

Title: OVPR Research Administration Services

**Background:**

OVPR Research Administration provides full grant lifecycle (pre-award through post-award closeout) research administration services to all UMOR units. This document provides the base level services the team will provide to UMOR units.

**Pre-Award:**

- Assisting project teams in understanding and meeting all proposal requirements
  - This includes internal and external funding opportunities
- Thorough review of proposal guidelines against University and UMOR policies and advise project teams accordingly
- Preparation of proposal paperwork including but not limited to:
  - Proposal Award Form (PAF) in eResearch
  - Budget forms
  - Budget justification (provide example/template and work collaboratively with PI/Project Teams to complete)
  - Complete subcontract information as required per the proposal
  - Enter applicable cost share commitments
  - Review all submission documents for completeness, accuracy and compliance with sponsor and University guidelines/policies if documentation is submitted within applicable deadlines provided to the project team
- Review PAFs where UMOR personnel are listed for accuracy, completeness and adherence to UMOR guidelines
  - This includes ensuring that the personnel listed are also in agreement with the proposal and their role
- Provide guidance to PI/project teams of documentation necessary to submit for the proposal
- Advise on all deadline policy related matters
  - UMOR policy is that all proposals must meet the full review deadline which is 4 business days before the sponsor due date. Anything that will not make the full review requires additional approvals from the applicable AVP and the VPR.
- Finalize PAF and route for final approval and submission and respond to PAF revision requests from ORSP
- Assist PI and Project Team with Just in Time (JIT) requests
  - Provide guidance as to required documentation
  - Point of contact between project team and ORSP
  - Review and submit documentation to ORSP/Sponsor on behalf of PI/Project team
    - Review of documentation will occur within applicable deadlines given to the project team
- Provide guidance to PI and Project Team with Award Acceptance Requests (AAR)
- Provide amazing customer service
- Liaison with applicable central offices (internal and external) as needed on behalf of the PI and Project Team

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**Post-Award:**

- At award set-up review award documentation and alert PI/Project team items to pay attention to
  - A meeting with the PI and Project team may be set up to discuss the project in more detail
    - For example, this could include reviewing the budget with PI and Project team to review for budget cuts, effort allocations, purchasing agreements, Cost Share (CSTSH) commitments, etc.
- Ensure that ORSP and Sponsored Programs set up the award and project grant (chartfields) properly
  - This includes any subaccounts that may be needed
- If subcontracts are required, process the necessary paperwork to set up applicable subcontracts
- Appoint current personnel to the newly established projects and make changes to effort throughout the life of the project as necessary
  - Any new personnel (new hires) need to be routed through UMOR HR prior to appointment on funding
- Complete budget reallocations as needed
- Monitor financial activity and provide financial reports (quarterly at a minimum) to PI and/or project teams. Through this process the RA will:
  - Ensure expenditures are necessary, allowable and allocable
  - Communicate with PI and Project Team as to financial items that require additional attention
- Monitor all cost share for applicable projects ensuring proper use and revenue transfers are completed timely
- Project forecasting as needed
- Process journal entries (transfers of expense and revenue) and/or effort changes for applicable sponsored projects (including 120 days transfers)
- Prepare post-award change requests in collaboration with the PI and/or Project Team. This can include but is not limited to:
  - No-Cost time extensions
  - Rebudgeting requiring sponsor approval
  - PI or other key personnel changes
- Assist in financial closeout with includes reviewing the Financial Status Reports (FSR) and working with PI/Project Team for timely completion of financial reports
  - This may include interim reports and working with sponsors for sponsor specific financial reporting
  - If applicable, work with any subaccount research administrator for subaccount FSR's
  - Any technical reporting is the responsibility of the PI and Project Team
- Liaison with applicable central offices (internal and external) as needed on behalf of the PI and Project Team
- Provide amazing customer service

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**Unit responsibilities:**

- HR transactions like posting positions, salary changes, promotions, etc.
- Completion and submission of technical reporting to sponsor
  - RA team will help with financial pieces and effort tracking if required for inclusion in a technical report based on sponsor guidelines, e.g. RPPR
- Administrative duties related to grant award - scheduling meetings, providing meeting minutes, management of project team, procurement, etc.
  - Procurement - RA Team will advise on sponsored accounting standards prior to PO or payment being issued
- Completing cost share request paperwork
  - RA team will advise on policy requirements and aid with required financial pieces required for cost share requests
- Collection of items like Biosketches and current & pending/other support documentation done by project team
  - RA team will review for completeness with sponsor and institutional guidelines, as deadlines allow
- Collection of unit specific grant metrics
  - The RA team can advise as to what reports to run but the regular collection of data is the responsibility of the UMOR units

**Relevant Definitions**

- CSTSH – Cost Share
- HR – Human Resources
- PAF – Proposal Award Form
- PO – Purchase Order
- UMOR – U-M Office of Research
- OVPR – Office of the Vice President for Research
- RA – Research Administrator/Administration

**Responsible for Reviewing and Updating Services**

OVPR Associate Director for Research Administration

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