Sponsored Programs On Boarding Plan

New OSP employees participate in a one-year training plan, in order to support successful orientation, training and development. The twelve month training plan includes performance check points at the 3, 6, 9 and 12-month review periods. The initial 8 to 10 days will consist of one-on-one training.

The expectations outlined are what will be expected of the administrator during the 3, 6, 9, and 12 month review period. Should you fail to meet the established performance expectations as defined in your training plan, you may be subject to disciplinary action at that time, including immediate termination.

During this period it is anticipated that the administrator will encounter several scenarios that will give them exposure and experience with the everyday functions of OSP.   It is the responsibility of the administrator to maintain training notes and continue to add to their collections of notes, handouts, and examples as new occurrences arise.

The following plan will be used to give you an idea of the information to be covered and what is expected of you over time as you continue to work, learn, and grow within the Office of Sponsored programs.

Administrator: _____

Supervisor: _____

NEW STAFF
The First Two Weeks and Future Milestones

Day 1		
TIME	**Activity**	**Topics**
8:15 - Noon	Initial Orientation such as Title IX	Human Resources
1:00 – 2:00 PM	*Obtaining UAH decal and charger card*	*OSP staff will provide point of contact and location on where to obtain their decal and charger card, if HR did not provided this information during the initial training.*
2:00 – 4:00 PM	Office Expectations/Process	• *Tour of office and E-Wing* • Work hours, leave usage, and leave request • Attire • Discuss probationary period • Access to server and email if available • *Set up voicemail** • Professional Development • Review and sign Bylaws • *Identify needed office supplies* • Banner
4:00 – 5:00 PM	Independent Time	Explore OSP website

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The First Two Weeks and Future Milestones

TIME	Activity	Topics
9:30-10AM	Overview	Debrief activities from previous day
10:00AM – till complete	Introduction to the SRAI Modules	• Discussion on the SRAI modules • Provide information on which modules to complete. o Principles in Pre-Award Research o Principles in Proposal Development o Principles of Post award Administration
	SRAI Modules	Complete SRAI Modules
	RCR Training	• Complete the RCR for All researchers and Export Control in CITI.

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The First Two Weeks and Future Milestones

TIME	Activity	Topics
8:45 – 9:00 AM	Welcome and Overview	Debrief activities from previous Day
9:00 – 12:00 PM	Proposal Development Introduction	• What is proposal development (policies and UAH procedures) • Discuss different agencies • What is solicitation, RFP, RFQ, RFI, NOI • Roles and responsibilities or OSP and PI • Provide Acronym sheet • Provide proposal checklist, desk guides and guides on how to set up hard copy and electronic folders. • Uniform Guidance
12:00 – 1:00 PM	**Break**	**Lunch**
1:00 – 2:30 PM	Solicitation Review (NSF and NASA)	Provide a solicitation from NSF and NASA to demonstrate what OSP looks for and why in the solicitation, how to complete the Proposal Checklist, what is the PI's responsibility during proposal development.
2:30 -4:30	Solicitation Review (NIH and DoD)	Provide a few solicitations from NIH and DoD to demonstrate what OSP looks for and why in the solicitation, how to complete the Proposal Checklist, what is the PI's responsibility during pre-award.
4:30 – 5:00 PM	Independent Time	Make sure all note taking is ready available and tabbed correctly based on the information from Day 2.

NEW STAFF
The First Two Weeks and Future Milestones

TIME	Activity	Topics
8:45 – 9 AM	Welcome and Overview	Debrief activities from previous day
9:00 – 12:00 PM	Proposal Development (continued)	- Budget Development. Understanding how to prepared UAH proposal budget. - How to search for resources to help prepare the UAH budget. **Lunch**
12:00 – 1:00 PM	**Break**	
1:00 – 4:30 PM	Proposal Development (continued)	Continue Budget practice to solidify understanding of the formulas used. Several budget scenarios may be issued to ensure understanding of concepts and assess ability to operate in Excel.
4:30 – 5:00 PM	Independent Time	Make sure all note taking is ready available and tabbed correctly based on the information from Day 3.

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The First Two Weeks and Future Milestones

	Day 5-6	
TIME	**Activity**	**Topics**
8:45 – 9 AM	Welcome and Overview	Debrief activities from Day 3.
9:00 – 12:00 PM	Proposal Development (continued)	• Training on Kuali's proposal development. Understanding and playing in sandbox of Kuali by using the available resources. • How to double check the information entered in the agency's portals for compliance (if time permits). • Explain the procedures for how to save and file proposals once they have been submitted to the agency.
12:00 – 1:00 PM	**Break**	**Lunch**
1:00 – 2:00 PM	Proposal Development (closing)	Debrief on the importance of Sponsored Programs for pre-award actions. Debrief on agency's solicitations, guidelines, and portals. Debrief on UAH's proposal development procedures, UAH budget preparation, and entering information into Kuali.
2:00 – 4:30 PM	Pre-Award Introduction	• What is pre-award (policies and UAH procedures) • Discuss prior approval matric for different agencies • Provide information on difference between grants, CA, and contracts • Roles and responsibilities or OSP and PI • Provide Acronym sheet • Provide DAS, desk guides and guides on how to set up hard copy and electronic folders. • Uniform Guidance
4:30 – 5:00 PM	Independent Time	Make sure all note taking is ready available and tabbed correctly based on the information from Day 4.

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The First Two Weeks and Future Milestones

Day 6-7		
TIME	**Activity**	**Topics**
8:45 – 9 AM	Welcome and Overview	Debrief activities from Day 4.
9:00 – 12:00 PM	Pre-Award Development (continued)	• Review and explain what OSP looks for in Grants, CA, and contracts. • Provide an example of each to show the difference. • Explain OSP procedures for processing new awards (the steps) • Review and explain the significance of the internal pre-award documents.
12:00 – 1:00 PM	**Break**	**Lunch**
1:00 – 4:30 PM	Pre-Award Development (continuation)	• Discuss the significance of terms and conditions. • Explain the purpose of certifications and reps. • Provide the contract clauses that UAH cannot accept information, and explain the reasoning why UAH cannot accept those clauses. • Provide an actual contract and discuss the terms and conditions, certs and reps, and any other agency document that has to be completed prior to an award.
4:30 – 5:00 PM	Independent Time	Make sure all note taking is ready available and tabbed correctly based on the information from Day 5.

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The First Two Weeks and Future Milestones

Day 7-8		
TIME	**Activity**	**Topics**
8:45 – 9 AM	Welcome and Overview	Debrief activities from Day 5.

9:00 – 12:00 PM	Pre-and Post-Award Development	• Review the pre-award process based on the information from Day 6.
		    o Do a Pre-award Exercise
		        ▪ Agency Budget
		        ▪ Multiple Choice Quiz
		        ▪ General Q &A
		
		• Discuss Kauli from a post-award aspect.
		• Enter one or two of the awards discussed on Day 5 into Kuali sandbox.

12:00 – 1:00 PM	**Break**	**Lunch**
1:00 – 4:00 PM	Overview of both pre and post award	• Review information and notes from the pre-award and post-award trainings. • Work on an actual project from proposal to completing and setting up an award in Kuali. • Explain modifications to an existing award (if time permits)
4:00 – 4:45 PM	Other documents	• Introduction to other documents that OSP has to process that fall outside of the pre and post award steps (risk memos, travel, F&A waiver forms, blanket travels, etc.)

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The First Two Weeks and Future Milestones

Day 8-9		
TIME	**Activity**	**Topics**
8:45 – 9 AM	Welcome and Overview	Debrief activities from the previous day.
9:00 – 12:00 PM	Other documents/ Roles and Responsibilities	- Go into depth on how and why OSP processes other documents. - Why and when to process modifications, and how to process these in Kuali - The roles and responsibilities of OSP and C&G. - How OSP is connected to the other departments. - Discuss how to maintain your workload on a daily basis (workload tracking sheet).
12:00 – 1:00 PM	**Break**	**Lunch**

NEW STAFF
The First Two Weeks and Future Milestones

Day 9-10

TIME	Activity	Topics
8:45 – 9 AM	Welcome and Overview	Debrief activities from the previous day.
9:00 – 12:00 PM	Other documents/ Roles and Responsibilities	- Go into depth on how and why OSP processes other documents. - Why and when to process modifications, and how to process these in Kuali - The roles and responsibilities of OSP and C&G. - How OSP is connected to the other departments. - Discuss how to maintain your workload on a daily basis (workload tracking sheet).
12:00 – 1:00 PM	**Break**	**Lunch**

NEW STAFF
The First Two Weeks and Future Milestones

Expectations of accomplished Milestones over the next year:

Months 1 -3:

- ☐ Have a basic understanding of OSP bylaws.
- ☐ Basic understanding of general operating procedures like the approval process for proposals and administrative action approval process that occurs during the post award phase.
- ☐ The administrator should be able to able to maintain notes and operate in Microsoft Office Suite, specifically Word and Excel.
- ☐ The administrator should know where information is located on the Google Drive and the OSP website.
- ☐ The administrator is expected to have a basic understanding of proposal budget preparation and the basic parts of a proposal that could be requested during the proposal stage.
- ☐ The administrator should be able to locate general information about the university from the Financial Data Sheet or the website.
- ☐ The administrator should be familiar with the structure of the university in terms of Colleges and departments versus Research Centers.
- ☐ Will be introduced into a work load and working closely with a team leader to accomplish tasks.
- ☐ Introduction to OSP and other university forms and how to complete them.
- ☐ Introduction into contract terms and conditions and becoming familiar with identifying difficult clauses.
- ☐ Ability to find resources given during training or from recent materials to complete the basic information for an array of forms. (i.e. Basic information includes university information found on the financial data sheet, award documents, solicitations, and previously submitted agency forms that are completed annually)

[ ] Employee has satisfactorily met performance expectations for this quarter.

[ ] Employee performance is marginal for this quarter; additional training time is needed. A verbal warning will be issued.

[ ] Employee has failed to meet critical onboarding expectations during this quarter, requiring probationary termination.

Additional Comments:

Administrator Signature:
Date:

Supervisor Signature:
Date:

NEW STAFF
The First Two Weeks and Future Milestones

Months 4-6:

☐   Be able to identify when actions belong to you and your assigned contracts, research centers, or College departments.
☐   Be able to manage your incoming actions and process them within the established three business days.
☐   Administrator should know when to ask for assistance in a timely manner in order to accomplish tasks.
☐   Administrator should be able to use Kuali with minimum errors.
☐   Should be showing that they grasp the concepts that have been discussed thus far in training.
☐   Ability to prepare the correct OSP forms for the action at hand with minimum errors.
☐   Ability to review Terms and Conditions and negotiate troublesome clauses with the agency.
☐   Ability to effectively use resources without being prompted.

[ ] Employee has satisfactorily met performance expectations for this quarter.

[ ] Employee performance is marginal for this quarter; additional training time is needed. A first letter of warning will be issued.

[ ] Employee has failed to meet critical onboarding expectations during this quarter, requiring probationary termination.

Additional Comments:

Administrator Signature:

Date:

Supervisor Signature:

Date:

NEW STAFF
The First Two Weeks and Future Milestones

Months 7-9

- ☐ Ability to apply information in accordance with agency requirements. For example, identifying actions that require prior approval before moving forward.
- ☐ Ability to read, comprehend, understand, and apply a solicitation's guideline for proposal submission with minimum assistance.
- ☐ Ability to review awards and negotiate terms and conditions with minimum assistance.
- ☐ Ability to work with PI's, budget analysts, and other staff to assess questions and give clear responses with minimum assistance.
- ☐ Should be able to discuss with team lead your understanding of a situation and assess what your next steps should be as well as anything you may not know or were unable to find within the terms and conditions or agency submission guidelines and FAQs.

[ ] Employee has satisfactorily met performance expectations for this quarter.

[ ] Employee performance is marginal for this quarter; additional training time is needed. A first letter of warning will be issued.

[ ] Employee has failed to meet performance expectations and has received a previous letter of warning. Employment will be terminated.

Additional Comments:

Administrator Signature:

Date:

Supervisor Signature:

Date:

NEW STAFF
The First Two Weeks and Future Milestones

Months 10-12

- ☐ Ability to assist or cover other administrator's desk with minimum assistance.
- ☐ Ability to independently work on tasks and maintain tracking sheet.
- ☐ Shown the ability to maintain a professional rapport with faculty, research staff, and support staff to accomplish task and manage actions.
- ☐ Ability to identify responsibilities of other UAH offices so that, if needed, a request can be directed to the appropriate point of contact when it's not an OSP function.
- ☐ Ability to independently negotiate Terms and Conditions and work with the Office of Counsel and the Office Technology and Commercialization when needed.
- ☐ Should be able to work comfortably with external agencies and partners to submit proposals, receive awards, maintain information, and answer questions.
- ☐ Be able to handle small projects for OSP as the need arises.

[ ] Employee has satisfactorily met performance expectations for this quarter and has completed the 12-month onboarding program.

[ ] Employee has failed to meet the performance expectations for the 12-month onboarding program and has received a previous letter of warning. Employment will be terminated.

Additional Comments:

Administrator Signature:

Date:

Supervisor Signature:

Date: