

THE CRITICAL ROLE OF 
 A PI'S PIT CREW 



Introduction

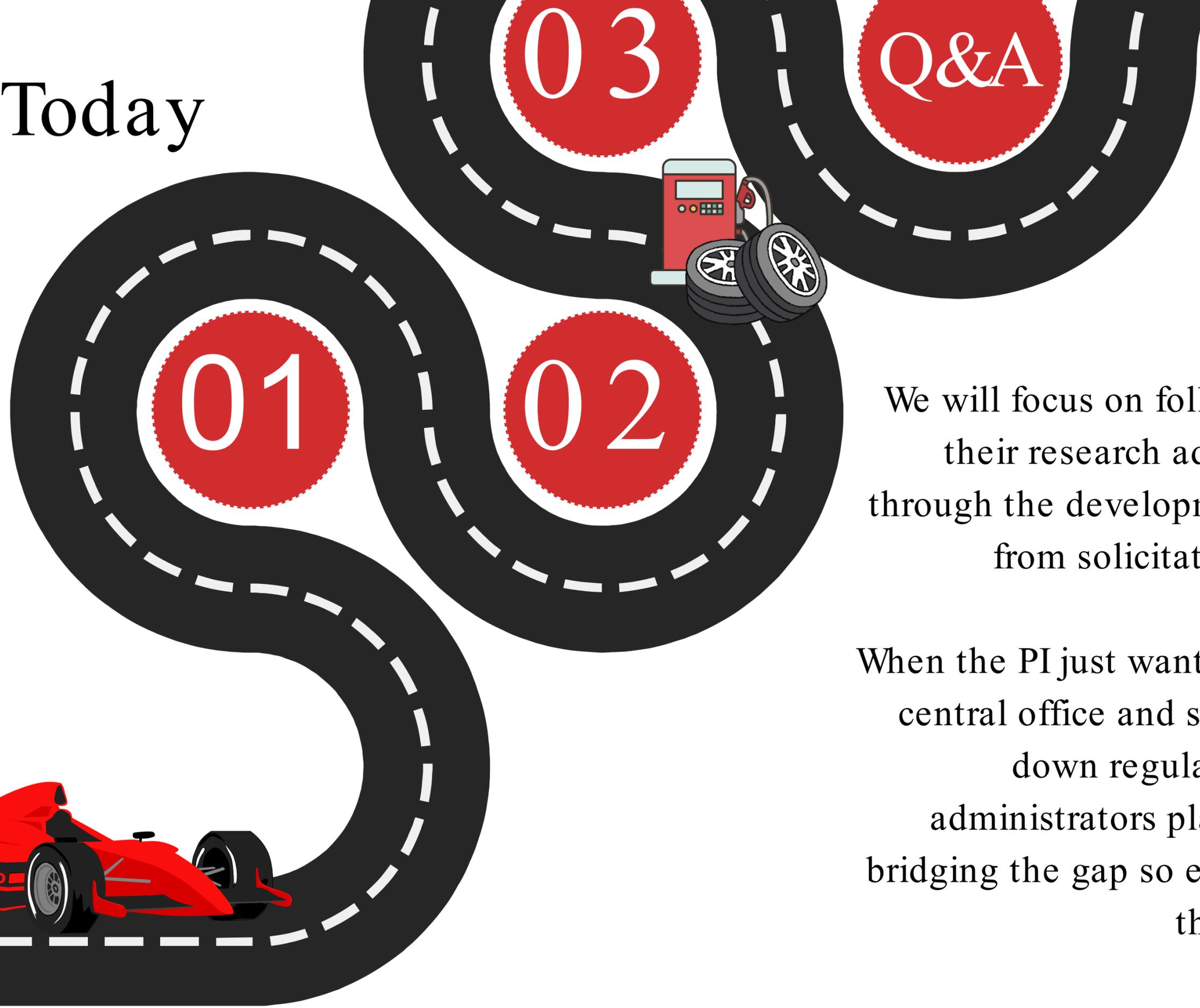
The Research Administrator (RA) is a Principal Investigators (PI) biggest supporter during the research cycle of an award, through prepping the proposal, supporting its implementation and making sure it gets across the finish line.

This interactive session will provide research administrators with an overview of the aspects of collaboration needed between PIs (driver), Department Administration (pit crew), Central Offices (team boss), and Sponsors (FIA) to navigate the conditions of the track.

What Today

Will

Cover



We will focus on following faculty and their research administration team through the development of a proposal from solicitation to submission.

When the PI just wants to drive, and the central office and sponsors are laying down regulations, department administrators play a critical role in bridging the gap so everyone can reach the checkered flags.

Today's Goals

The goal for this session is to provide perspectives of each side of the departmental pre-award process and an overview of the tools and strategies used to effectively communicate.

During these examples, we will focus on PI and RA communication, collaboration and ways to streamline.

Case Studies:

01

TIMELINES

Assess the proposal timeline from both the administrator and investigator perspectives

02

SCIENCE DRIVEN BUDGETS

Meet with your PIs to understand the science driven nature of the proposal and how the budget can support it

03

POST AWARD IMPLEMENTATION

Consider the feasibility of implementation at the time of proposing.

LET'S GET TO KNOW EACH OTHER

Our methodology places a large focus on PI and RA communication. Ensuring open dialogue assists us with the day to day transactional nature of research administration and the overall support of portfolio management.



OVERALL RATING **90**

EXPERIENCE
10+ YEARS

POSITION
POST AWARD
RESEARCH
ADMINISTRATOR

SPONSOR
EXPERINCES
DOD, NIH, DOT,
AIR FORCE



VANESSA
ROOK

HARVARD MEDICAL SCHOOL



OVERALL RATING **80**

EXPERIENCE
5+ YEARS

POSITION
GRANTS
PROGRAM
MANAGER

SPONSOR
EXPERINCES
NASA, NIH,
NSF, DOD

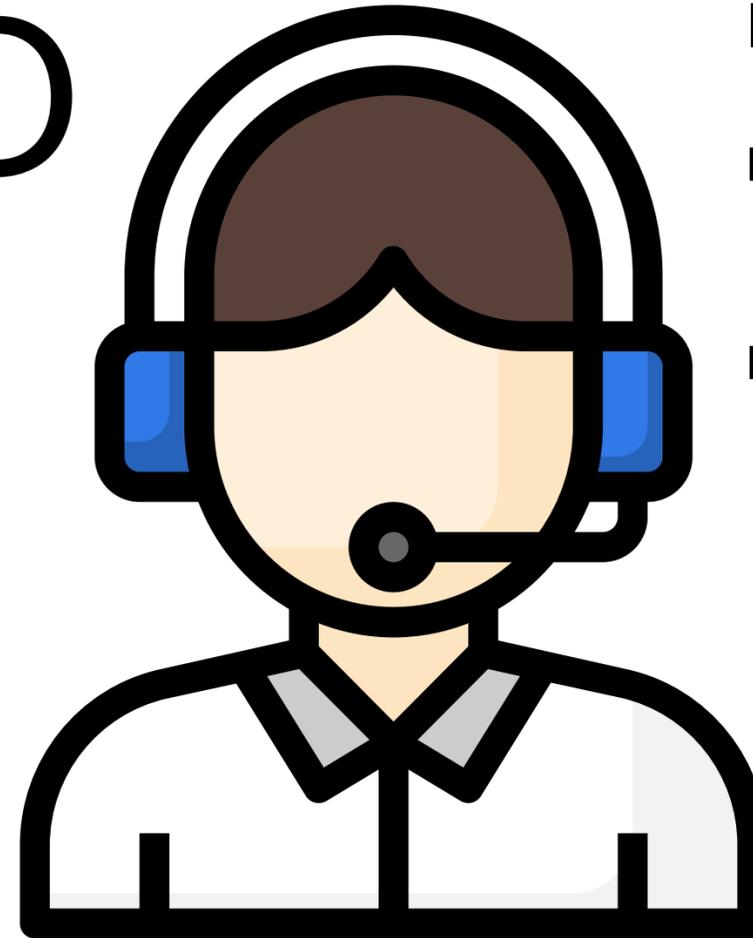


SHANNON
CORRIGAN

UNIVERSITY OF MARYLAND

LET'S GET TO KNOW YOU

A large part of research administration includes learning through experience. Creating connections and building your resource network at your own institution and others can be incredibly helpful during the proposal submission process.

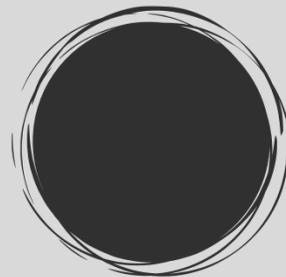


OVERALL
RATING

EXPERIENCE

POSITION

SPONSOR
EXPERINCES

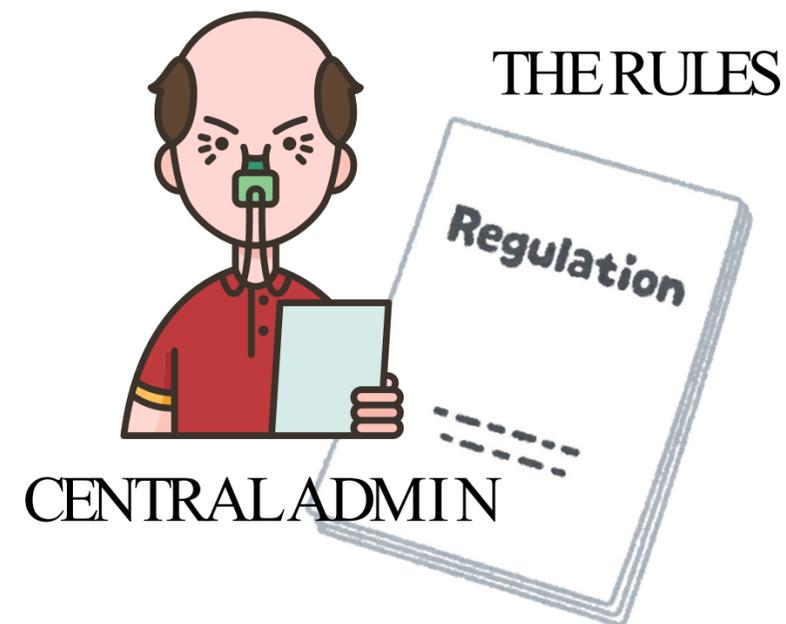
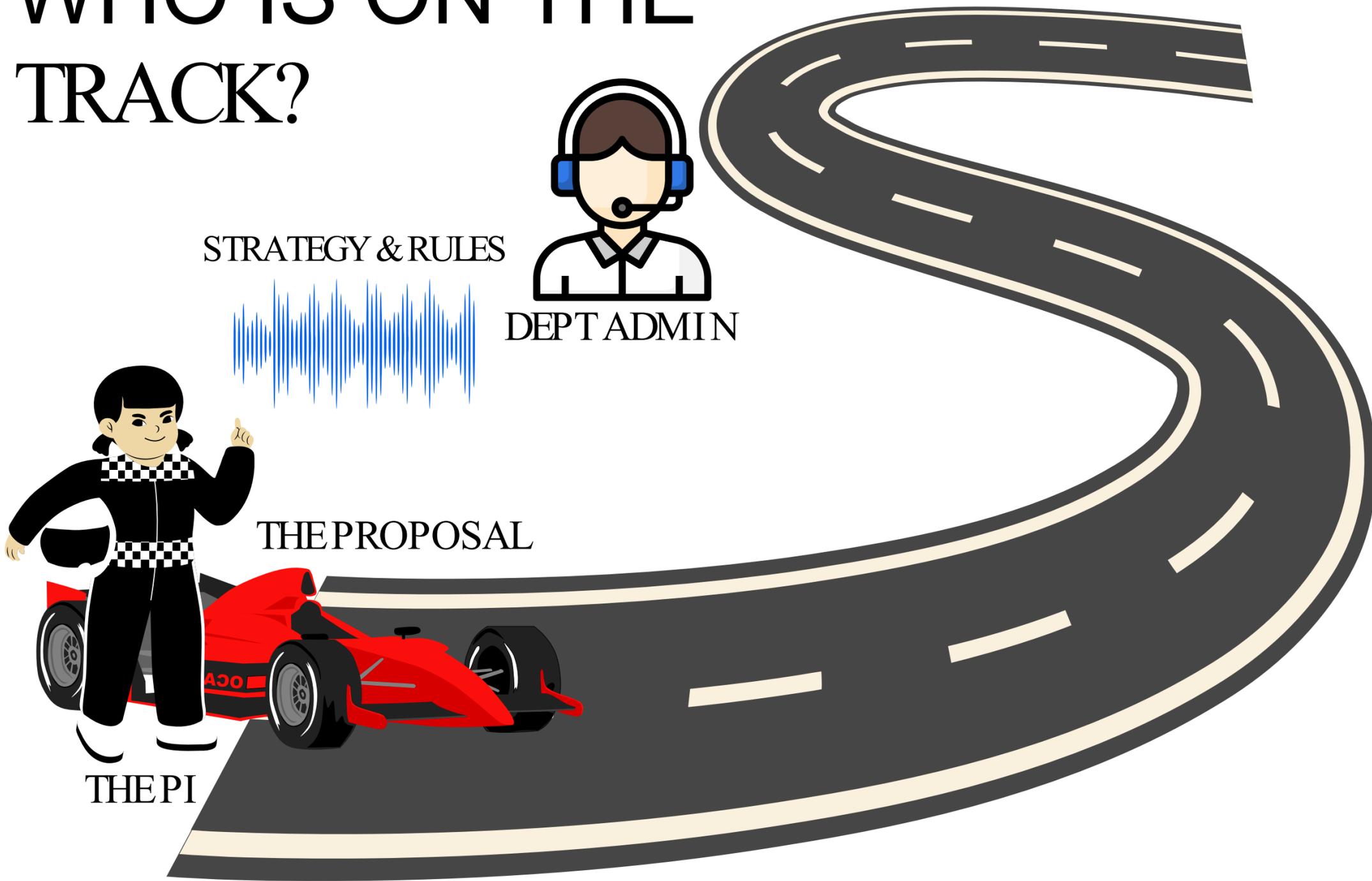


RESEARCH
ADMINISTRATOR
INSTITUTION



LET'S MEET
THE CREW

WHO IS ON THE TRACK?



WHO IS ON THE PITWALL?

Discussion



What is the best way to get them to “accept” the regulations?



Why are proposal timelines always so extensive?



Why doesn't my administrator “accept” my budget changes?



How do I get my driver to understand I'm on their team?

A Changing Regulation World

We have seen an almost constant shift in policies and regulations over the past year with the largest being put into effect this month. A new Uniform Guidance shortly after large changes from NIH and NSF brings a new realm to research administration compliance. There are numerous ways to stay up to date on changing policies, but **what is most important is actively communicating with your faculty.** We don't keep up with the day to day changes in their field of science and rely on our PIs to let us know when things are shifting that might impact funding. On the opposite end we need to let them know that in our field of research administration things are changing and it **WILL** impact their proposing and operating of research.





THERE IS ALWAYS A QUESTION
WORTH **ASKING**



does anyone have an example of.

search

Setting the Tone

We often have to remember that “the tone, cadence and delivery” of our conversations with a PI are incredibly important, because “delivering good communication is always important...imparting information clearly and quickly over team radio is simply part of the job” - Red Bull

1. Prepare an agenda, and lead the meeting with friendly conversation
2. Create space and time for questions
3. End with availability (your preferred contact) for further follow-up

Keep Channels Open

“At any given time, there might be dozens of people talking on the radio and the way to avoid chaos is to have each conversation taking place within its own group..On the other hand, there are times when the whole team needs to hear something...and plenty of people who need to have access to a whole range of channels” - Red Bull

Remember to establish clear communication channels/methods with your team and keep emails concise. When necessary, loop in other contacts (central officers, PI, department chair etc.)

When Comms Go Bad: Know the Science

“At some circuits, when it’s particularly difficult to hear, the driver will request his race engineer only pass messages in the slow corners, where ...the environment is quieter.” - Red Bull

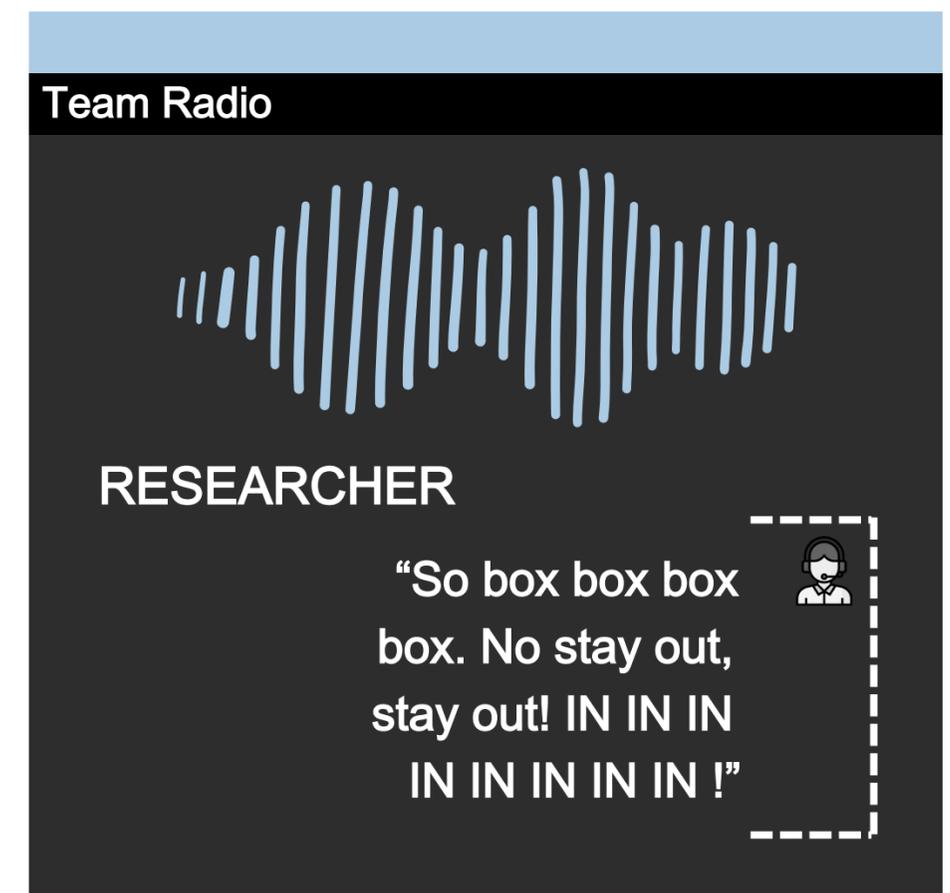
You likely will have moments where your PI is traveling, teaching or in the operating room. Aspects of the proposal can be easily drafted to save time if you are familiar with the science:

- Spend some time reviewing the PI or department’s portfolio
- Scan proposal narratives, previous SOW’s and budgets
- Get a feel for common/standard budgeted items, so you have a framework to build from

Team Radio

“You might be sharing a channel with the person standing next to you – or a group of people thousands of miles away back at the factory” - Red Bull

When we work on a proposal, often there are many stakeholders involved in the process, including several departments, sub institutions and even international collaborators. It's important to understand that precise communication is key.



Meeting With Your PI

Before a race weekend, a driver meets with their crew to discuss strategy, stakeholders, and how to deal with changes mid-race. If you can discuss with your PI before or during proposal drafting, how are you communicating - through meetings (in person or online) or through email? Understand that your style of communication changes with the medium:

- In Person - stick to your agenda, utilize Zoom or Teams to share screens for budget preparation, or come with a laptop or copies of the RFP, draft budgets and checklists for documents needed
- In Email - keep clear subject lines, break down walls of text into bullets and always provide the most recent versions of documents.

Discussion



How can I best express the regulations relevant to this proposal?



When should I start communication with my RA for proposals?



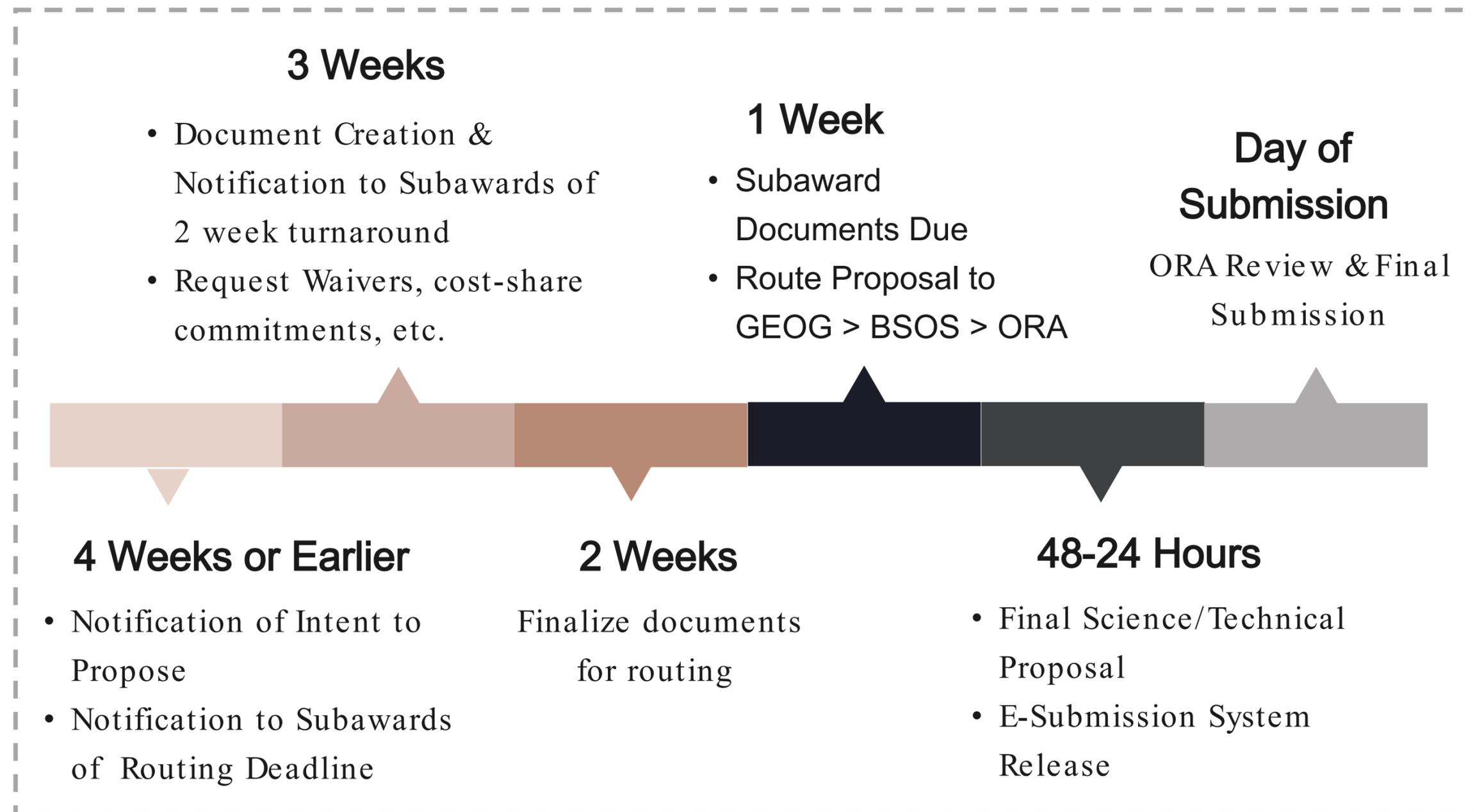
How could I better articulate my budget needs?



How can I keep communication channels open with my PIs?

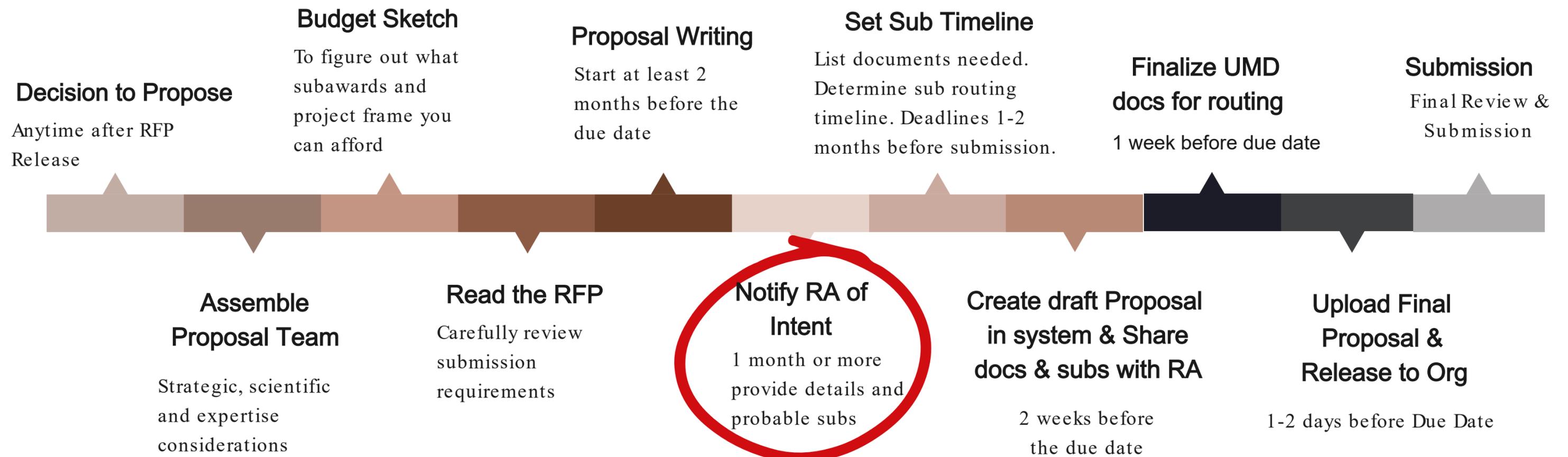
01 TIMELINE CASE STUDY: An Administrator's Timeline

In research administration our timeline starts from the moment we hear about a proposal from the PI.



01 TIMELINE CASE STUDY: Researcher's Timeline

However, it's often been in the works much longer than we realize. I asked my PI to interpret the proposal process on a timeline scale from her perspective and let me know when she starts and the steps involved. Here is what she came up with. **Where do we match up?**



How can communication help us with the timeline disconnect?

02 BUDGET CASE STUDY: A Researcher's Budget

The proposal concept is often mapped out by the time a PI approaches their RA and a rough idea of the team they plan to fund with it. The main question is “**Can the budget fund the level of science proposed?**” This is crucial to understand from the moment a PI approaches you with a proposal idea. It does neither of you any good to work on the science or the finances if the pot of money can't make it work. There are some key questions that can help facilitate active communication from both perspectives.

02 BUDGET CASE STUDY: A Researcher's Budget

Solicitation

What do we need to know? Any required science or finance pieces? A great exercise is to ask them to read and highlight pertinent information on a solicitation. This offers an opportunity to see what is important to them and what they might have missed that is important to you.

Budget

How much do we have to work with? Do we have anything we're required to cover? Are there solicitation, department, institution requirements we need to set aside funds for? What is the cost of a person?

Personnel

How many people do we need? What can we afford? Are there soft funded people we need to make sure we're covering?

Subs vs. Consultants

Who else is going to be on the project?

How can communication help us with the proposal disconnect?

A Pit Stop or A Safety Car

A pit stop is a time where the car is brought into the garage for a quick change to ensure the car reaches the finish line. A safety car is time where everyone takes a break to ensure the safety of the race.

Pit Crew

- A pit stop should occur in 2.5 seconds or less
- Around 60 pit stops are practiced each race
- Approx 22 people involved in a pit stop
- Crews switch roles often for training/education
- One member oversees the pit stop, with final say on whether the the driver can be released.

“It's like a brilliantly choreographed dance. Practiced time after time, in the build-up to a race, the crews are highly-focused. The stakes are high!” - Mercedes MG F1

Safety Car

- A physical safety car under red flag conditions
- A virtual safety car under yellow flag conditions
- Ensures safety of drivers and race crew
- Strategic opportunity for teams race placement

“The strategy group is in a continuous evaluation process, trying to anticipate what would happen if the Safety Car were to come out two, three or even five laps down the line, so that they can make the call on a pit stop as quickly as possible.” - Mercedes MG F1

We can't forget an award is our end game!

03 POST AWARD CASE STUDY Award Implementation

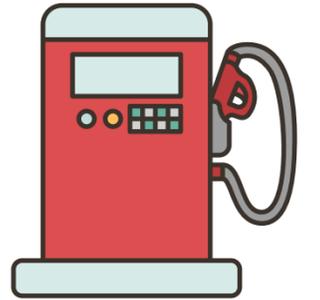
We put out far more proposals than we could feasibly receive as an institution every year, but those are the odds of the race. Sometimes your car will stop working or a crash will take you out of the race. There are even rare occurrences where team management means the proposal doesn't get the time and effort it needs to reach the podium even if it finishes the race. Even though the odds of a top finish are unknown to us at the time of submission it's important that we can actually implement what we propose. **If the award showed up tomorrow can we start work?** There are a few things to consider when putting together a proposal:



03 POST AWARD CASE STUDY Award Implementation

Personnel

Do we already have the people needed to get started? If not, how long does it take to hire someone at our institution? This is often an issue when a 2 year grant involves hiring multiple NEW post docs or grad students that they'll need to spend time finding the right candidate.



Facilities & Resources

What do we need to purchase? Is an advanced account needed to make sure we can operate?

Travel

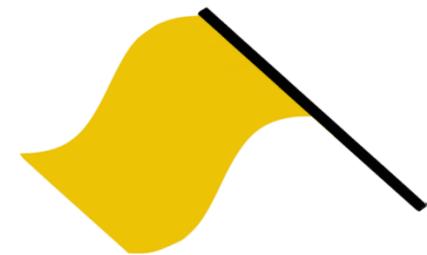
Where do we need to go? What resources are in place to support the financial burden of travel?

This can be especially important for projects with long field work. Does your institution have means to offer advances or work cards to reduce employee burden?



Sponsor Policy

Can we meet the compliance needs and checkpoints of billing and reporting?



How can a pit stop or safety car help us during proposal preparation?

Q&A

THANKYOU

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