

Everything but the Science: Up Close and Personal with the Administrative Shell

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**OSR Chicago Monthly Meeting
March 17, 2016**

Northwestern

Getting Close with the Admin Shell

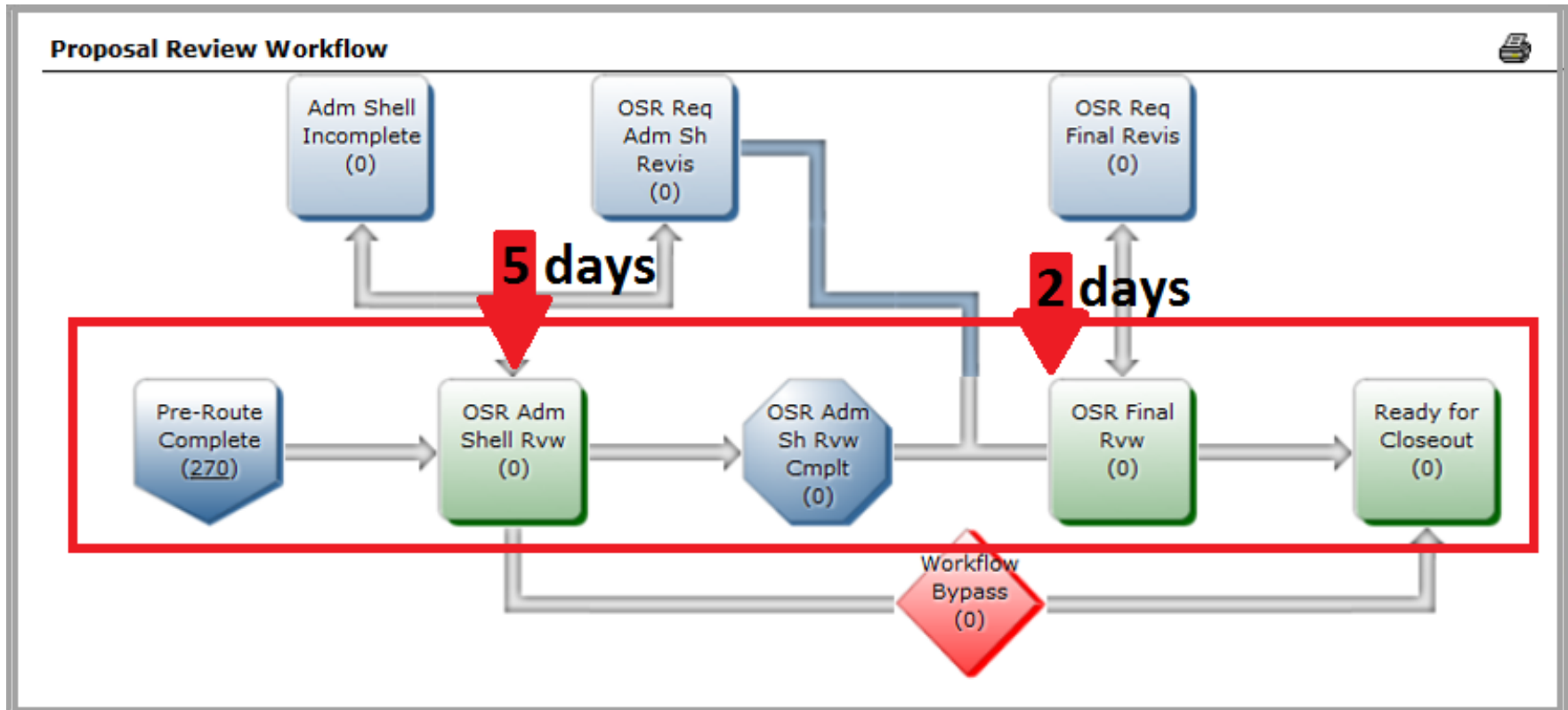
- Why are we talking about the admin shell?
- What is the admin shell?
- How do you win at admin shell construction?
- Where can you find additional resources?

Why are we talking about the
admin shell?

The Sponsored Project Life Cycle



InfoEd Proposal Review Workflow



What is the Admin Shell?

(more accurately – What is a
COMPLETE Admin Shell?)

The Admin Shell Defined

- **Administrative Shell:** All proposal elements that are non-technical in nature (i.e. “everything but the science”)
- **COMPLETE Admin Shell:** All required admin shell (non-technical) elements have been
 - completed as instructed
 - uploaded into InfoEd PD
 - respective InfoEd tabs marked ‘complete’

Admin Shell Checklist (in short)

Required Documents

- InfoEd PD Proposal Routing Form
- Budget
- Budget Justification
- SOW / Abstract

Other Required Documents

***** as applicable *****

- FCOI Disclosures
- Biographical Sketches
- Capital Equipment Quote(s)
- Cost Share Documentation
- Facilities, Equipment & Other Resources
- Invitation or Permission to Submit
- Letters of Support or Collaboration
- Sponsor Solicitation/Guidelines
- Current & Pending/Other Support Document(s)
- Sponsor-Specific Forms /System Access
- Subrecipient Commitment Documentation
- Other Documents as required



Standard Admin Shell Components: Proposal Routing Form

- Proposal Routing Form: Cover sheet that summarizes important information
- Complete routing form includes all necessary approvals with mandatory fields filled out
- Complete routing form prompts “pre-route complete” status in InfoEd

Standard Admin Shell Components: Budget

- Budget: Itemized list of anticipated costs to execute the proposed project
- Two types of costs outlined in the budget:
 - Direct costs & Indirect costs
- Complete budget accurately outlines all costs as instructed and is entered in InfoEd internal documents in the sponsor-required format

Standard Admin Shell Components: Budget Justification

- Budget Justification: Narrative justifying the expenses listed in the budget
 - i.e. The “how and why” of the costs outlined in the budget.
- Sponsor-specific guidelines
- Complete budget justification provides sufficient documentation for budget costs in the format required by the sponsor

Standard Admin Shell Components: Statement of Work (SOW)

- SOW: Brief, general project summary
 - Includes proposed objectives and activities
 - Written in lay language
 - AKA Abstract or Project Summary
- Principal Investigator (PI) generated
- Complete SOW is (at minimum) a viable draft of this document

Required Admin Shell Items: As Applicable (by sponsor/solicitation)

- Other documents that may be required by sponsor
 - Sponsor-Specific Forms /System Access
 - Biographical Sketch(es)
 - Facilities, Equipment & other Resources Documents
 - Subrecipient Commitment Packages
 - Other Supplemental Information (e.g. letters of support, F&A waivers, equipment quotes, consultant letters)
- Internally-required items
 - FCOI Disclosures
 - Cost Share Documentation (*if applicable*)
 - Final Internal Budget (Excel format)
 - Sponsor Solicitation/Guidelines (non-parent opportunities)

Winning Admin Shell Construction



Becoming an RA Rock Star
#WinningRA #RARockstar

Secrets of the RA rock star

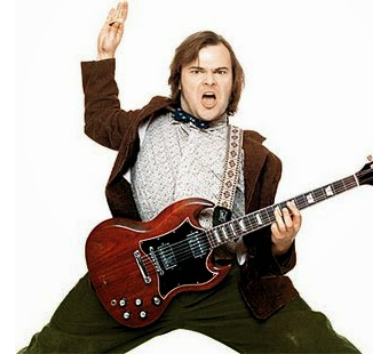
1. Read the solicitation carefully – very carefully!
 - Pay close attention to solicitation details
 - Proofread: catch the ‘easy stuff’ early

2. Prepare early
 - Maintain a repository of standard items (e.g. current biosketches, list of trainees)
 - Create an InfoEd record sooner than later
 - Request [subcontracts](#), [sponsors](#), and accounts ([eRA Commons](#), [FastLane](#)) ASAP
 - Keep in mind system limitations
 - OSR standard business hours: 8:30am – 5:00pm



Avoid Pitfalls

- Don't think you know it all
- Don't be afraid to ask for help
- Research Administration is a team sport



Additional Resources

Supplemental Sponsor Guides

Sponsors → Supplemental Guidelines

National Science Foundation (NSF) → [Grant Proposal Guide \(GPG\)](#)

Department of Defense (DOD) → General Information and Program Announcement

Department of Health and Human Services → [Form PHS 398](#)

· National Institutes of Health (NIH) → [SF 424](#)

OSR Help Resources

- Use existing job aids:
 - Admin shell checklist
 - [FFRA InfoEd Guides](#)
- Find or request help:
 - [OSR Help Central](#)
 - OSR Info Team [HELP Button](#)
- Get hands-on assistance: [Open Labs](#)
- Stay informed:
 - [OSR Listserv](#)
 - News/Events on the [OSR website](#)



OSR Training Resources

- [Sponsored Projects Online Training \(SPOT\)](#)
 - Phase 1 (Feb. 2016); Phase 2 (coming May 2016)
 - Mini-courses (Intro, Solicitations, and – coming soon - Anatomy of the Administrative Shell)
 - Microlearning modules
 - OSR Live! Presentations
- Future Directions
 - UG-centered microlearning series
 - In-person training
 - Move to Learn@Northwestern



Questions?

