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Pre-Award Preparation for a Post-Award Success

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No financial disclosures.

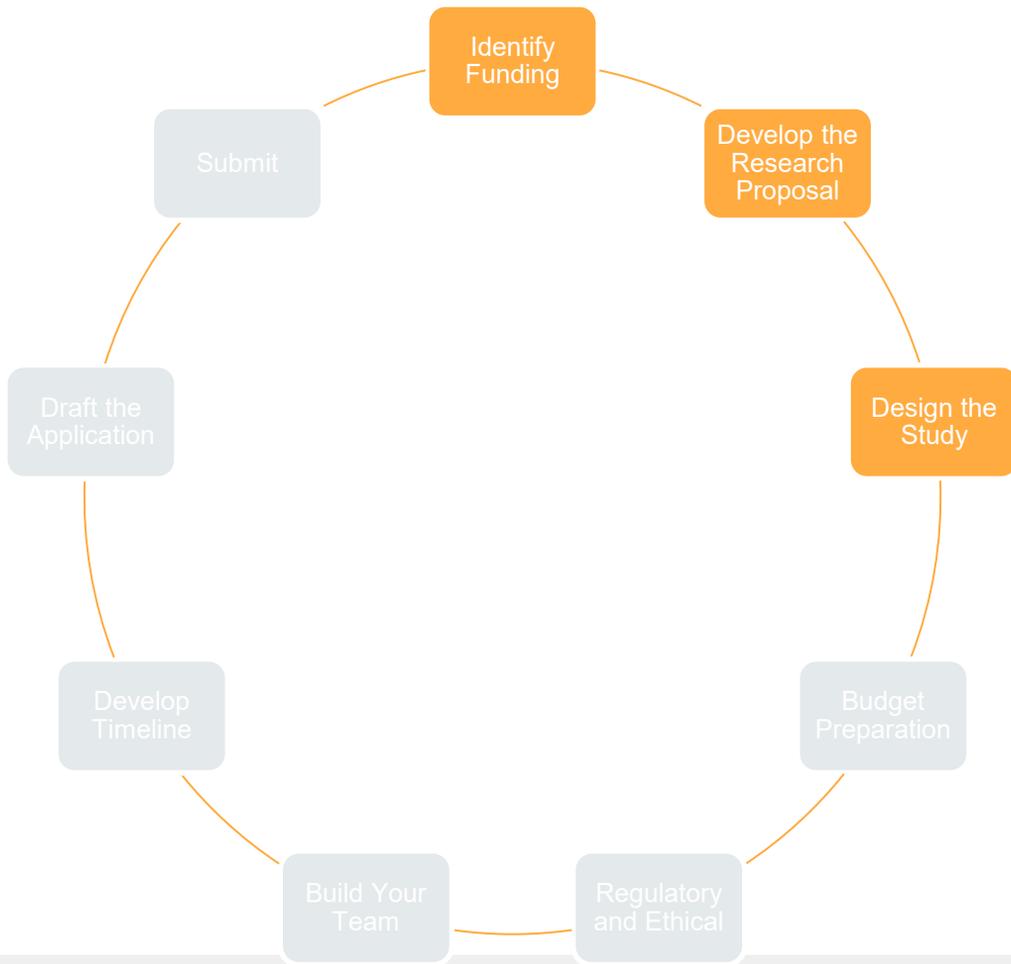
Objectives

- Evaluate the importance of pre-award preparation and discuss effective budget tools and strategies.
- To discuss the pre-award process and strategies to be competitive in your application, mitigate pre-award challenges, and collaborate effectively with your institutional partners.

Pre-Award Process.

Why is it important?





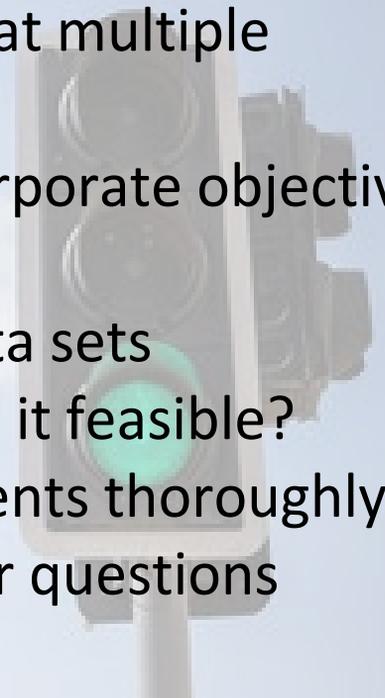
LOOKOUT! Pitfalls of early stage planning

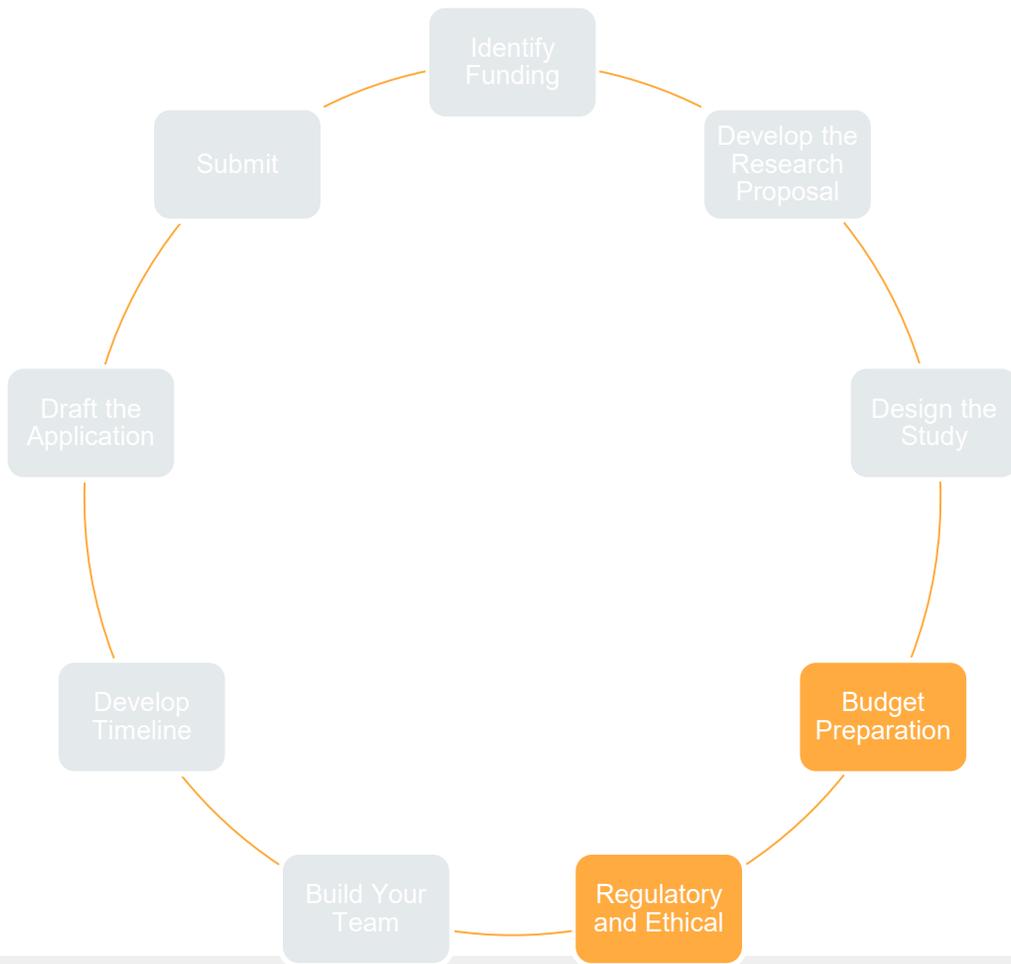
- x Struggle to find funding
- x Misalignment with funder priorities
- x Lack of preliminary data
- x Unrealistic project scope
- x Failure to meet eligibility requirements





All Clear! Early Stage Planning Strategies

- ✓ Utilize network and look at multiple funding mechanisms
 - ✓ Read guidelines and incorporate objectives into proposal
 - ✓ Investigate public use data sets
 - ✓ Realistic Project Scope- Is it feasible?
 - ✓ Read eligibility requirements thoroughly and know where to go for questions
- 



LOOKOUT! Pitfalls of Budgeting and Compliance

- x High-level, unsupported guesses
- x Poor resource planning
- x Budget narrative does not align to proposal narrative
- x Missing or incomplete regulatory documentation



What is required for a budget justification?

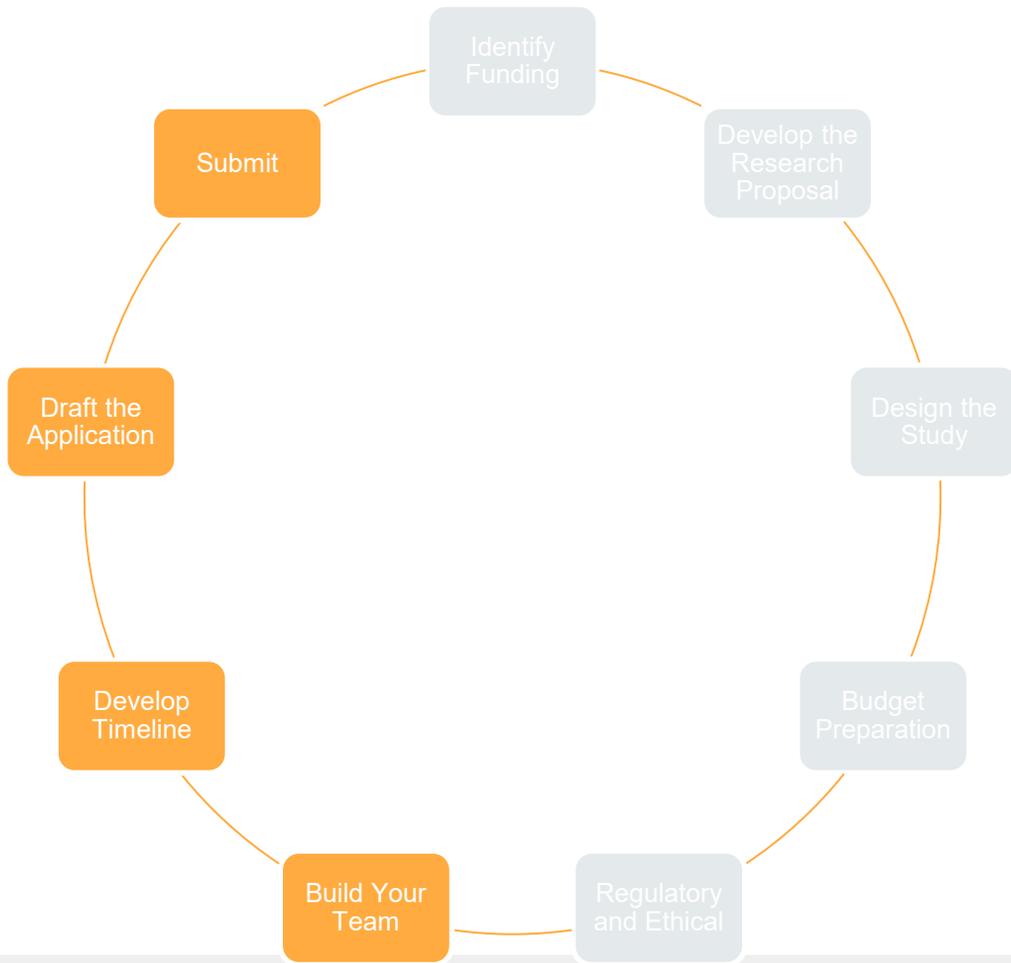
- The narrative!
- Clearly describes the justification for each requested budgetary line item.
- Should follow the specific categories:
 - Personnel
 - Consultants
 - Equipment
 - Supplies
 - Travel
 - Patient Care Costs
 - Alterations and Renovations
 - Consortium and Contractual
 - Other Expenses
 - Facilities and Administrative





All Clear! Budgeting and compliance strategies

- ✓ Detailed budgets based on realistic cost estimates
 - ✓ Consider all project phases, delays and contingencies
 - ✓ Utilize best practices to compile budget narrative
 - ✓ Begin compliance reviews early and know where to find the necessary resources
- 



LOOKOUT! Pitfalls of late-stage planning

- ✗ Unclear team roles and responsibilities
- ✗ Poor communication amongst collaborators
- ✗ Unrealistic timelines
- ✗ Submitting at the last minute

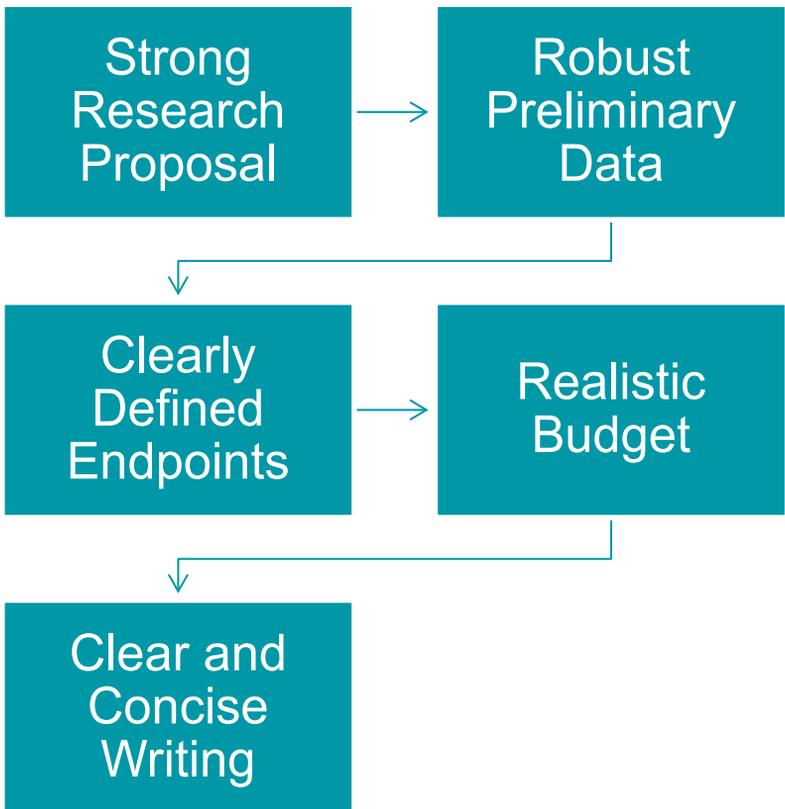




All Clear! Late-stage strategies

- ✓ Clearly define roles and responsibilities
 - ✓ Identify collaborators early and establish communication pathways
 - ✓ Define clear, detailed and achievable timelines
 - ✓ Set internal deadlines before the submission date to allow time for review, revisions and approvals
- 

How to be competitive!



Small Group Activity



SOCIETY OF
RESEARCH
ADMINISTRATORS
INTERNATIONAL

- 1) Discuss how your site mitigates pre-award challenges *or* what could your site do better with mitigating challenges.**
- 2) When preparing a budget, what are some unexpected expenses and how can you ensure account for them during the award preparation process?**
- 3) Share some ideas or anecdotes on how you have been competitive in your grant applications.**

Round Table Discussion: 15 minutes

Report Out: 15 minutes

Questions?

Thank you!

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