

T103: SPEAKING EFFECTIVELY TO A PRINCIPAL INVESTIGATOR EVEN WHEN YOU ARE MARRIED TO ONE

SRAI Midwest/Northeast Section Meeting (Chicago, IL)

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Jason J. Claes, MBA, MSM, GRCRA

Assistant Director Research Accounting, Sponsored Research Services (University Cincinnati)

International Bylaws Chair

Membership Committee Member

Midwest Section Treasurer

Quarterly Catalyst Contributor – 'Day In The Life of a Research Administrator'

Recipient of JRA Writing Fellowship (Spring 2018)

Grant Recipient: Rapid Cycle Improvement Collaborative



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HIGHLIGHTS

- Group Introductions
- “Speed dating” – *SRAI style*
 - Break down on key principles
 - Discussion focused on tools for the Grant administrator
- Take Away / Key Points

INTRODUCTIONS

- Who are you?
- What role do you perform?
- What role does your PI think you perform?
- What is the one thing you want to communicate to your PI the most?

"SPEED DATING – SRAI style"

- ▶ 3 situations/questions will be given to the group for individuals to discuss one-on-one (2.5 minutes to each share):
 - ▶ Following one-on-one conversations, we will have group discussion on the key issue(s) & offer methods to better approach these situations.
- ▶ After group discussion (before the next situation & questions):
 - ▶ Individuals will meet up with a different person to discuss the next question.

SITUATION #1

The deadline for an application is in two days to the sponsor and your PI has yet to provide you with the completed science, bio-sketches, and finalization of budget. To add to the mix the subcontractor has yet to provide the signature page while the in-kind contribution letter has still yet to be reviewed.

SITUATION #1 DISCUSSION QUESTIONS

Question 1: Who should be in charge of this situation? (*PI, Post/Pre-doc, Centralized Office, You*)

Question 2: If you are not in charge, how can you support the team or share that responsibility? (*Experience, Knowledge*)

Question 3: How do you prevent this from happening in the future?

SITUATION #1 KEY TAKE AWAYS

Leadership:

- How can leadership play into this situation?
- Can leadership be shared?
- How can you come across as stern and not a bully?

Team Management:

- Shared responsibilities?
- Is there a plan?
- Do each of you know your objectives?

SITUATION #2

The PI wants to respond to an RFA/PA that you know they are not ready for – OR- your institution is not able to successfully support in executing the AIMS.

SITUATION #2 DISCUSSION QUESTIONS

Question 1: What is the hardest thing to convey to your PI?

Question 2: What are innovative ways to assist the PI in executing his or her needs/wants with their research?

Question 3: How can you help your PI envision what needs to be done?

SITUATION #2 KEY TAKE AWAYS

Research Appropriateness:

- Subject matter expert?
- Share policies, procedures, protocols?
- Due diligence on both parts?

Training Your PI:

- Share copies of RFA/PA?
- Listserves?
- Acknowledge expertise?

SITUATION #3

With institutional policy/procedures established, you are asked to get a letter signed for a sponsor ensuring all costs/protocols have been followed knowing (some or all) were never met.

SITUATION #3 DISCUSSION QUESTIONS

Question 1: How do you see yourself in situations like this - proactive or reactive?

Question 2: Are you every flexible with your PI and other departmental / institutional administrators?

- If yes, what are your "internal criterias" for flexibility?

Question 3: Do you formulate a plan from start to finish, including evaluation of the process and analysis of what worked and what needs improving?

- If yes, how do you do this?

- If no, what would you like to do?



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SITUATION #3 KEY TAKE AWAYS

Managing Expectations:

- (overspent, underspent, reports due, invoicing...)

KEY POINTS

LEADERSHIP STRENGTHS/WEAKNESSES

MANAGEMENT

RESOURCEFULNESS / PLAN FOR EXECUTION

DISSECT

WHAT IS COMMUNICATION

- What does communication look to you?
- What does communication look to your PI?
- What does communication look to your team?
- Is your message coming across affectively?

COMMUNICATING WITH THE PI

What are my roles / what are your roles

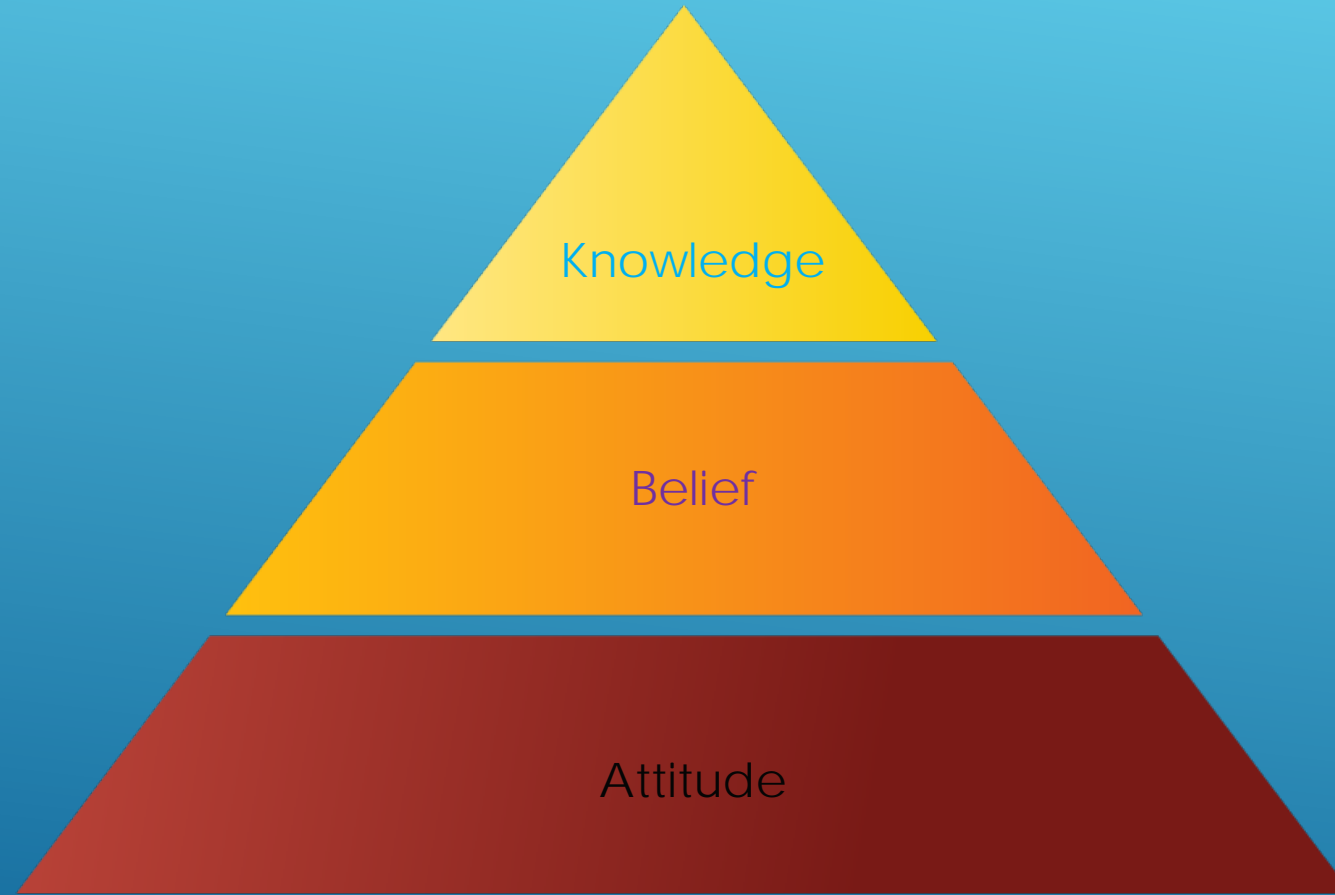
Make it personable

Young/Junior Investigators (big educational seminar of what we have to offer, introduce institutional policies, and explain the “why” of such policies)

Establish a meeting with Investigator following their initial draft of the Basic Aims (budget can be developed)

Develop a timeline with expectations & deadlines

COMMUNICATION PYRAMID



If we don't understand attitude and belief no amount of knowledge creates anything more than just a fad.
Not the cultural change we are seeking.

TOOLS

- Strategic Thinking?
- Decision Making?
- Conflict Resolution?
- Team Building?
- Delegation?
- Mentorship?
- Innovation?

EXECUTION & BLUNDER

Historical experience (setting precedence) ideal world with a new PI

How do you leverage your strengths and weaknesses?

How do you align your PI's strengths and weaknesses to yours?

With limitations facing you, what is the most important tool you wish you had to managing your PI's research?

TAKE AWAYS

Focus on Developing Helpful Mindsets

Show Presence with Consistency

Be Innovative



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RESOURCES

Patterson, K., Grenny, J., McMillan, R., Swizler, A. (2012). *Crucial Conversations: Tools for Talking When Stakes Are High, Second Edition*. McGraw-Hill (ISBN-13: 978-0071775304)

Stone, D., Patton, B., Heen, S. (1999). *Difficult Conversations*. Penguin Books (ISBN-978-0-14-3118844-2)

Covey, S. (1989). *The 7 Habits of Highly Effective People*. Simon & Schuster (ISBN-978-1-4767-4005-8)

Stone, D. and Heen, S. (2015). *Thanks for the Feedback*. Penguin Books (ISBN-978-0-14-312713-0)

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Donna Claes, MD, MS, BSPHarm – Medical Director Dialysis Cincinnati Children's

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CONTACT:

jason.claes@uc.edu



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QUESTIONS

THANK YOU!



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