.emory.edu/research-training/rae.html)
		<p>ORA Boot Camp: Subawards and Subcontracting at Emory (https://emory.brainier.com/#/object/1911)</p> <p>Tuesday Tech Tip: Locating Subrecipient Information in the OSP Subaward System (https://emory.brainier.com/#/object/2173)</p>
Award Negotiation	<ul style="list-style-type: none"> Locate and review award terms and conditions 	<p>SRAi LevelUp Course: Principles of Post-Award Non-Financial Research Administration (https://sot.emory.edu/research-training/rae.html)</p> <p>SRAi LevelUp Course: Principles of Award Negotiation and Set-up (https://sot.emory.edu/research-training/rae.html)</p>
	<ul style="list-style-type: none"> Describe how to negotiate award terms and conditions and Emory's preferred position 	<p>RAE Instructor-led Day 2 (https://sot.emory.edu/research-training/rae.html)</p> <p>ORA Boot Camp: Federal Contracts at Emory (https://emory.brainier.com/#/object/2070)</p>
Post-Award Transition	<ul style="list-style-type: none"> Identify the role of the Pre-Award Administrator in the post-award phase 	SRAi LevelUp Course: Principles of Post-Award Non-Financial Research Administration (https://sot.emory.edu/research-training/rae.html)
	<ul style="list-style-type: none"> Recognize how award information is prepared and 	RAE Instructor-led Day 2 (https://sot.emory.edu/research-training/rae.html)

	transferred to the post-award team	
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Phase 4: Ongoing Development

TOPIC	LEARNING OBJECTIVE	RESOURCE
Professional Development	<ul style="list-style-type: none"> Attend conferences and workshops related to pre-award administration 	<p>National Council of University Research Administrators (NCURA) (https://www.ncura.edu/)</p> <p>Society of Research Administrators International (SRAi) (https://www.srainternational.org/home)</p>
	<ul style="list-style-type: none"> Earn relevant certifications (e.g., Certified Research Administrator) 	<p>RACC Study Program (https://sot.emory.edu/research-training/racc-program.html)</p>
	<ul style="list-style-type: none"> Comply with the ORA Continuing Education requirement 	<p>ORA Policies and Guidelines (https://ora.emory.edu/guidance/)</p>
Staying Updated	<ul style="list-style-type: none"> Keep up with changes in regulations and policies 	<p>ORA Communications</p>
	<ul style="list-style-type: none"> Maintain knowledge of Emory policies related to sponsored projects 	<p>ORA Policies and Guidelines (https://policies.emory.edu/policies-list.html)</p>
	<ul style="list-style-type: none"> Monitor relevant funding opportunities and trends 	<p>Sponsor listservs/updates:</p> <ul style="list-style-type: none"> NIH (https://list.nih.gov/) NSF (https://new.nsf.gov/news) <p>Grants.gov Community Blog (https://grantsgovprod.wordpress.com/)</p>
Additional Tips	<ul style="list-style-type: none"> Explore mentorship with an experienced colleague 	

	<ul style="list-style-type: none">▪ Access and review relevant resources, such as policy manuals, training materials, and online databases	
	<ul style="list-style-type: none">▪ Ask questions and seek clarification	
	<ul style="list-style-type: none">▪ Seek supervisor feedback and evaluation to assess training effectiveness	