



# Strategic Integration of AI in Research Administration: An OKR-Driven Approach for Leadership



Emory University's Private LLM ChatGPT®- Like PoC Development Journey & MS Teams bot  
Yale University's "*askYale Finance*" Chatbot and Clarity Platform

Youyou Cheng, Deputy Director, Sponsored Projects Financial Administration, Yale University  
Lisa Wilson, Interim Assistant Vice President, Office of Research Administration, Emory University



# About Lisa Wilson

- *Interim AVP, Strategic Operations & Training, Emory University*
- *25 years of leadership in the high-tech sector, specializing in carrier systems and training, and 10+ years in research and sponsored programs across public, private, and land grant universities*
- *Leads Emory's AI pilot, integrating genAI into research administration, to drive operational efficiency and data-driven decisions*
- *Skilled grant writer and fundraising professional*
- *MBA, Northwestern University; BS in Physics, Clark Atlanta University; Project Management Professional and RACC certified CRA*





# About Youyou Cheng

- *Deputy Director, Sponsored Projects Financial Administration at Yale University*
- *20 years of experience in both pre & post-award management across departments, colleges, and central offices at public and private institutions*
- *MS in International Business and MA in Television Studies.*



# Agenda & Objectives

## **Introduction to AI in RA**

AI's potential impact

## **Live Demonstrations of AI Tools**

Yale's Finance Chatbot: *"askYale Finance" bot*

Emory's RA Chatbot Pilot: *ORAgpt bot*

## **Interactive Exercises**

Creating a draft PoC Project Charter

Developing a Work Breakdown Structure for

## **Objectives and Key Results Framework**

Drafting OKRs to drive PoC success

## **Challenges & Best Practices**

Operational approaches, lessons learned, alignment

## **Future Directions and Q&A**

Emerging AI trends



# *Setting the Stage for AI in Research Administration*

Buy-in | Resources | Investment

Making a case for the ask...

# The Role of the Office of Research Administration is *Complex*

*The Case for a genAI Solution and the Need for a PoC!*



**Develop** strategic plans to maximize research funding opportunities.



**Drive** Process Improvement



**Facilitate** collaboration among faculty, researchers, and external partners.



**Advocate** for researcher needs with institutional leadership.



**Monitor** compliance and ethical standards



**Analyze** data and report trends, forecast opportunities, and inform decision-making.



**Assess** Research Administration Impact



**Implement** digital transformation initiatives in research administration.



**Support** data privacy and security in research data management.



**Optimize** the Remote Workplace Model

# *Beyond the Click: The Complex Role of Research Administrators*

## *Crafting a Compelling Case for PoC Development, Resources and Funding!*



**Promote** awareness of funding opportunities through outreach and engagement.

**Conduct** post-award monitoring to ensure adherence to sponsor guidelines.

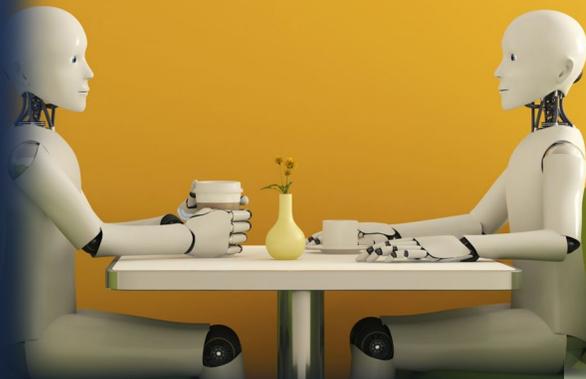
**Manage** conflict of interest (COI) disclosures to ensure transparency and compliance.

**Assist** PIs in managing discoveries, disclosures, tech transfer, and patent filings.

**Transition** seamlessly to remote work models.

**Balance** the increase in meetings and the average workday effectively.

# Why LLMs for Everyone!



## What are AI LLMs & Chatbots?

- **LLM** is an AI model trained on vast amounts of text data, enabling it to understand and generate human-like language.
- **Chatbots**, often powered by LLMs, are like your go-to, seasoned colleagues — always ready to answer questions and offer guidance, but this one never takes a coffee break!

## Why Use Chatbots in Research Administration?

- **Efficient Response to Routine Queries:** Chatbots handle frequent questions, allowing staff to focus on complex, high-value tasks like negotiating contract terms.
- **24/7 Availability:** Provide around-the-clock support, ideal for answering policy, procedure, and deadline questions.
- **Consistent Information Delivery:** This solution ensures that responses are accurate, complete, and aligned with institutional policies.

## What are the Key Benefits

- **Time Savings:** Reduces time spent on administrative tasks, increasing productivity.
- **Quality Service:** Faster responses improve service quality for faculty, researchers, and staff
- **Data-Driven Insights:** Chatbots can collect data, reveal common pain points, and guide further improvements. For example, they can identify recurring issues indicating the need for more explicit training or guidance on a subject or the need to simplify a process.

# Why Start with a Proof of Concept?



## Challenge of Explaining AI's Impact

- In 2022, AI concepts and values were abstract
- Tangible demonstration to showcase its potential benefits

## Goal

- Build a practical, ChatGPT-like AI model tailored for RA
- Test AI solutions for addressing procedures, pain points, compliance, etc.

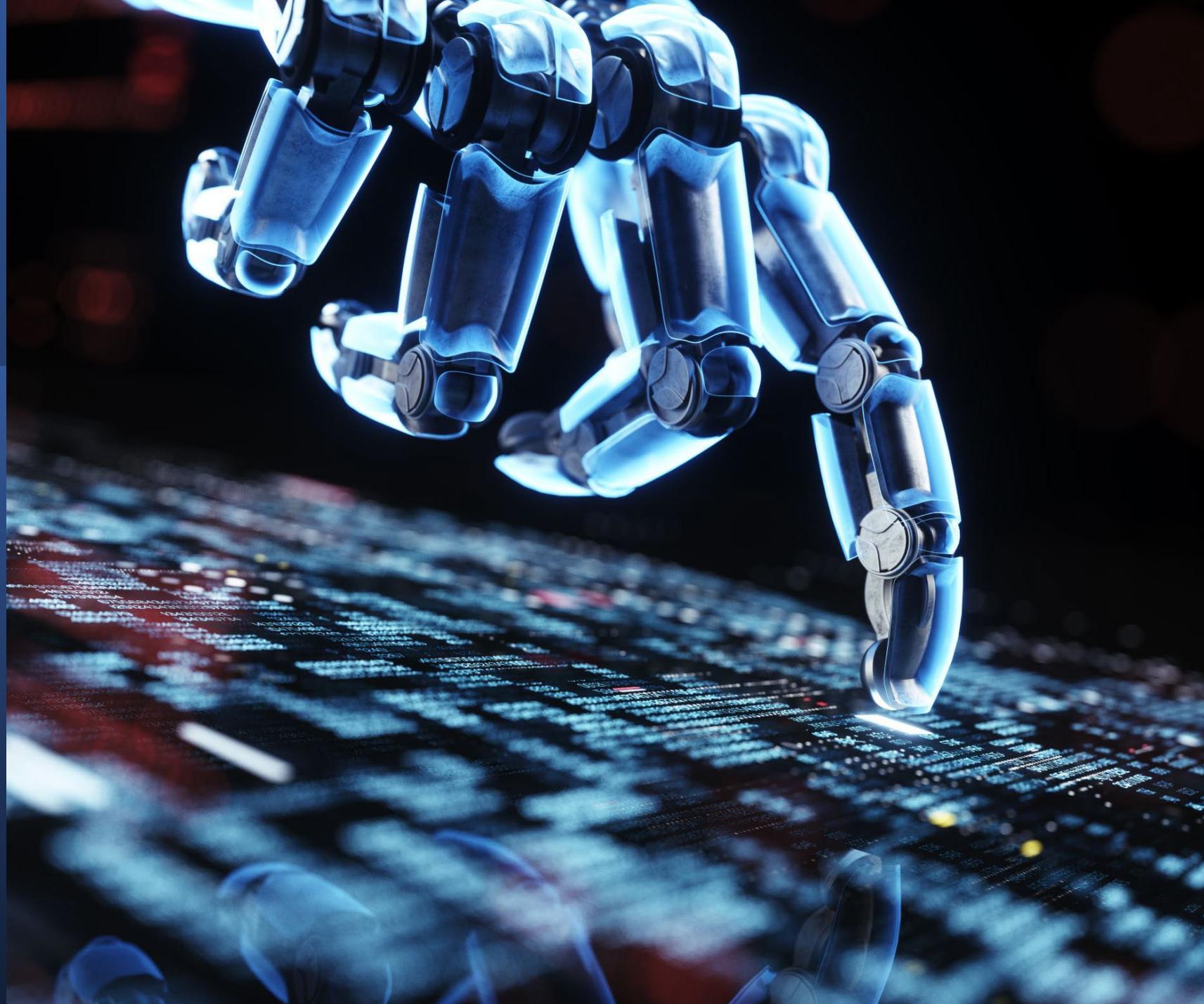
## Objectives & Key Results (OKRs)

- Demonstrate Value: Develop a compelling AI demo-secure buy-in for \$
- Identify Cases: Address real pain points in RA with AI functionalities
- Establish Feasibility: Assess resources, costs, and team needed to scale from PoC to full production
- Gain insights into architecture, platform choice, development timelines, and cost management
- Lay the foundation for creating a scalable AI solution



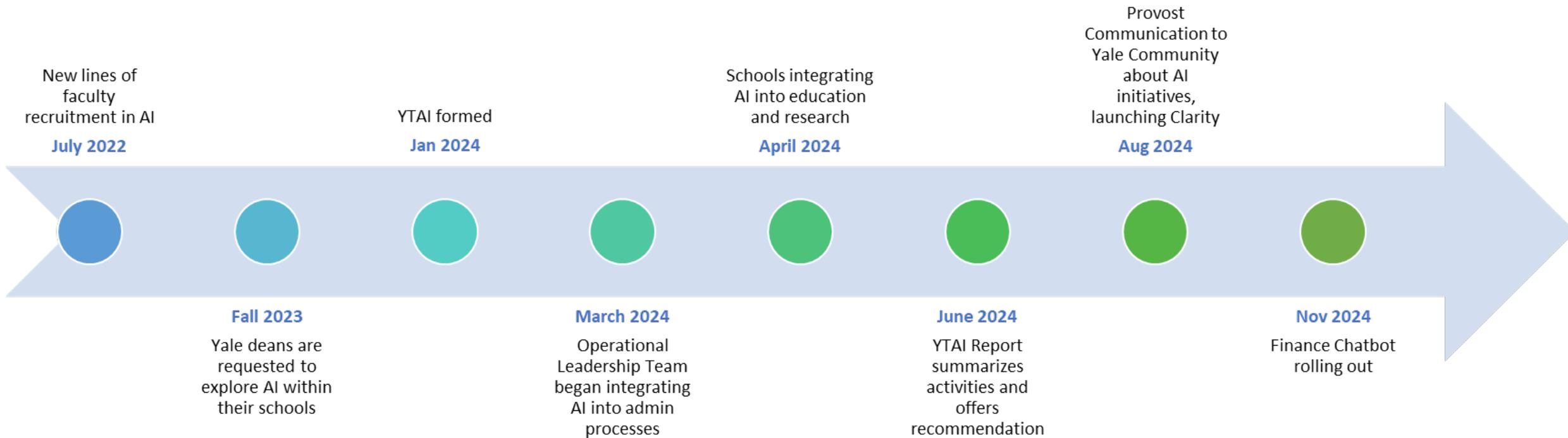
*From Concept  
to Practice*

Real-time Demos



# Yale's AI Efforts

## *A Build or Buy Decision*



# Yale's AI Tools

## *A Build or Buy Decision*

| <b>Yale Provided Tools</b>   | <b>Data Classification</b> | <b>Availability</b>         | <b>Pricing</b>              | <b>Developer Tools</b> |
|------------------------------|----------------------------|-----------------------------|-----------------------------|------------------------|
| Clarity Platform             | High                       | Staff, faculty and students | Free                        | No                     |
| Copilot with Data Protection | Moderate                   | Staff, faculty and students | Free                        | No                     |
| Adobe Firefly                | Low                        | Staff, faculty and students | Free                        | No                     |
| Zoom AI Companion            | High                       | Staff and faculty           | Free                        | No                     |
| Power BI Copilot             | High                       | Staff and faculty           | Included in premium license | Yes                    |
| Microsoft 365 Copilot        | High                       | Staff and faculty           | \$30 per user per month     | No                     |
| Teams Premium                | High                       | Staff and faculty           | \$1.88 per user per month   | No                     |
| Github Copilot               | Moderate                   | Staff and faculty           | \$19 per month              | Yes                    |
| Azure AI                     | SPA                        | Staff and faculty           | Based on usage              | Yes                    |
| AWS Q Business               | SPA                        | Staff and faculty           | Based on usage              | Yes                    |
| AWS Bedrock                  | SPA                        | Staff and faculty           | Based on usage              | Yes                    |

# Clarity Platform

Based on OpenAI GPT 4o model

Provides secure environment for moderate and high risk data

Attach one file at a time

Do not yet have ability to create high quality images

Cannot perform internet search (trained on data up to Oct 2023)

Information entered is not saved or used to train external AI models

“askYale  
Finance”

Yale’s Finance  
Chatbot & Demo

Yale University

## askYale Finance Beta

### Finance Chatbot Beta Version

*Chatbot answers questions about Yale policies, procedures, and other content. As a Generative AI, the Chatbot’s responses may contain errors or omissions. Users are responsible for verifying the accuracy and comprehensiveness of information provided. The chatbot should not be relied upon in place of the latest published policies and procedures on It’s Your Yale or for your unit. When in doubt, consult the experts (e.g., business offices or central process owners).*

[Launch Finance Chatbot](#) >

how can i set up a new supplier?



References:

[1 Citation 1](#)

[2 Citation 2](#)

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To set up a new supplier at Yale University, follow the steps outlined in Procedure 3401 PR.01. Here is a summary of the process:

### 1. Determine Whether the Supplier Already Exists in Workday:

- Run the "Find Suppliers – Yale" report in Workday to check if the supplier already exists.
- If the supplier does not exist, proceed to the next step.
- If the supplier exists but the information is incorrect, proceed to request changes to existing supplier information (<sup>1</sup>).

how can i set up a new supplier?



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# Yale Lessons Learned

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## **The time to act on AI is NOW:**

According to BCG, Gen AI unlocks 10-15% productivity gains in everyday tasks, and 30-50% efficiency improvement in critical functions

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## **Focusing on improving AI literacy:**

Majority staff heard of AI but haven't used or don't know how it works (67%)

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## **Positive sentiment toward AI among staff:**

Only 10% feel “somewhat negative” about AI; 38% fell “very positive” and excited about the possibilities of AI.

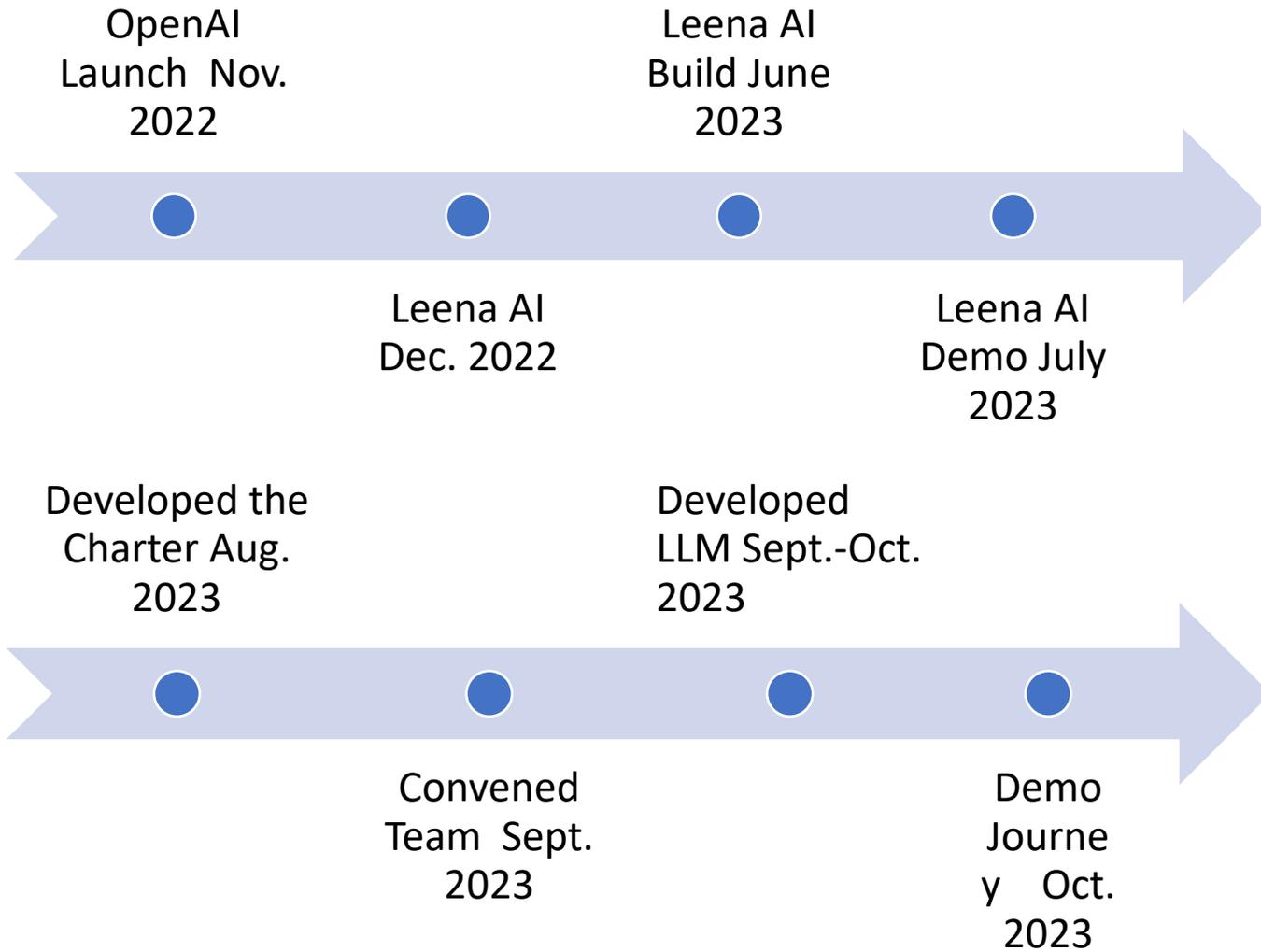
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## **Addressing Concerns:**

Main concerns are on data security, lack of control over AI and replacing human jobs.

# Emory's Journey

*A Build or Buy Decision*



Exploring the Pathway to Purchase:  
*A Consultant Approach...*

2023 Proof of  
Concept  
Development  
Videos



Building In-House:  
*A Collaborative Journey*

# Emory's AI Chatbot Developed with Leena AI

## Launch Demo

Emory's AI Chatbot interface showing a navigation menu on the left and a chat window on the right.

**Navigation Menu:**

- Home
- Policy Hub
- Raise Ticket
- My Tickets

**Chat Window:**

Hi! I am **Ask Emory!** Your AI powered virtual assistant.

I can help you with the following:

- Policy Hub:** Click here
- Social Media:** Click Here
- Raise Ticket/Requests:** Raise Ticket

Type a message...

Powered By **Leena AI**



## Goto MS TEAMS Tab - Demo

# Emory's ORA Chatbot Demo in Microsoft Teams

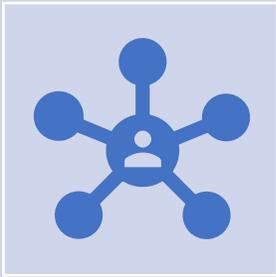
Developed with MS  
Copilot

The screenshot shows a Microsoft Teams chat window titled "ORAgpt test 1". The chat history includes a user message: "Give me a checklist of the award closeout process." (10:35 AM). The chatbot (ORAgpt test 1) responds at 10:36 AM: "The award closeout process checklist typically includes tasks such as reviewing posted transactions, verifying final financial reports or invoices, ensuring completion of contractor's release, confirming F&A expenses, checking subcontract balances, reviewing final expenditures, and submitting all required documents to the sponsor 1." A "More details" button is visible. The chatbot then provides a detailed checklist at 10:36 AM:

- 1. Reviewing Compass GL to verify award-related transactions 1.
- 2. Ensuring completion of final FSR or invoice milestones 1.
- 3. Verifying contractor's release if required by the sponsor 1.
- 4. Reviewing F&A to ensure correct expense reporting to the sponsor 1.
- 5. Confirming subcontract and subaward balances accuracy 1.
- 6. Matching final expenditures with the final financial report or invoice 1.
- 7. Ensuring all invoices are processed and submitted to the sponsor 1.
- 8. Verifying appropriate revenue recognition and posting to the GL 1.
- 9. Utilizing OnBase for imaged copies of final invoices or FSRs 1.
- 10. Checking FNA calculation for direct charges tolerance 1.
- 11. Confirming cash receipt and correct application to the award 1.
- 12. Updating Compass System pages to indicate final submissions 1.
- 13. Inactivating SpeedType and closing the award in Compass 1. These steps are crucial for a thorough and compliant closeout process of sponsored program awards.

The chat interface includes a search bar at the top, a left-hand navigation pane with icons for Activity, Chat, Teams, Assignments, Calendar, Calls, OneDrive, and Apps, and a message input field at the bottom with a "Type a message" placeholder and various icons for emojis, attachments, mentions, and actions.

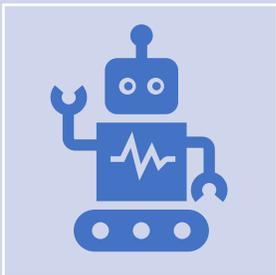
# Emory's RA Pain Points and AI-Use Cases



## Pain Points

New RAs were **frustrated** with the time it takes for colleagues and peers to answer their questions about **how to** perform role-specific tasks.

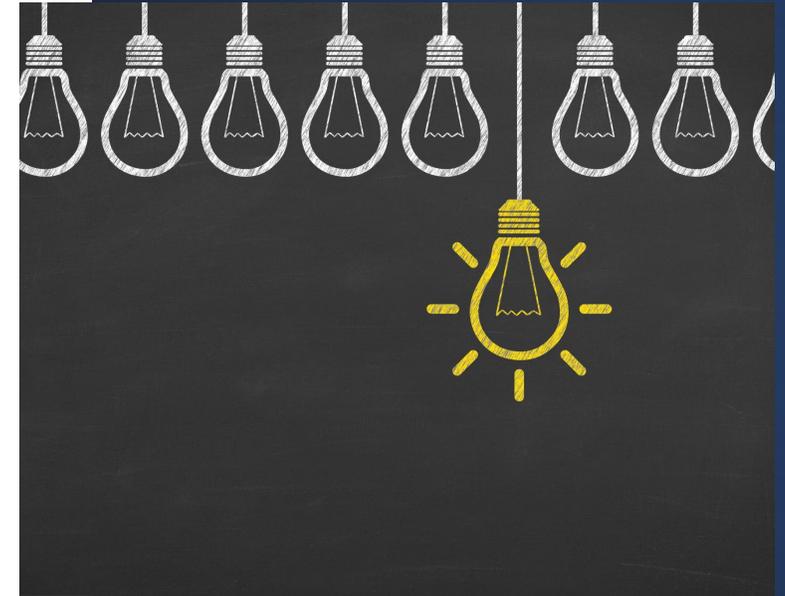
**90 Dated SOPs** - development is time-consuming. Outsourcing is cost-prohibitive.



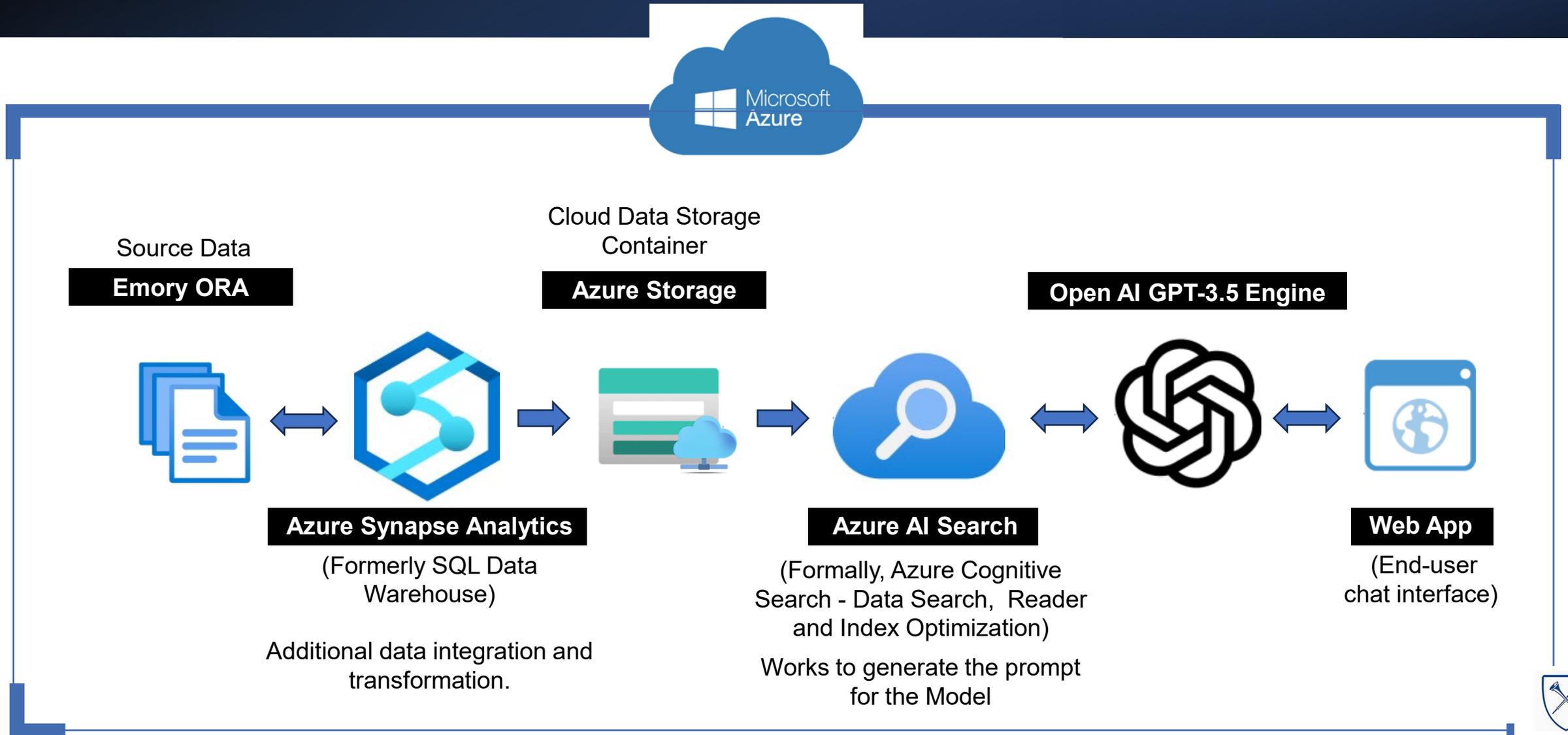
## Solutions & Use Cases

A **virtual assistant** that provides instantaneous process and procedure **answers 24/7**.

**Document generation** - a bot that assists RAs in revising or writing new SOPs.



# Proof of Concept Architecture for AI Integration Using MS Azure



# Proof of Concept Architecture for AI Integration Using MS Azure

Microsoft Azure

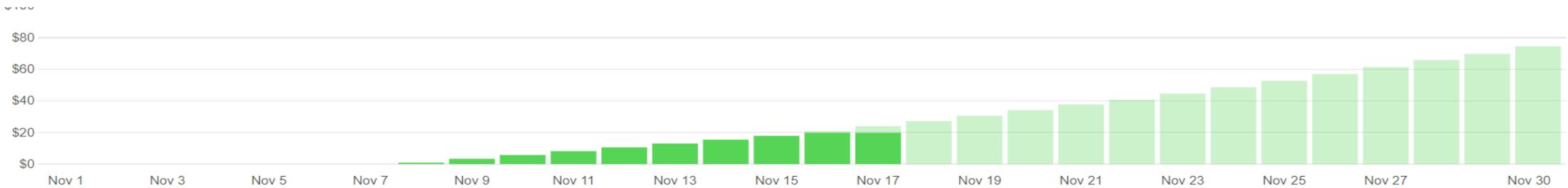
Home > Pilotgrp1

 **Pilotgrp1 | Cost analysis**   

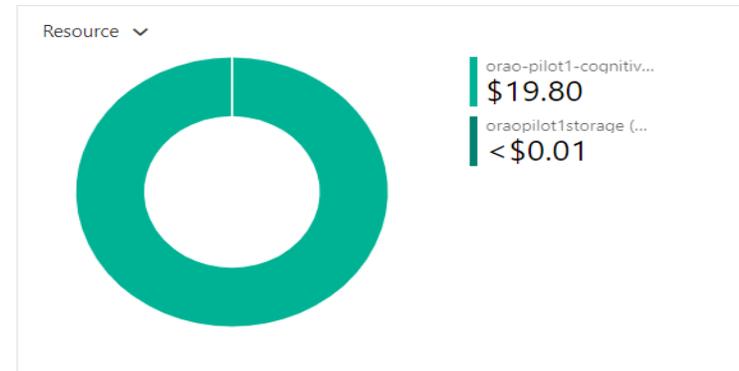
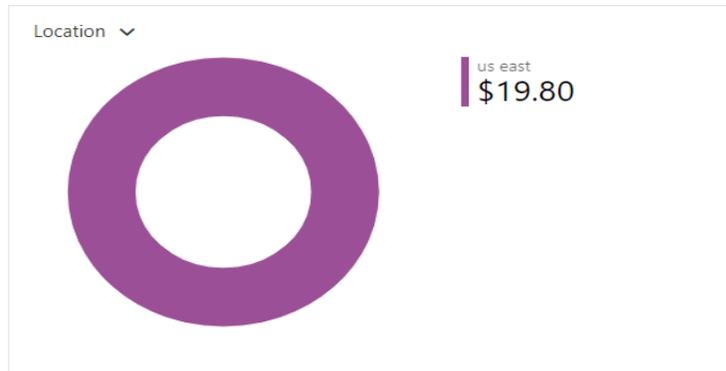
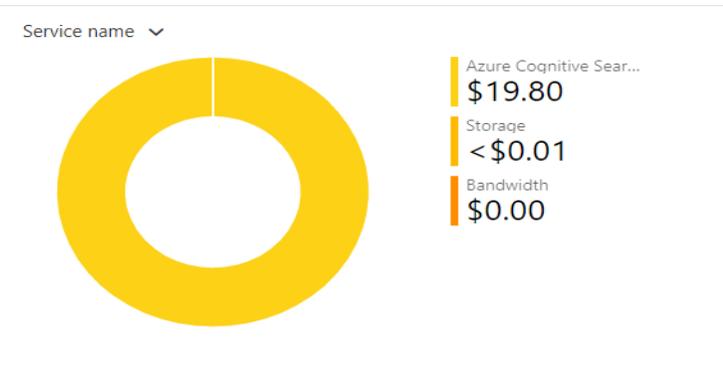
 Save  Save as  Delete view  Share  Subscribe  Refresh  Download  Cost by resource  Configure resource group  Try preview  Help

ACTUAL COST (USD)  **\$19.80**   
FORECAST: CHART VIEW ON  **\$74.50**   
BUDGET: NONE 

Group by: **None**  Granularity: **Accumulated**   **Column (stacked)** 



 Accumulated cost  Forecast cost



# Meet the Team Behind the PoC: Learning Through Experience



Office of Research Administration | Optim...





# TEVV System Responses

Testing | Evaluating | Validating | Verifying

## How did our bot perform?

POC Q&A bot response document

[https://docs.google.com/spreadsheets/d/1zdTv6nPIW\\_vSyHiy4gA43g-Xer4Moh02W9th7Mdr0hA/edit](https://docs.google.com/spreadsheets/d/1zdTv6nPIW_vSyHiy4gA43g-Xer4Moh02W9th7Mdr0hA/edit)

Comprehensive, formal evaluation and analysis will be in the next phase



Azure AI search



# Emory's Lessons Learned

- Gauge organizational readiness
- Adapt to the rapidly changing AI market
- **Benchmark everything, establish core KPI or OKRs**
- **Develop a division-level knowledge repository-vet everything**
- **Build digital and AI talent; develop in-house talent**
- Keep humans in the loop; leverage your SMEs (RA & IT)
- **Tap project management professionals**
- Strive for an exceptional user experience!



# *Building a Proof-of-Concept for AI in RA: A Toolkit*

- Writing your charter
- Drafting your objectives and key results
- Developing your work breakdown structure implementation plan

# Handout and Exercise #1

## Drafting a Charter for an AI PoC



- **Focus:** The Project Charter Template
- **Activity:** As we progress through each section of the slides, fill out the corresponding sections of the template provided.
- **Goal:** By the end of the exercise, you will have a draft charter tailored to your project needs.

# Defining the Scope: What's Included in the Training Data? What's Not?

## In Scope

- ❑ Internal Documents relevant to the use cases; a subset of the ORA Knowledge Repository:
  - **SOPs, checklists, job aids**
  - **Policies**
- ❑ External Documents
  - ❑ 2 CFR 200 – Uniform Guidance
  - ❑ NSF PAPPG and NIH guidelines

## Out of Scope

- Confidential, Sensitive, Proprietary, Private
- Personally Identifiable Information (PII)
- Proposals, Awards, IP
- Integration of third-party applications
- Access to the Internet knowledge



# Drafting Your Project Charter

## Office of Research Administration Chatbot Proof-of-Concept Project Charter

**Project Name:** ORA Large Language Model (LLM) and Chatbot Proof-of-Concept

**Project Co-Leads:** Davion Johnson, Strategic Operations Associate, SOT (Strategic Operations and Training); Tubal Yisrael, Project Support Specialist, SOT

**Project Sponsor:** Lisa Wilson, Sr. Director, Strategic Operations & Training, ORA

**Project Collaborators:** Benn Konsynski, Professor, Goizueta Business School, and Students of Benn (SOBs)

**Charter Prepared By:** Lisa Wilson, Sr. Director, SOT

**Start Date:** August 22, 2023

### Project Manager/Lead Responsibilities

The project lead and manager are responsible for:

1. **Ensuring Charter Alignment:** Confirming that all activities align with the scope outlined in the Charter.

5. **Tracking Progress:** Monitoring task completion and providing updates on project progress.

### Purpose

This project will develop an ORA Chatbot using a large language model drawn from the ORA knowledge repository. The aim is to validate the feasibility and benefits of integrating an LLM-backed chatbot into ORA operations. The Chatbot will provide virtual assistant services that will quickly answer research administration queries and aid in updating and drafting policies, guidelines, SOPs, and training resources. This will significantly reduce time on tasks, enhance staff productivity, and streamline efficiency, positively transforming our operations.

### The Need | Pain Points

- **Delayed Responses:** New hires experience significant delays in getting answers to unit, role, or task-specific questions.
- **Prolonged Learning Curve:** Mastery of systems, policies, and procedures exceeds 180 days, hindering productivity.
- **Inefficient SOP Updates:** Internal updates to standard operating procedure manuals are slow, and outsourcing is prohibitively expensive.
- **Slow Policy Development:** Updating or creating new policies is time-consuming.
- **Critical Need for RAS:** Research Administration Services is the top priority.

Lisa Wilson, Sr. Director, Strategic Operations & Training – December 2023 - Final pg. 1

### Use Cases

The ORA Chatbot can be employed in various real-world scenarios, including:

1. **Virtual Assistant:** Provides instant responses to unit, role, task, or system-specific queries.
2. **Document Generation:** Creates original content for new Standard Operating Procedures (SOPs), policies, training materials, and job aids.
3. **Productivity Enhancement:** Significantly reduces task completion time and boosts overall efficiency.
4. **Proof of Concept:** Assists in evaluating build vs. buy decisions.

### Deliverables

- **ORA Knowledge Repository:** A collection of SOPs, process maps, policies, job aids, and training materials.
- **ORA Virtual Assistant:** An AI-powered assistant similar to ChatGPT and a text generation tool.
- **AI Panel Session:** A concurrent session at RW23 focused on AI applications.
- **Prompt Engineering Master Class:** Training for research administrators on effective prompting techniques.
- **Implementation Plan:** A detailed plan developed in PPM (Project Portfolio Management) Pro.
- **New RA Operations Model:** A revised business model for research administration operations.

### Scope

#### In-Scope

- ORA's guidelines, job aids, training materials, policies, and SOPs.
- New grants management system training documents in the next phase.
- Uniform Guidance, National Institutes of Health (NIH), and National Science Foundation (NSF) PAPPG
- 

#### Out of Scope

- Other federal agency and industry applications and data sources (e.g., BioRaft or OnBase).
- Confidential, sensitive, proprietary, proposal, award, intellectual property content, and personally identifiable information (PII).
- Robotic Process Automation (RPA).

Lisa Wilson, Sr. Director, Strategic Operations & Training – December 2023 - Final pg. 2

### Risks and Mitigation

The potential risks of building a proof-of-concept LLM are minimal.



# Handout and Exercise #2

## Developing a PoC Implementation Plan with a WBS



- **Focus:** The Project Charter Template
- **Activity:** As we progress through each section of the slides, fill out the corresponding sections of the template provided.
- **Goal:** By the end of the exercise, you will have a draft charter tailored to your project needs.

# From Planning to Execution: Snapshot of the PoC Implementation Plan

| Title   | % Complete | Start Date        | Target Date       |
|---|------------|-------------------|-------------------|
| ▼ FY23 Project Initiation                                     | 100.00%    | 7/31/2023 9:00 AM | 8/2/2023 5:00 PM  |
| <u>Create Project Charter</u>                                 | 100.00%    | 7/31/2023 9:00 AM | 8/2/2023 5:00 PM  |
| Define the project's objectives and scope                     | 100.00%    | 7/31/2023 9:00 AM | 7/31/2023 5:00 PM |
| Define End User and high-level use case                       | 100.00%    | 7/31/2023 9:00 AM | 7/31/2023 5:00 PM |
| Define the high-level requirements for the Chatbox            | 100.00%    | 7/31/2023 9:00 AM | 7/31/2023 5:00 PM |
| Set up the project team, including roles and responsibilities | 100.00%    | 7/31/2023 9:00 AM | 8/2/2023 5:00 PM  |

|   |         |                    |                    |
|---|---------|--------------------|--------------------|
| ▼ Phase 1 (Student Build)                                     | 100.00% | 7/31/2023 9:00 AM  | 10/20/2023 5:00 PM |
| ▶ <u>Requirements &amp; Design Phase (exploration)</u>        | 100.00% | 9/14/2023 9:00 AM  | 9/27/2023 5:00 PM  |
| ▶ Development Phase   | 100.00% | 7/31/2023 9:00 AM  | 10/20/2023 5:00 PM |
| ▶ <u>Model Training Phase</u>                                 | 100.00% | 7/31/2023 9:00 AM  | 10/20/2023 5:00 PM |
| ▶ Testing and Quality Assurance Phase                         | 100.00% | 10/13/2023 9:00 AM | 10/20/2023 5:00 PM |
| ▶ Deployment Phase  | 100.00% | 9/27/2023 9:00 AM  | 10/20/2023 5:00 PM |
| ▶ <u>Create short film of the demonstration and query I/O</u> | 100.00% | 7/31/2023 9:00 AM  | 10/20/2023 5:00 PM |
| ▶ <i>User Training, Demo, and Documentation</i>               | 0.00%   | 8/23/2023 9:00 AM  | 12/31/2023 5:00 PM |

*How-to manual*

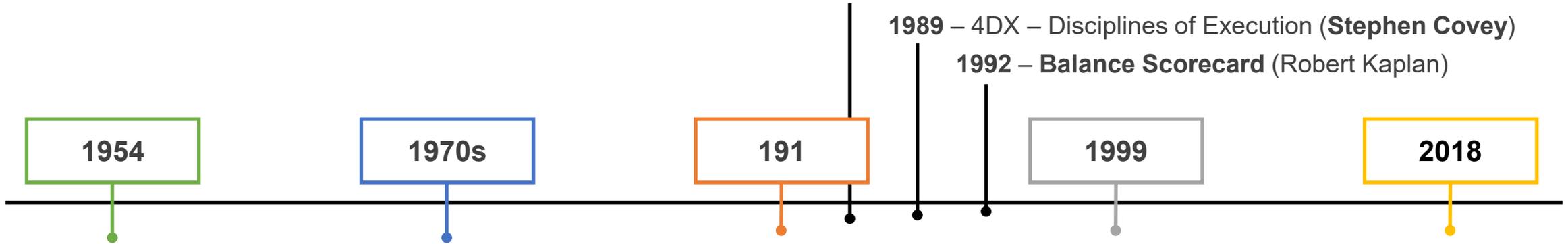


*Foundation of OKRs in Research Administration*

The 1980s – Key Performance Indicators (KPIs) are widespread

1989 – 4DX – Disciplines of Execution (Stephen Covey)

1992 – Balance Scorecard (Robert Kaplan)



1954

1970s

1991

1999

2018

**MBOs**

Peter Drucker  
The Practice of  
Management

**OKRs**

Andy Grove, CEO  
**Intel**  
John Doerr

**S.M.A.R.T. Goals**

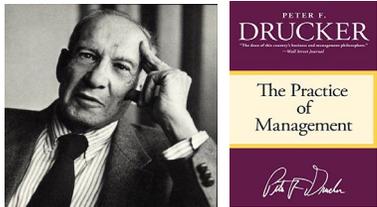
George T. Doran  
There's a SMART Way to  
Write Management Goals  
and Objectives

**Google Adopts OKRs**

John Doerr  
Larry Page  
Google

**OKRs become the  
Goal-setting Standard**

John Doerr  
Measure What Matters



“It doesn’t matter what you know. It’s execution that matters most.” ~ **Andy Grove**

# The History of Business Management Frameworks.

# Defining OKRs and Their Relevance in AI Projects



## What are OKRs?

**Objectives:** Describe the *what*—a clear, broad goal that provides direction and purpose.

**Key Results:** Define the *how*—specific, measurable outcomes that track progress toward the objective.



## Why Use OKRs for AI Projects?

**Align Goals with Institutional Strategy:** Ensures that AI initiatives directly support organizational objectives.

**Create Measurable Success Metrics:**  
**Establish clear targets** for evaluating project impact, which is essential in early AI initiatives.

**Enhance Focus and Accountability:** Helps teams prioritize projects, concentrate on defined outcomes, and track progress regularly.



## Example OKR for Emory's AI PoC

**Objective:** Demonstrate the value of an AI solution for research administration.

### Key Results:

- Develop a functional PoC by Q2.
- Present PoC to senior leadership and secure approval for production scaling.
- Gather 90% positive feedback from pilot users on PoC usability.

# George Doran coined the term “SMART Goals.”

## Reference

Doran, G.T. (1981) There’s a SMART Way to Write Management’s Goals and Objectives. Journal of Management Review, 70, 35-36. - References - Scientific Research Publishing

|          |   |
|----------|---|
| <b>S</b> | <b>SPECIFIC</b><br>When setting a goal, be specific about what you want to accomplish.<br>                          |
| <b>M</b> | <b>MEASURABLE</b><br>Your goal should have concrete criteria for measuring progress and reaching the end goal.<br> |
| <b>A</b> | <b>ATTAINABLE</b><br>Your goal should be realistic and possible for your team to reach.<br>                        |
| <b>R</b> | <b>RELEVANT</b><br>Your goal should matter to your business and address a core initiative.<br>                    |
| <b>T</b> | <b>TIMELY</b><br>Your goal should matter to your business and address a core initiative.<br>                     |

# Example #5: Cascading OKRs

## Top-down and bottom-up



Arthur Blank  
says...

**GENERAL MANAGER**  
Terry Fontenot

---

**"Make more money for owners"**

**KR1: Win Super Bowl**  
**KR2: Fill stands to 88%/game**

**HEAD COACH**  
Arthur Smith

---

**Obj: Win Super Bowl**

**KR1: Average 200 passing yds/game**  
**KR2: Become 3<sup>rd</sup> ranked defense in NFL**  
**KR3: Average a 25yd punt return/game**

**HEAD OF PUBLIC RELATIONS**  
HR, Marketing & Sales

---

**Obj: Fill stands to 88% per game**

**KR1: Hire three dazzling players**  
**KR2: Get 2 Monday night games**  
**KR3: Promote key players**

# Handout and Exercise #3

## Draft your AI in RA OKRs



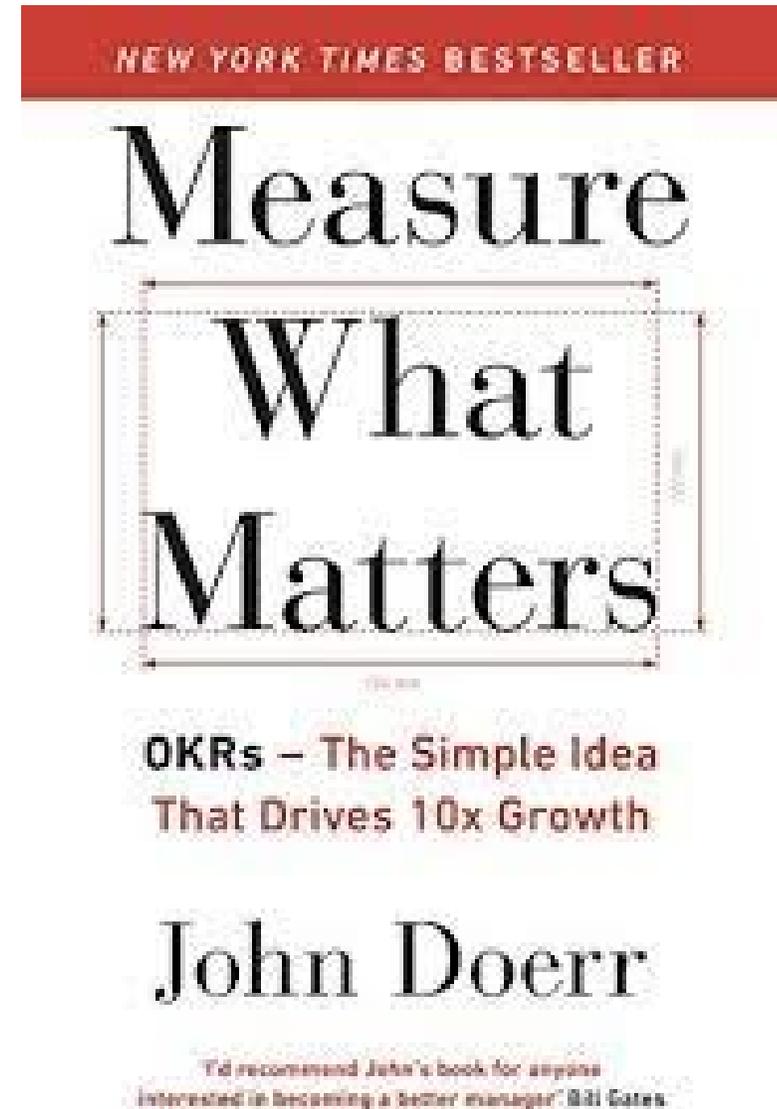
- **Focus:** Define one objective and desired outcomes (key results) of your AI PoC
- **Activity:** Outline your action steps
- **Goal:** By the end of this session, you will have one clear OKR tailored to support your project's success.

# Objectives & Key Results

Adopting a Performance Management System Proven to Engage Employees and Drive Organization Growth

Lisa Wilson, Sr. Director, Strategic Operations & Training,  
Office of Research Administration (ORA)

April 2023





# Emerging AI Trends and Strategies for Scaling AI Projects

# Questions and Answers

Yale *Finance*



# Closing Remarks and Contact Information



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Thanks for Joining Us!