Catalyst Quarterly

BY THE SOCIETY OF RESEARCH ADMINISTRATORS INTERNATIONAL

Offering the latest updates, member experiences and achievements, and expert perspectives in research management and administration.

JANUARY 2026

VOLUME 01 | ISSUE 03

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ABOUT SRAI

The Society of Research Administrators International (SRAI) empowers research administrators with professional development, networking, and resources to enhance their expertise and drive impactful research.

This magazine was prepared and designed by SRAI.
Layout and compilation by Saleha Malik, SRAI Communications Manager.

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Catalyst Quarterly

VOLUME 01 | ISSUE 03 | JANUARY 2026

Introduction

The Society of Research Administrators International proudly presents the *Catalyst Quarterly*—a special magazine edition of our newsletter, *Catalyst*. This publication features timely new content alongside standout pieces from the past quarter, offering the latest updates, member experiences and achievements, and expert perspectives in research management and administration.

With each issue, as we aim to uphold SRAI's mission to promote international best practices and support the growth of the research enterprise, the *Catalyst Quarterly* encourages our global community to collaborate, innovate, and continue advancing the quality of the academic and research environment worldwide.

SRAI | SOCIETY OF RESEARCH ADMINISTRATORS INTERNATIONAL

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MANAGING THE MINUTIAE: QUARTERLY HIGHLIGHTS

In research administration, it's all about the attention to detail. From specialized grant proposal timelines and understanding subrecipient relationships to the ever-changing regulations surrounding the use of Generative AI, these articles put it all under a microscope.

In a field that requires constant vigilance, there is no such thing as too much information. Knowledge is power, and research moves with us.

SRAI NEWS & RESOURCES

Editor's Note

Dear Readers,

As we start a new year, I would like to express my gratitude to all the authors, readers and feature editors who help make the *Catalyst* a success. I wish everyone a year filled with collaboration, dedication, and shared achievements.

In this third (ever!) issue of the *Catalyst Quarterly*, we look back on the lessons learned and experiences had during the 2025 SRAI Annual Meeting, which took place last October in San Antonio, Texas, drawing over 1000 attendees from all over the world.

These specially curated pieces range from detailed session breakdowns to lighthearted reflections from the eyes of speakers, attendees, and scholarship recipients.

We are also pleased to share a couple of articles focused on mentoring. Mentorship plays a particularly important role in research administration and compliance, offering benefits such as skill building, confidence building and a support system to the mentees, and leadership opportunities and personal growth to the mentors. We hope that that the articles in this issue will inspire our readers to serve others and the greater research administration & compliance community through increased mentorship. To learn more about mentorship and community involvement opportunities at SRAI, visit srai.org.

Finally, we present to you some highlights from the past quarter, covering the latest in generative AI, subrecipient relationships, the anatomy of a grant, and more.

As always, I invite you, the reader, to share your stories, knowledge and expertise by writing for the *Catalyst.* To learn more on how to submit, flip to page 54. Here's to continued growth for all in the new year!

Farida Lada

Meet the Editorial Team

Farida Lada, PhD, MBA

Editor

Chief Campus Compliance Officer, University of California San Francisco

Farida previously served as Associate University Provost for Research Administration and Compliance at the City University of New York, and was Founding Academic Director of the MS Program in Research Administration and Compliance at the CUNY School of Professional Studies. Prior roles include Director of Research Compliance at Weill Cornell Medical College in Qatar.

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When not working or spending time with friends and family, Aynoka stays busy with home improvement projects, unwinds with yoga, and tries training her cat to jump through hoops.

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Career Growth & Leadership

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Saiqa Anne has extensive experience across the life cycle of awards in Europe and the US, including in research ethics and integrity.

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Feature Editor

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Olumide sources research funding opportunities, reviews research funding applications and obtains internal approvals. He serves as a mentor for SRAI Author Fellowship and Odyssey Programs and is passionate about generating new knowledge in research management.

Community & Member Engagement

Kimberly S. McKoy, Ed.D., CRA

Feature Editor

Associate Director of Contracts and Grants, North Carolina Agricultural and Technical State University

Kimberly has over 23 years of higher education experience. She served on the *Journal of Research Administration* Board since 2015. She is also a Co-Chair for the Sponsors and Agencies Track.

Sheleza Mohamed, MBA, MHA, FACHE, CRA, CFRA, CPRA

Feature Editor

Sheleza is a Federal Grants SME with over 20 years of experience. Sheleza contributes to the field of research administration as a frequent national and international speaker and trainer. She is also an avid volunteer, leader, and writer for SRAI and NCURA.

Grant Development & Strategy

Jose G. Alcaine, PhD

Feature Editor

Director of Research Services and affiliate and adjunct faculty, Virginia Commonwealth University

Jose brings extensive experience in higher education, research administration, and research development and has been a long time member of SRAI, currently serving as SRAI Distinguished Faculty.

Kimberly Read, PhD

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Grant Management & Financial Oversight

Tamara Ginter, CFRA

Feature Editor

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Tamara previously worked for 17 years at the college level at Texas Tech University. In her current role, she oversees all college finances, including post award activities for grants and sponsored projects. She received her CFRA in 2024.

Betty Morgan

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Betty has over 20 years in the life-cycle management of the Research Administration profession. She has worked at UNC CH, Duke, and George Washington Universities.

Operations & Workflow Management

Mark Lucas, CRA

Feature Editor

Chief Administrative Officer, Neurobiology and Computational Medicine, David Geffen School of Medicine at UCLA

With 35 years of experience in research administration, Mark has served on the SRAI Catalyst Committee for the past five years. He is President Elect for the SRAI Western Section and also serves as SRAI Distinguished Faculty.

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Anita manages institutional programs, leading strategic planning and program development, researcher development, grant facilitation, and internal awards administration. Also an SRAI Future of the Field honoree, she is passionate about the progressive growth of the institutional research profile.

Regulatory & Compliance Oversight

Rani Muthukrishnan, PhD

Feature Editor

Director of Research Compliance at Texas A&M University–San Antonio

In her role, Rani manages IACUC, IBC, IRB, export controls, research security, RCR, research integrity and more. She holds doctoral degrees in both Education and Ecology, and has been published in SRAI's *Journal of Research Administration* and *Catalyst.* She enjoys writing about best practices, challenges, and trends in the field.

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Feature Editor

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In her role, Anita oversees NIH documents and regulatory activities. She holds a B.S. in Graphic Design from Farmingdale State College, SUNY, and a M.S. from Bridgeport University. Passionate about fostering community engagement, she regularly offers guidance to colleagues and aspiring professionals.

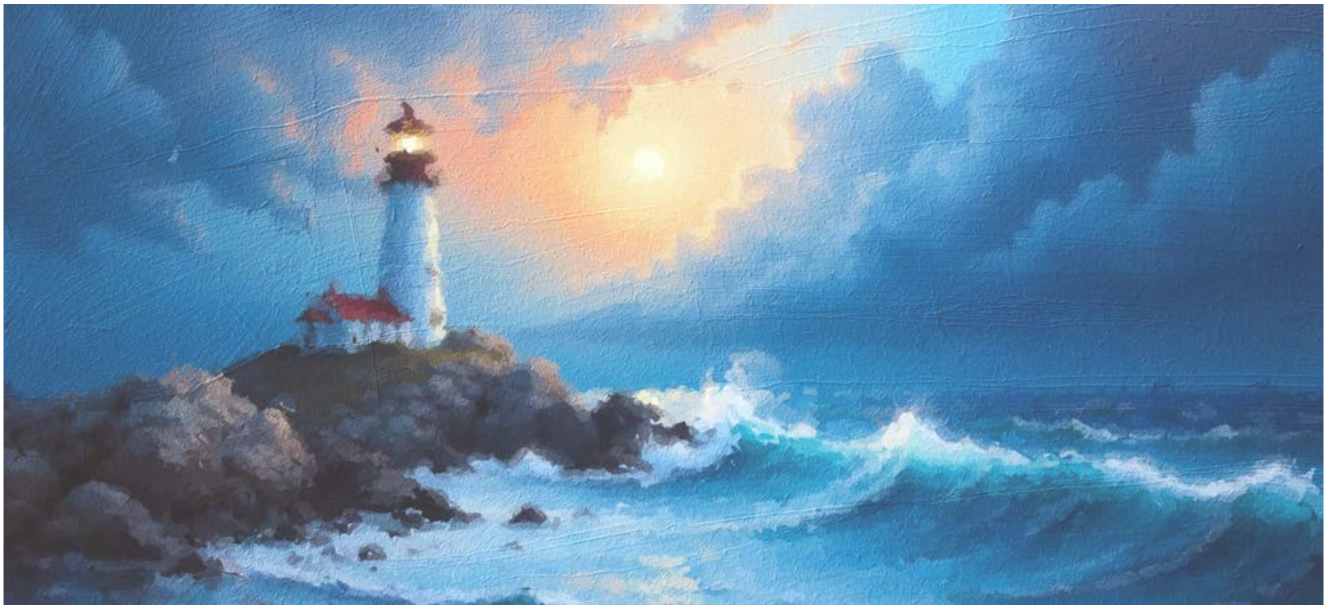
CONFERENCE EXPERIENCE

A Lighthouse in the Storm: Reflections from an SRAI Annual Meeting Scholarship Recipient

By Laura Sheehan

Amid an unprecedented year of funding uncertainty and professional strain, the SRAI Annual Meeting Scholarship made it possible for one research administrator to reconnect, recharge, and contribute meaningfully to the field.

Each year, attending the SRAI Annual Meeting is one of the highlights of my job. Learning new things, meeting new colleagues and catching up with old ones, diving deep into complex issues regarding research funding, hearing firsthand about what is—and is not—working in research administration across the country and around the world, sharing my knowledge with my peers: the Annual Meeting represents the only three days each year where I can set aside my day-to-day work responsibilities (and family responsibilities, too) and focus solely on the craft of my career. I have been extremely fortunate that my employer has supported my attendance at the Annual Meeting for the last five years, and I was greatly looking forward to the 2025 meeting in San Antonio.



So, when I learned that it was extremely unlikely my university would be able to fund my attendance due to the uncertain federal funding climate and resulting travel restrictions, my spirits sank. I already had two concurrent sessions accepted for presentation and was halfway through finalizing my slide decks. I had made my hotel reservation, and my husband had already shifted his schedule to ensure my daughter's childcare needs would be met in my absence.

With the federal funding landscape rapidly shifting-grant terminations and suspensions coming from all angles, policy announcements rolled out only to be deemed unlawful the next day—2025 had already been a tempest. It was the most challenging year I've faced in my 25-plus years in the industry. The thought of missing the Annual Meeting felt like watching a lighthouse fade just as the storm intensified.

My husband and I reviewed our finances. Could we pay for the meeting out of pocket? The answer was no—not unless we received at least some financial assistance.

That's when I remembered SRAI's Annual Meeting Scholarship.

If I were selected, we just might be able to make it work. I applied and was so incredibly grateful when I learned that I had been chosen.

The scholarship was not only a tremendous financial relief; it felt like a validation of the hard work I had been doing to keep my research unit afloat as wave after wave battered our industry. It was comforting to know that, during this storm, SRAI saw value in my contributions and extended a lifeline to bring me safely ashore.

I was humbled by this investment in my professional growth and energized by the opportunity to continue contributing meaningfully to SRAI's mission.

And the Annual Meeting did not disappoint.

I attended several sessions and engaged in many conversations about the current research funding landscape and administrative challenges we are facing. I learned how colleagues across institutions are navigating similar challenges, from adapting to evolving federal guidelines to supporting anxious faculty members. It was cathartic to know I wasn't alone and reassuring to learn how others are weathering the storm. Sessions addressing NIH

funding and the proposed FAIR Model for facilities and administrative rates proved particularly invaluable. Gaining a deeper understanding of the new F&A structure and its potential institutional impact equipped me with concrete information to share with leadership and faculty. Rather than simply reacting to headlines, I now have a framework for strategic planning and can help my institution prepare for multiple scenarios.

I also attended several sessions on artificial intelligence applications and was especially excited to learn about advancements in using AI to identify funding opportunities—an area well-suited for this technology, yet one in which it has historically underperformed.

Presenting two concurrent sessions felt like the beginning of returning the investment SRAI made in me. “Beyond the Resume: A Strategic Approach to Hiring Research Administrators” addressed one of our field's most pressing needs: building teams equipped to handle today's complexities. “The Launch Pad: A Research Administrator's Guide to Propelling New Investigators to Proposal Success” explored how we can strengthen our role as mentors to early-career researchers. These sessions were not just presentations; they became conversations enriched by colleagues who shared their own insights and challenges.

As the meeting drew to a close, I felt more committed than ever to giving back to the organization that has given me so much. I look forward to continuing my involvement through speaking opportunities, sharing lessons learned with the community, serving as an instructor for SRAI Intensive Training Programs, and contributing to SRAI’s e-newsletter, the *Catalyst.*

I left San Antonio refreshed—both mentally and emotionally. I returned with renewed purpose, expanded knowledge, and a stronger professional network. In the midst of the storm, I now feel better equipped: with a clearer map, a larger crew, and a compass pointing firmly in the right direction.

To SRAI and the scholarship committee: thank you for investing in not only my professional development, but in the future of research administration itself—and for serving as a lighthouse during an especially turbulent year.

AUTHORED BY:

Laura Sheehan
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2025 SRAI Annual Meeting Scholarship Recipient
& 2025 SRAI Annual Meeting Session Speaker

SRAI

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Dr. Anna Quider
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SRAI Society of Research Administrators International

SESSION HIGHLIGHT

Strategies and Best Practices for Effectively Managing Up in Research Administration

By Cecilia Canadas

In the fast-paced environment of research administration, we are expected to be experts with a broad knowledge base across many areas. An often-overlooked soft skill for success in the field is managing up: building and maintaining a positive, productive relationship with your manager. This content was first presented at SRAI's Annual Meeting in San Antonio.

In research administration, we frequently juggle competing deadlines, clarify expectations, and liaise with both internal and external stakeholders. One soft skill that is often overlooked but highly impactful is managing up – the art of building and managing a constructive relationship with your manager. When done effectively, managing up enhances the work environment, increases job satisfaction, and creates opportunities for professional growth. It is cultivating a partnership that benefits you, your manager, your team, and your organization.

Key Principles for Successfully Managing Up

> Adapting doesn't mean losing authenticity—it means finding a compatible rhythm. At its core, managing up is about understanding, communication, and flexibility.

Successfully managing up centers on effective communication with your manager. Strive to be clear, concise, and organized in all interactions. Anticipate your manager's questions and needs, and approach situations with honesty while focusing on solutions. It is also important to adapt to your team's unique style and preferences while consistently showing respect for their time. Document conversations and decisions and provide brief recaps to maintain transparency. Building trust comes from being reliable and consistent in your actions and follow-through. Managing up is a partnership, not manipulation or flattery. It involves cultivating a relationship grounded in clarity, respect, and mutual understanding. In the complex world of research administration, these principles can be a powerful tool for professional success.

Below, we will examine two typical workplace scenarios and strategies for managing them effectively.

Scenario #1:

Working with a Micromanaging Manager

You notice that your manager frequently requests updates, insists on check-ins that could be handled by email, and seems overly tense about deadlines. While this can be frustrating, it often stems from a desire for accountability and reassurance. The key is to proactively provide structure and build trust gradually through consistency and reliability.

Strategies:

1. Be proactive: Don't wait for updates to be requested, Establish a regular reporting system, such as a shared project tracker or a weekly summary email. This helps your manager feel informed and reduces their need to micromanage.
2. Clarify expectations: Ask what information your manager finds most helpful. For example: "I want to make sure I'm providing sufficient updates. Would you prefer quick check-ins or a detailed weekly summary?"
3. Demonstrate reliability: Meet deadlines consistently and deliver quality work. This builds trust and reassures your manager that oversight is not needed.
4. Empathize and communicate calmly: Recognize that micromanagement may stem from their own pressures. By remaining professional, patient, and proactive, you foster trust and gradually create a more relaxed dynamic.

Scenario #2:

Managing Different Workstyles and Conflict Resolution

Your long-time manager has retired, and your new manager, hired externally, brings a more aggressive management style. Sweeping changes have caused unease within the team, and you feel discouraged.

Strategies:

Schedule a one-on-one meeting: Discussion work preferences, goals and priorities to align expectations.

Communicate professionally: Address issues respectfully. For example: "I have noticed some team members are struggling to adjust to the new process. Would you like me to help gather feedback or suggest ways to ease the transition?"

Adapt to their style thoughtfully: If your manager prefers quick decisions or direct communication, mirror their style while maintaining your professionalism. Adapting doesn't mean losing authenticity- it means finding a compatible rhythm.

At its core, managing up is about understanding, communication, and flexibility. Every manager has unique motivations, fears, and styles. By recognizing these dynamics and approaching them strategically, you can transform potential friction into professional growth. Effectively managing up not only eases your manager's job but also enhance your career development, workplace harmony, and overall success.

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SESSION HIGHLIGHT

When the Ball Drops: Effective Communication Between RA & PI

By Tamara Ginter, MBA, CFRA,
Debora S Hoelscher, CRA (inactive), & Linda Dement

Effective communication between Research Administrators (RAs) and Principal Investigators (PIs) is fundamental to successful grant management. Here are the key insights from "When the Ball Drops: Effective Communication Between RA & PI," a 2025 Annual Meeting Session which explored strategies to prevent miscommunication, foster trust, and anticipate needs across the research lifecycle.

This annual meeting session examined the critical role of communication in successful grant management through a series of discussion scenarios. Effective communication is not simply about exchanging information, but about fostering trust, clarifying responsibilities, strategies to prevent miscommunication, and anticipate needs across the research lifecycle.

Grants are complex. They involve compliance requirements, financial oversight, and coordination across multiple units. Miscommunication in this environment can lead to missed deadlines, budget errors, PI dissatisfaction, or compliance delays. Unclear expectations or delayed communication can result in significant issues, such as missing salary appointments or last-minute equipment purchases, highlighting the importance of proactive planning and shared accountability between RAs and PIs.

During the session, attendees shared examples of similar scenarios that occurred at their institutions, including what did or didn't work. These audience examples led to more dialogue on the value of conversations throughout a process, rather than at an endpoint. One example that was provided was failure to discuss and fully engage everyone involved in the purchasing and installation of equipment at a university. Due to the location, age of the building and pipes, and the overall size of the equipment, the facility couldn't support the purchase and install equipment that was budgeted. This highlighted the need for the PI to communicate effectively at their institute with purchasing, facilities, and not just the research administrators who supported them. It was clear to see that communication was where that "ball was dropped."

Strategies for effective communication should be a central focus, and its important approach conversations constructively, "finding a way to say yes" rather than leading with "no." Establishing mutual respect and choosing the right communication format—whether email, phone, or in-person—is key to building trust. What should mutual respect and communication look like, how to strive for that, and how to set that "tone" when addressing investigators. Real life experiences shared in the session included bias due to knowledge or education level (degrees) or gender and prior experience with another research administrator led to difficulties in building mutual trust and respect. It's important to ask clarifying questions, tailoring responses to the PI's context, and avoid jargon or overly complex language. Clear, concise, and intentional communication is essential to maintaining credibility and efficiency.

It's also important to have recovery strategies for communication breakdowns. When tensions arise, RAs can pause before responding, seek second opinions, or shift communication formats to reset the tone. Empathy and transparency were emphasized as tools to rebuild trust, especially in situations where historical relationships between PIs and RAs may have been strained. An example shared was that an RA faced accusations of

mismanaging grant funds. Guidance provided included focusing on investigation, accountability, and relationship-building to restore confidence. This can help when approaching the discussion of finances with an investigator so they can review the costs and ensure they are correct. How often should you be meeting with your PIs? Responses from the session varied, from monthly, to quarterly, to not much at all. One attendee's office was in the heart of the research center, so investigators could reach out as needed, but still there was difficulty in communicating and access. The consensus was that it was determined often by institutional requirements and investigator preferences, leading often to delayed communication, strained relationships, or errors that highlighted someone had dropped the ball.

Broader strategies for success include defining roles and responsibilities, creating matrices to clarify tasks, scheduling regular check-ins, and respecting PI time. RAs should act as translators for faculty, providing context and solutions rather than simply relaying information. Training for new PIs and ongoing education for experienced ones are recommended to strengthen institutional communication practices.

Effective communication can be "anything that works." A way to do this is practicing adaptive communication—tailoring their natural communication style to the needs of their audience. While no single approach fits every institution, intentionality, adaptability, and relationship-building are universal principles that help ensure smooth collaboration and successful grant outcomes and can prevent dropped balls.

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CONFERENCE EXPERIENCE

Research Administration in LMICs Institutions: Strengthening Compliance and Capacity-Building

By Adnan Altaf & Melaine D'Cruze

At the 2025 SRAI Annual Meeting, I presented AKU's initiatives to strengthen research administration in low- and middle-income countries (LMICs) through structured training for administrators and faculty, as well as an integrated compliance framework. These efforts aim to build institutional capacity and support complex grant portfolios across multiple campuses.

At the 2025 Society of Research Administrators International (SRAI) Annual Meeting in San Antonio, I had the opportunity to present two sessions: focused on strengthening institutional capacity for research administration in low- and middle-income countries (LMICs) settings, and the other on fostering well-governed research environments capable of supporting growing and complex grant portfolios. The content and resources for these sessions were developed collaboratively by me and co-author Melaine D'Cruze, Director Research Office, whose contributions in conceptualizing and preparing these sessions were instrumental.

The first session, *Bridging Skill Gaps in Grant Management: A Capacity-Building Initiative for University Administrators*, focused on the human capital contribution for research administration. As research funding grows across LMICs universities, the demand for well-trained administrators has significantly increased. I presented Aga Khan University (AKU)'s structured and institution-wide training program, offered over 2024 and 2025, designed to equip research administrators, faculty, and operational staff with essential skills in grants management, soft skills, effective tools for project management, ethics in research, basics and mastering of research administration, and broader research administration competencies. The sessions were delivered by internal and external experts from around the world.

The initiative includes a comprehensive training calendar, communities of practice (COPs), evaluation, certification, and one-on-one consultation sessions. All the material and resources, including video recordings, are posted on AKU's virtual learning platform, "Skills and Training for Research Innovation, Development, and Excellence" (STRIDE). The program supports faculty and staff in Pakistan as well as colleagues in East Africa and the United Kingdom, promoting standardized practices across campuses. A Training Needs Analysis (TNA) survey conducted at the end of 2024, informed the training calendar, resulting in improved sessions emphasizing compliance awareness, basic-to-advanced research administration skills, and stronger collaboration between central offices and departments. The session highlighted that effective capacity-building must be ongoing, accessible, and tailored to institutional requirements.

The second session, *Establishing a Research Compliance Framework in a Research-Led University of LMICs*, demonstrated how AKU developed and implemented a structured research compliance framework. It illustrated how three core tiers of compliance—Ethics and Integrity, Extramural Requirements, and Biosafety—are integrated and

operationalized within a cohesive framework. The session showcased core components, governance structures, and tools (like the Compliance Matrix) that ensure adherence to agency requirements, mitigate risk, and support due diligence across the research grant lifecycle. The session's goal was to emphasize the importance and feasibility of building robust institutional compliance systems in LMICs through strategic planning, institutional commitment, and capacity-building.

The framework categories are visualized on page 21 for ease of understanding.

I was honored to receive the 2025 John Robinson Travel Scholarship and the Future of the Field award, which enabled me to attend the Annual Meeting and present AKU's institutional advancement in both research administration and compliance. The meeting also provides invaluable networking and collaboration opportunities with peers from around the world.

AUTHORED BY:

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& 2025 SRAI Annual Meeting Session Speaker

Melaine D'Cruze
Director, Research Office
Aga Khan University

SESSION HIGHLIGHT

Feel the Need, The Need for Speed Networking

By Jose G. Alcaine, PhD, MBA, CRA

Talk fast and make friends. Speed Networking, an event involving timed conversations between attendees, is a common practice used to build community and help advance relationships within a profession or organizations. A successful Speed Networking session was held on October 20, 2025, at the SRAI Annual Meeting in San Antonio, Texas.

The energy was palpable at the Speed Networking Session held at the 2025 SRAI Annual Meeting in San Antonio. Scheduled at the end of the day, and starting at 5:30pm, one would expect tired conference goers, low energy, and scant attendance at this session. And yet, those expectations couldn't have been further from reality! High energy, animated discussion, and genuine engagement defined the session. Organized with the help of SRAI headquarters staff, and led by Ambassador Co-Chairs, Justin Hall (Geisinger Health System) and Heather Wainwright (University of South Alabama), and yours truly, Jose Alcaine (Virginia Commonwealth University), the Speed Networking session touted over fifty attendees and provided a unique opportunity for networking and discussion with peers and professional colleagues. That so many people attended this optional event was a great affirmation for in-person engagement.

Networking in Action

Speed Networking involves pairs of colleagues speaking with each other for three to five minutes. At the end of the pre-determined time limit, speakers switch to talk with the next participant. Prompt questions or conversation themes can be provided to initiate the discussion. The time-limited conversations continue for as long as time allows or all participants have engaged with each other. This practice is commonly used in research development efforts and also in situations where introductions, engagement, and relationship building is the goal.

At the San Antonio meeting, table rounds were set up, each with chairs for two discussion pairs per table (so about four people per table). At the end of three minutes, one person from each pair would move or rotate to the next table. In the period of forty to forty-five minutes, participants had ample chances to meet new colleagues and make new connections. The hope is that once participants introduced themselves each other, conversations and new friendships would continue through the conference and beyond. Judging by the discussion and high level of noise, the session provided a welcome opportunity for community-building in San Antonio.

Speed Networking at SRAI Annual Meetings

The Speed Networking session at the San Antonio Annual Meeting was the fourth iteration of this fun practice. My colleague Courtney Hunt (Houston Methodist Research Institute) and I first held a Speed Networking concurrent session in 2022 at the Las Vegas Annual Meeting. Small in size but fun

and engaging nonetheless, the concurrent session was well-received and provided a good trial run for open and expanded sessions at both the Seattle and Chicago Annual Meetings in 2023 and 2024, respectively. Each iteration of the Speed Networking session has provided a welcoming space for fostering new connections in the field.

I encourage all to start this practice at your own institutions—whether as part of new faculty orientation, staff meetings and engagement, grant development, or just as part of your community building efforts. Godspeed in your Speed Networking and I hope to see you at the next one!

AUTHORED BY:

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SRAI Distinguished Faculty & SRAI Catalyst Feature Editor

SAVE THE DATE

OCTOBER 10-14

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E HO'OMAU: RIDING THE TIDES OF OPPORTUNITY

E Ho'omau in Hawaiian is to persevere, to continue, and to move forward with resilience and purpose. While the tides around us are ever-changing, our profession endures by adapting, learning, and leading together. Join us this October in a setting that embodies both renewal and continuity — and let's move forward into the future of research administration.

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THE ROLE OF MENTORSHIP IN RESEARCH ADMINISTRATION

A Two-Way Street: How Mentorship Builds Character & Nurtures Professional Growth in Research Administration

By Floris van der Leest

Mentorship in research administration is a two-way journey of growth, resilience, and connection. From Homer's Odyssey to modern programs, career and psychosocial support across generations can boost confidence, reduce burnout, and strengthen our professional community—one conversation at a time.

Mentorship has been a cornerstone of my own professional journey, and I've seen how its full potential is often underappreciated in modern research administration. At its heart, mentorship is a dynamic, two-way process that fosters growth, resilience, and adaptability for both mentor and mentee. The term "mentor" originates from Homer's Odyssey, where Odysseus entrusts his son Telemachus to a trusted old friend named Mentor. Ironically, the most transformative guidance came not from Mentor himself, but from Athena, goddess of wisdom, who assumed his form to guide Telemachus on his own life-changing journey. This story reminds us that effective mentorship often transcends formal roles and requires adaptability to the needs of the mentee.

Mentoring behaviours typically fall into two broad categories: career mentoring and psychosocial mentoring (Kram, 1988). Career mentoring supports professional growth, helping mentees learn the ropes, gain recognition, and advance through sponsorship, exposure, coaching, protection, and challenging assignments.

Psychosocial mentoring nurtures personal development, fostering confidence, resilience, and a sense of belonging through encouragement, role modelling, active listening, and guidance through challenges. Both dimensions are essential, and in my experience, the most effective mentoring relationships either integrate elements of each or involve different mentors for each aspect.

Research demonstrates the tangible benefits of mentoring. Early-career academics with multiple mentors report higher job satisfaction, stronger career progression, and lower feelings of isolation. Mentors themselves also benefit, experiencing enhanced job satisfaction and organizational commitment, particularly among female academics with leadership aspirations (Thomas, 2015). These findings resonate strongly with me, as I've observed first-hand how timely guidance can transform confidence and career outcomes. Mentoring is not just advice; it's a catalyst for professional growth and fulfilment.

Crucially, mentoring also buffers the effects of difficult working conditions. In environments where workloads are heavy, recognition limited, or resources stretched, mentorship can boost intrinsic and career satisfaction, enhance job performance, and reduce burnout (Van Emmerik, 2004). Mentored individuals report lower emotional exhaustion and stronger feelings of personal accomplishment. In today's world of research management, where professionals often juggle competing priorities under tight deadlines, this protective role of mentorship cannot be overstated.

Traditional mentorship often arises from shared interests or professional experiences. While this can be effective, the most impactful mentoring occurs when mentors actively focus on the mentee's needs, providing guidance, encouragement, and perspective. Successful mentorship balances familiarity with purposeful support, fostering growth for the mentee while also offering meaningful development for the mentor.

Mentorship can be structured or organic. Formal programs provide frameworks through criteria-based matching, clear goals, and timelines, while informal relationships develop naturally through mutual respect and shared interests. Combining both - formal for clarity, informal for depth - yields the richest experiences. A contemporary example is the SRAI Odyssey Mentoring Program, a 12-month, one-on-one international initiative. Mentees identify areas for development, mentors specify their expertise, and together they co-create learning goals. Much like Telemachus's journey under Athena's discreet guidance, participants navigate their professional "odyssey" with a supportive partner, cultivating skills, confidence, and often cross-cultural insight.

Practical guidance for mentors can be distilled into nine core principles: be insightful, intentional, objective, transparent, facilitative, empathetic, attentive, confidence-inspiring, and culturally aware. These behaviours help mentors guide mentees toward achieving their goals while modelling professional and interpersonal excellence.

Finally, mentorship is best approached actively. I encourage you to take on the 7-Day Challenge: ask someone to be your mentor, offer mentorship to someone else, or ideally, do both in the coming week. By translating these ideas into immediate action, you'll experience the benefits of mentorship first-hand while contributing to the growth and resilience of your colleagues and our profession.

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AI Usage Disclaimer

I have used the free version of ChatGPT to help transform a slide deck, originally presented at this year's edition of the annual conference of a sister organization (ARMS), into a roughly 600-word manuscript. The AI-generated draft was subsequently reviewed, refined, and edited extensively by me to ensure accuracy, clarity, and alignment with the intended narrative.

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Bridging Distance and Difference: Building Authentic Connection Through the SRAI Odyssey Mentoring Program

By Heidi L. Bradley, MS, CRA, & Lucy Upah, MPA

Mentoring is essential for the future of research administration, and technology can transform mentoring relationships to reach beyond physical distance and differences. This article highlights the power technology has for building connections, authentic friendship and professional knowledge for Heidi and Lucy, an SRAI Odyssey Program mentoring dyad.

Research administration is a field that many do not prepare for or seek education for specifically, but rather find themselves in. To get acclimated to the field, there must be someone to learn from. Mentoring in research administration is pivotal, as this field interfaces with a multitude of different elements, connects directly to funding agencies, and requires steadfast compliance to continue the work being done by researchers around the globe.

> Institutions and programs should be encouraged to support accessible and supportive mentorship, especially in research administration where the future of research and science sits, in part, on our shoulders.

The research and discoveries of tomorrow rely on the research administrators of today. SRAI's Odyssey Mentoring Program serves a key role in securing the future of the field by creating relationships for learning, growth, innovation, engagement, and compliance.

The Mentoring Dyad

In 2023, SRAI matched Heidi Bradley and Lucy Upah through the Odyssey program. Heidi Bradley is a Program Director at The University of Texas MD Anderson Cancer Center with over 5 years of experience in research administration. Her role brings together research administration, human resources, research, and strategic programs to enhance the culture of her institution. Lucy Upah is Gallaudet University's post-award grant administrator of over 2+ years. In her role, Lucy partners with faculty, principal investigators, and staff to ensure proper stewardship and compliance of awarded grants, so that principal investigators maximize the impact of their sponsored funding.

Before our initial virtual meeting, Lucy reached out to Heidi to share that she is deaf and would be using assistive technology to support real-time communication. We acknowledge that individuals with disabilities have their own unique needs. No one-size-fits-all solution exists, and what worked for us may not work for others.

Technology as the Bridge

For us, the use of technology eliminated any communication barrier and allowed for seamless communication. Lucy created a shared online document in which she would post questions or items she needed support with before our meetings. Heidi would review the document, provide a text response and, during our bi-weekly meetings, we would talk through it leveraging captions and Zoom's chat feature. What started as a catalyst for conversation during our meetings transformed into being a vital resource for Lucy to get support when she needed it between meetings, and eventually, she even shared the document with others in her institution so they could benefit and learn as well.

Authentic Friendship

We both entered this relationship with intentions to build trust and rapport to grow in our careers. Our mentoring connection blossomed from being about research administration in entirety to truly becoming a friendship. Lucy was one of Heidi's biggest supporters when Heidi earned her Certified Research Administrator (CRA) certification in 2024 and Heidi has been there for Lucy as her institution has undergone tremendous change. We have been locked in, side-by-side through good times, through the challenges our currently facing profession and through personal hardship. Despite our distance and the differences in our job scopes, institutions and abilities, technology coupled with flexibility and openness created a perfect environment to build connection. With empathy, active listening, and shared experiences, we created a bond of lifelong friendship.

Championing Mentorship for a Resilient Future

Research administration is a remarkably complex field and only growing in complexity. Mentorship and connection are powerful tools to not only build bonds, but also to ensure compliance and for succession planning. Institutions and programs should be encouraged to support accessible and supportive mentorship, especially in research administration where the future of research and science sits, in part, on our shoulders. The community should continue to share best practices, like we do here, that improve the quality of relationships for all research administrators, including those with differing needs. As a community, we must come together more than ever through times of change to build bridges of support and create meaningful professional relationships.

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GRANT DEVELOPMENT & STRATEGY

Grant Anatomy: A Crash Course in Proposal Timelines

By Kimberly Pratt, MA CRA, & James Taylor

Do your faculty scramble to meet a grant deadline like Meredith Grey? Kimberly Pratt and James Taylor share how proposal timelines can transform chaos into clarity. Learn practical strategies to streamline submissions, avoid last-minute drama, and support your research team without the tears.

We — Kimberly and James — first met through SRAI's Odyssey mentoring program, and we quickly found out we're both fans of Grey's Anatomy. That shared interest helped build a connection, making our mentoring relationship feel more like a partnership.

And while the show isn't exactly known for medical accuracy, as pre-award administrators, we were astonished during Season 10, Episode 6, "Map of You", when Dr. Meredith Grey scrambles to write a grant at the last minute. "Tonight is the deadline to submit for the NIH research grant I want, and I'm having trouble deciding [on a research topic]," she reveals to Dr. Bailey. Miraculously, her grant was funded, but most of us would agree that proposals tend to fare better in review when they're not fueled solely by drama, adrenaline, and caffeine.

In the real world of research administration, proposal timelines are essential tools for organizing the submission process and avoiding last-minute scrambles like the one Mer experienced. A well-constructed timeline details the key tasks and milestones that must be completed before submission, identifies the team members responsible for each task, and clarifies the resources needed. It also maps the interdependence between tasks, helping surface potential conflicts or bottlenecks early. Most importantly, timelines communicate expectations — who is doing what and by when — to ensure a smooth, successful submission.

For example, imagine you're supporting a multi-institutional NIH center grant submission. By creating a detailed timeline six or more months in advance, you can map out internal deadlines for budget drafts, biosketch collection, subaward documentation, and scientific review. If one of your collaborators experiences a delay — say, a lab hits a snag in data collection — you'll be able to adjust your internal review schedule without putting the entire submission at risk. Without a clear timeline, though, you might find yourself in a situation like Meredith's: scrambling to finalize documents, likely dealing with errors, and narrowly avoiding a missed submission.

To create a proposal timeline, consider these key questions:

- **Who is on the proposal team, and what are their roles?** What other commitments might affect their availability?
- **Who else needs to know about the proposal, and by when?** Does your organization require an intent-to-submit form or enforce a deadline?
- **What are the guidelines in the notice of funding opportunity?** What components are needed, and in what order should tasks be completed? For instance, personnel and other ancillary documents can often be requested early, but subrecipient documents and approvals may take longer to receive and often require follow-up.
- **What information do you need from others, and how long will it take to receive it?** Consider potentially competing deadlines, proposal volume, and external events and commitments that might impact their timeliness.

- **What internal approvals are required, and who coordinates them?** How long do they take, and what triggers the process? If cost-sharing or space is involved, how far in advance must those be approved?

- **What submission system is being used, and who manages data entry and uploads?** If one person handles everything, be mindful of their workload and potential bottlenecks during busy submission times.

- **What does submission timing look like at your institution?** Are there internal deadlines? Is the submission order based on receipt or the sponsor deadline? Are there priority rules that govern submissions?

Building a timeline can be challenging in the beginning. You'll need to estimate task durations, understand institutional processes, and account for competing priorities across teams. Internal deadlines, approval workflows, and sponsor requirements all shape the timeline's structure. With experience, a research administrator can learn to anticipate potential challenges.

These three different types of timelines are most-commonly used to support planning:

- A **chronological or sequential timeline** shows tasks in order.

- A **Gantt chart** maps overlapping activities and durations graphically.

- A **work breakdown structure (WBS)** organizes deliverables or phases by milestone and responsibility.

No matter which tool you use, the most important function of a timeline is to communicate what needs to be done, by whom, and by when. But it's also essential to recognize that life and unexpected delays happen. A well-developed timeline builds in flexibility and grace for investigators and research administrators alike Because, let's be honest: as much as we enjoy the show in our free time, we'd all prefer fewer "Meredith moments" in our day-to-day work.

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GRANT MANAGEMENT & FINANCIAL OVERSIGHT

Subrecipient Monitoring: Keys to Successful Subrecipient Relationships

By Carly Pigg, CRA, CPRA, CFRA, & Betty Morgan, CRA, AOR

Navigating the complex dynamics of a subrecipient collaboration between institutions can be a daunting task. From initial proposal to closeout, effective oversight of internal controls, good time management, and clear communication all help lead to successful outcomes.

A subrecipient is a legal entity that receives a subaward in which your organization serves as the prime recipient (pass through entity) of a grant. The subrecipient is responsible for carrying out a portion of the programmatic effort of the proposed project.

In the proposal phase, it's imperative to determine if the entity is a subcontractor (subaward, subrecipient) or is this a contractor. This will determine how the proposal, and subsequent award, is monitored and managed.

Let's define the criteria for a subrecipient:

- Determines who is eligible to receive federal assistance
- Has its performance measured in relation to whether objectives of a federal program have been met
- Responsibility for programmatic decision making
- Responsible for adherence to applicable federal program requirements specified in the federal award
- In accordance with its agreement, uses the federal funds to carry out a program for a public purpose specified in authorizing statute

> "It is vital that internal controls for subrecipient monitoring be established and maintained during the life of the award and collaboration."

Now, let's look at the criteria for a contractor:

- Provides goods and services within normal business operations
- Provides similar goods or services to many different purchasers
- Normally operates in a competitive environment
- Provides goods or services that are ancillary to the operation of the Federal program
- Is not subject to compliance requirements of the Federal program because of the agreement, though similar requirements may apply for other reasons

Many organizations use checklists that pre-award specialists complete to help determine whether an external entity should be classified as a subrecipient or contractor. These checklists are often included as part of the subaward documentation within the proposal package.

Once we've confirmed that the entity is a subrecipient, let's focus on next steps in establishing the consortium. The collaborating institution will need to provide a subaward proposal package to the lead institution during proposal development and submission. The following documents are typically required:

Scope of Work: This is supplied so that your PI can confirm the subaward will meet the goals and objectives of the overall project, and for the sponsor to be aware of the subaward's contributions to science.

Budget: Unless there is a cap from the sponsor, the subrecipient institution should use their federally negotiated rate or the de minimis rate (15%) if they do not have a negotiated rate.

Their allowable expenses fall in line with any other federal project: Personnel, Supplies, Travel, Other Expenses, etc.

Once the proposal is awarded, it is time to execute an agreement with the subrecipient. You will want to touch base with your counterpart at the cooperating institution again for updated contact information.

Review awarded budget with your PI to determine if any adjustments have been made to the overall budget. Do you need to request an updated budget from the subrecipient?

Ensure with your PI that the scope of work remains the same (especially if the budget has been adjusted). Substantial changes to the aims will require sponsor approval.

Another area to review is risk assessment of the subrecipient. This is typically done by a centralized sponsored research office. An institutional form may be sent with the subaward package, listing a set of questions concerning previous audits, etc., and may also require a copy of their most recent single audit. This copy can also be obtained from the FDP Clearinghouse.

It is vital that internal controls for subrecipient monitoring be established and maintained during the life of the award and collaboration. The passthrough entity (PTE) is responsible for monitoring the programmatic and financial activities of its subrecipients to ensure proper stewardship of sponsor funds.

The purpose of subrecipient monitoring is to confirm that your subrecipient is complying with all laws, regulations, and provisions of grant agreements, and that performance goals are obtained. The subrecipient is accountable to the PTE for the use of the federal funds provided pursuant to this subaward. In order to comply with OMB Uniform Guidance to ensure accountability for the use of federal funds, PTE reserves the right to request full documentation for all invoices. Full expense documentation includes, but is not limited to, general ledger(s), receipts, vendor invoices, prior approval documentation, time & effort reporting certifications, time sheets, travel documentation, equipment bids, etc. Recent changes have occurred with the issuance of federal funded subawards to foreign entities. Be sure to review all relevant federal guidance, terms, and conditions.

The department/PI is usually responsible for the following:

- Obtaining prior approvals for any re-budgeting required.
- Confirming subrecipient is submitting invoices on time.
- Ensuring invoices are submitted in accordance with subaward requirements
- Ensuring that duplicate costs or invoices have not been submitted. Revised invoices can be submitted if any of these have been found.
- Ensuring invoices only contain expenses that are allowable, allocable, and reasonable.
- Verifying that costs are incurred within the period of performance.
- If applicable, verifying cost sharing is appropriately reflected and documented.
- Collecting technical progress reports.
- Maintaining regular contact with the subrecipient and checking in regularly with the PI that this is being done.

The department (PI, grants manager, business manager) should review and approve invoices. Remember, the PI is reviewing from the scientific standpoint. The grants manager and/or business manager is reviewing from the budget perspective. The invoice, once approved, is forwarded to the sponsored projects office for final approval. The sponsored projects office usually forwards to accounts receivable to be paid.

The central office is usually responsible for the following:

- Account setup
- Federal Funding Accountability & Transparency Act (FFATA) Reporting: How the government reviews for waste, fraud, and abuse (https://sam.gov/fsrs).

There are a few potential issues to safeguard against. If there will be a change in PI at the subaward institution, it must be provided in writing to the institution, and an amendment to the subaward will need to be made. This also usually requires a prior approval from the sponsor as the PI at the subaward institution is usually senior/key personnel.

As typically stated in the agreement, either party has the right to terminate, in whole or in part. The institution agrees to compensate the subrecipient for any work completed prior to the termination.

For-profit foreign entities are accountable to the PTE for use of the federal funds. These entities are not required to submit audits under Uniform Guidance, but the institution requires the right to request backup documentation for any invoice (Subpart F-Audit Requirements).

Any of these issues could be subject to an internal audit of the subaward. Per the agreement, the institutional auditors, or those designated by the institution, shall have the option of auditing all accounts pertaining to the agreement. If this occurs, the subrecipient must make these records available for audit during normal business hours.

These items will be included:

- Ensure that subrecipients expending $1,000,000 or more in federal awards during the subrecipient's fiscal year have met the audit requirements.
- Issue a management decision on audit findings within six months after the receipt of the subrecipient's audit report.
- Ensure that the subrecipients take timely and appropriate corrective action on all audit findings.
- If a subrecipient is not willing or is unable to have the required audits, then the institution will take appropriate actions using sanctions.

The sponsored projects office is responsible for following up on audit findings. This could include requiring the subrecipient to provide responses to the audit findings and a timely corrective action plan.

When an invoice has questionable expenses, sponsored projects may request the ledger of the subrecipient and other supporting documents before applying the invoice.

In conclusion, as with the management of any sponsored funding, internal controls, time management, and proper communication are the key ingredients to a successful collaboration with a subaward recipient. Each partner in the consortium, internal and external to both institutions, plays a role in maintaining a solid, compliant relationship.

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REGULATORY & COMPLIANCE OVERSIGHT

Conflict Resolution in Research: Turning Friction into Collaboration

By Rani Muthukrishnan, PhD, & Anita Trupiano, MS

In research, conflict is inevitable—but it doesn't have to derail progress. From protocol disputes to scheduling strains, learn how active listening, shared goals, and proactive communication can transform tension into teamwork, protecting participants, strengthening trust, and keeping studies on track. Collaboration is the real breakthrough.

Research is built on partnerships, collaborations, and teamwork. Investigators, sponsors, regulatory bodies, and clinical staff often have competing priorities—and those competing priorities can spark friction. A sponsor may be pushing for faster recruitment, while a principal investigator (PI) emphasizes patient safety. Clinical staff may juggle overloaded schedules, while regulatory teams are laser-focused on compliance. Handled poorly, these conflicts slow down studies, frustrate teams, and damage credibility. Handled well, they can strengthen collaboration and keep research moving forward.

Scenario #1:

PI vs. Sponsor; The Protocol Timeline Dispute

The conflict: A sponsor wants to accelerate recruitment to meet corporate milestones. The PI pushes back, citing concerns about patient safety and staff capacity. Meetings grow tense, and emails start sounding defensive.

Resolution approach:

- **Active listening:** The PI clarifies that safety monitoring requires specific turnaround times for lab results. The sponsor explains financial pressures tied to trial milestones.
- **Framing around shared goals:** Both sides agree patient safety is non-negotiable and that regulatory compliance protects them all.
- **Practical compromise:** Adjust recruitment targets to allow staggered enrollment. Build in mid-study reviews to revisit the timeline.

Solutions:

- Stagger enrollment in smaller cohorts with built-in safety reviews.
- Revise monthly recruitment targets to match staff capacity.
- Add biweekly PI–sponsor check-ins to monitor progress and adjust early.

Outcome: The sponsor sees the PI as a partner protecting long-term study credibility. The PI gains trust by showing flexibility without compromising safety.

Scenario #2:

Clinical Staff vs. Patient Scheduling Conflicts

The conflict: Patients are scheduled for study visits that overlap with already packed clinic calendars. Nurses feel overburdened. Patients become frustrated by delays.

Resolution approach:

- Surface the real issue: Staff aren't resistant to research — they're stretched thin by clinical duties.
- Shared outcome focus: Everyone wants patients to have a positive experience and for study data to remain clean.

Solutions:

- Create a joint scheduling grid that integrates both clinic and research calendars.
- Assign a research coordinator as the point person to manage visit logistics.
- Allow limited use of telehealth follow-ups when protocol and regulations permit.

Outcome: Less staff burnout, smoother patient flow, and higher participant retention.

Scenario #3:

Regulatory Team vs. Investigators

The conflict: Investigators perceive regulatory staff as "the study police," while regulatory teams feel ignored when protocol deviations occur.

Resolution approach:

- Shift the framing: Emphasize that regulatory oversight protects participants and safeguards the investigator's reputation and the sponsor's investment.
- Collaborative education: Hold joint workshops where investigators and regulatory staff walk through common compliance pitfalls and solutions.
- Proactive communication: Create a quick "heads-up" channel for investigators to flag potential deviations before they escalate.

Solutions:

- Host short joint compliance workshops to review common pitfalls and share solutions.
- Set up a quick "heads-up" reporting channel (email alias, Teams/Slack chat) for investigators to flag potential deviations early.
- Develop a one-page "compliance cheat sheet" that highlights frequent problem areas and simple steps to prevent them.

Outcome: Regulatory staff are seen less as enforcers and more as allies. Investigators feel supported, not scrutinized.

Across these scenarios, a few core tools consistently turn conflict into collaboration. Conflict resolution in research isn't just about avoiding tension — it's about advancing science responsibly, protecting participants, and sustaining the collaborations that make discovery possible.

Core Tools for Conflict Resolution in Research

1. Active Listening – hear the concern beneath the frustration.
2. Reframing – bring the conversation back to patient safety, compliance, and data integrity.
3. Shared Outcomes – highlight the common ground: successful, credible research.
4. Flexibility – seek compromises that protect essentials without stalling progress.
5. Proactive Communication – surface issues early before they harden into conflict.

Why It Matters

Conflict in research is inevitable. What defines successful teams isn't the absence of conflict, it's the ability to resolve it constructively. By approaching disagreements with respect, clarity, and a focus on shared goals, research teams can:

- Keep studies on track.
- Protect participants and data integrity.
- Build professional credibility and lasting collaborations.

When teams address conflict responsibly, they strengthen collaboration and ultimately advance science. A shared understanding that we are all working toward the same goals fosters mutual respect and helps mitigate conflicts effectively.

We'd love to hear from you: which of these strategies resonates most in your research environment?

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OPERATIONS & WORKFLOW MANAGEMENT

The Use of Generative AI in Research Grant Applications: Balancing Innovation, Transparency and Integrity

By Anita Sharma, PhD

GenAI is influencing research grant applications by aiding in drafting, data analysis, and knowledge mobilization, while emphasizing adherence to ethical standards, transparency, and confidentiality established by Canadian and U.S. agencies. The article highlights the community's responsibility to ethically integrate GenAI, balancing innovation with integrity and originality.

Generative Artificial Intelligence (GenAI) has been profoundly transforming the research enterprise, impacting researchers, funders and research administrators. The use of GenAI is increasingly viewed as a strategic necessity rather than an option for post-secondary institutions. AI tools hold great promise for revolutionizing research processes, from generating ideas and conducting literature reviews to data analyses and modelling, budget justification, and creating plain language summaries for knowledge mobilization. However, GenAI also presents potential risks.

For example, AI systems are trained on data that can change over time, which can impact their reliability (NIST AI risk management framework). Additionally, these systems can be biased, potentially amplifying false information and exacerbating inequities (Sharma & Harris, 2024). Understanding the risks and adopting human-centric, socially responsible, ethical, and sustainable approaches in AI development and use helps mitigate associated risks. The Government of Canada's guide on the use of generative artificial intelligence encourages users to follow FASTER principles: *Fair, Accountable, Secure, Transparent, Educated, and Relevant*, to reduce risks and ensure responsible use of AI.

However, there is still hesitation among the research community in adopting GenAI for conducting research, developing grant applications and in research administration. For the research community, the key question remains*: what is acceptable and what is not when using AI to develop, review, and manage grant applications?*

Canadian federal funding agencies' guidelines:

Canada's leading research funding agencies—CIHR, NSERC, SSHRC, and CFI—have clarified their guidance on the use of generative AI in the development and review of grant proposals. These guidelines are based on recommendations by a panel of external experts tasked by the three agencies and public consultations with the research community. The following two requirements, as outlined in the Tri-Agency Framework: Responsible Conduct of Research and the Conflict of Interest and Confidentiality Policy, guide the research community in the responsible use of AI tools:

1. The named applicant is ultimately accountable for the complete contents of their application.
2. Privacy, confidentiality, data security and the protection of intellectual property (IP) must be prioritized in the development and review of grant applications.

Development of grant applications: Researchers are permitted to use GenAI tools to draft, translate, and summarize parts of their proposals. However, the responsibility for thoroughly verifying the accuracy, completeness, and relevance of all GenAI-generated content rests with the researchers. The agencies require researchers to disclose AI use in their applications by citing and acknowledging all sources used in preparing their proposals. Ultimately, researchers are accountable for the integrity and quality of their final submissions. They should also be aware of the risks involved in using GenAI tools, including potential threats to the confidentiality and privacy of their data input in publicly accessible AI tools.

Review of applications: Reviewers must not use online platforms to maintain the integrity of the review process. Entering applications into online AI tools could breach privacy and copyright protections. This would violate the *Conflict of Interest and Confidentiality Agreement for Review Committee Members, External Reviewers and Observers*. Therefore, the use of publicly accessible online tools for assessing grant applications is strictly forbidden.

It is implied that similar privacy and confidentiality standards, along with the responsibility to protect research data and IP, also apply to research administrators when handling personal and sensitive information.

The U.S. major funding agencies' policies:

While Canadian funding agencies have provided guidance, major U.S. funders have already established policies governing AI use in grant development and peer review.

1. To ensure fairness and originality in NIH research applications, NIH's new policy on the use of AI takes effect on September 25, 2025. Under this

policy, NIH will not consider applications that are significantly developed by AI or contain sections substantially created by AI. NIH also prohibits GenAI in peer review.

2. The NSF prohibits reviewers from uploading any proposal content to public AI tools, viewing this as a breach of confidentiality and the integrity of the merit review process. However, the NSF encourages applicants to disclose AI use in their proposal development. Canadian teams co-applying to U.S. programs and Canadian reviewers should be aware of these restrictions.

These guidelines aim to balance innovation, transparency, accountability, and streamline administrative efforts, while upholding high research standards.

Using GenAI in Research Proposal Development: Applying the FASTER Principles

A wide range of free and commercial GenAI tools are available, with new functionalities emerging constantly. An increasing number of Canadian post-secondary institutions, including the University of Saskatchewan, Thompson Rivers University, the University of Victoria, McGill University, the University of Ottawa, the University of Toronto, and the University of Manitoba, have approved the use of Microsoft Copilot within their internal systems, relative to other GenAI tools. These deployments prioritize data privacy, ensuring that user inputs and outputs remain securely within the institution's infrastructure and are not used to train public models (Microsoft 365 Copilot). However, users must still avoid entering personal and sensitive information. Consult the Office of the Privacy Commissioner of Canada's guidance to understand how your personal data is protected and what safeguards are in place to ensure responsible use. Examples of low-risk, high-value applications in research grant applications (when no confidential data is involved) include:

1. **Literature scan and synthesis:** GenAI can analyze extensive literature and automate time-consuming research tasks, such as summarizing papers and extracting data (e.g., Elicit.com, Research Rabbit, Scholarcy, Typset.io).

2. **Ideation and templating:** GenAI tools can be effectively used for ideation, refining research questions, formatting bio sketches, standardizing references, templating knowledgemobilization and EDI sections, and converting reviewer feedback into revision plans.

3. **Plain language summaries for knowledge mobilization and impact:** GenAI tools can assist in translating complex academic discoveries and outcomes into clear, accessible language to improve readability. This broadens accessibility and encourages greater public participation, thereby increasing the overall impact of the studies. However, it remains the responsibility of researchers to fact-check outputs and ensure cultural appropriateness. For example, when Indigenous data or knowledge are involved, researchers must adhere to OCAP (Ownership, Control, Access, Possession) and CARE (Collective Benefit, Authority to Control, Responsibility, Ethics) principles from the beginning.

4. **Data analysis and creating budget templates**: The built-in Copilot access in an Excel spreadsheet can be utilized for creating budget templates and data analysis.

5. **English and formatting:** Tools such as Grammarly can help writers to improve the readability of their proposals for sentence structuring and flow.

The University of Saskatchewan has curated a set of resources to support ethical and effective use of AI in research. Readers are encouraged to visit the site.

Visualizing GenAI Use in Research: Transparency Through HMC Icons

As technology increasingly blurs the line between human and machine intelligence, it is essential to recognize the extent of GenAI involvement in research. The Dubai Future Foundation (DFF), through its whitepaper, has introduced a classification system to visually represent the WHAT and HOW of evolving human-machine collaboration (HMC) in research, its design, and publications. These HMC icons, ranging from “all human” to “all machine,” provide a simple visual representation of machine involvement in research, including ideation, literature reviews, design, data collection and analysis, translation and writing, and research outputs (academic papers, technical reports, videos, art, educational materials, and other multimedia content). While not mandatory, the use of these icons is encouraged to enhance transparency and clarity.

GenAI in Research Administration: Enhancing Efficiency Responsibly

Research administrators can leverage institutionally approved GenAI to streamline both pre- and post-award administrative processes by automating routine tasks. In the pre-award stage, they can use GenAI to analyze and summarize lengthy funding announcements, match them with researchers’ expertise, and automate the sharing of this information with faculty and colleagues. GenAI tools can help draft and edit documents, create and refine presentations, generate images for presentations, summarize documents, email threads, and meeting notes, as well as translate information (Government of Canada’s Guide on the use of generative artificial intelligence). Various tools are being explored to better support researchers, such as verifying proposals for completeness and formatting compliance. Gen AI tools can also automate post-award activities, including compliance checks, report drafting, risk monitoring, and project management (Mkabane & Kinkigi, 2024). However, research administrators must be mindful of ethical safeguards, data privacy, and institutional policies when using these tools.

1. **Cautions for the Research Community Confidentiality breaches**: The research

community must avoid uploading sensitive information to online AI tools, as this risks compromising data confidentiality and violating academic integrity.

2. **Concerns about plagiarism, ghostwriting, and originality:** Funders expect proposals to highlight the applicant's own ideas. Over-reliance on AI tools can foster plagiarism and diminish innovation, novelty, and creativity.
3. **Hallucinations and subtle factual errors:** GenAI tools may facilitate citations, exaggerate novelty, or obscure methodology which can compromise proposal quality.
4. **Privacy legislation compliance:** Drafting proposals with research participant data, even "just metadata," can trigger obligations under PIPEDA and FIPPA. It is essential to de-identify data whenever possible and keep any identifiable information off public AI tools.
5. **Indigenous data sovereignty:** Using open-data approaches in Indigenous contexts can be harmful. The OCAP and CARE principles require jointly developed governance, not just ticking consent boxes. This raises a bigger question about whether AI systems can be trained on community data at all.

Takeaways: For the research community, AI is neither a shortcut to better science nor a threat to be avoided all together. When used thoughtfully and in alignment with **principles of disclosure, confidentiality, ethics, privacy law, and Indigenous data sovereignty**, it can be a powerful tool for ideation, editing, and administrative efficiency **The research community should develop a foundational understanding of GenAI's benefits, limitations, and responsible use.**

Acknowledgement: The author used Microsoft 365 Copilot to summarize information from publicly available sources and to edit this document. The author does not endorse any AI tools mentioned in this write-up. Additionally, as AI technologies continue to evolve, the guidance of funding agencies may also change.

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CAREER GROWTH & LEADERSHIP

Communicating to Make a Point: Centering Learning Outcomes to Optimize the Abstract and Enhance Your Delivery in Presentations

By Saiqa Anne Qureshi, PhD, & Lucy Donaldson

Research administration, like any other profession, is a field that relies on clear and efficient communication—including the transfer of knowledge through conference sessions and presentations. With a strong foundation, dynamic design, and effective summarization skills, you can maximize the impact of your next presentation to communicate what matters the most.

Have you ever attended a conference session and the content did not reflect what it said on the schedule?

Were you unsuccessful in your abstract submission, only to see the conference program and wonder where you went wrong?

Did the presentation you attended not meet the stated objectives or have learning outcomes?

It is critical to have learning outcomes for any presentation. Simply put: what do you want those attending to come away with at the end of your presentation? This will help you be successfully selected and, should you be selected, to ensure that those attending are satisfied with the presentation at the end.

Developing a Compelling Abstract: The Foundational Overview

The abstract serves as the initial description for any training session, functioning as a concise summary and an invitation to potential participants.

Effective abstract development addresses the fundamental questions:

- What is the principal objective of this session?
- Who is your target audience, and what is their expected level of knowledge about your presentation subject matter?
- Crucially, what tangible benefits will attendees have by attending your session?

An easy way to address all these points is to frame your abstract like an elevator pitch: you've got about 250 words to clearly set the scene, explain the problem, and showcase your solution. By doing this, your presentation shows a clear learning trajectory for attendees.

Before you can entice people to attend your session on the program schedule, first you must convince the expert panel assessing your abstract that it is aligned to the conference themes and goals and will add value for the audience.

The primary objective of your abstract is to articulate the core value proposition of the session. Use plain language and clearly explain what participants will gain from your session.

Formulating Precise Learning Outcomes: The Pedagogical Blueprint

A well-structured abstract will help you at the next stage to be engaging, with a high-quality presentation design.

It's likely you've experienced a presentation when the presenter gets stuck in unnecessary detail, or there are too many slides, or the slides are poorly designed and packed with words. Or perhaps you thought you'd be learning about one thing, but the presentation is going in a completely different direction.

How can you avoid these common pitfalls? By structuring your presentation around learning outcomes. This is the most pivotal stage in the design of any presentation, and arguably the most overlooked. This shifts the focus from instructional delivery to measurable learner attainment, and this pedagogy is key in centering the attendee's learning.

In the beginning of your presentation, insert one slide outlining to the audience what it can expect. Use active, observable verbs (e.g., 'analyze,' 'apply,' 'consider,' 'evaluate,' 'explain') to provide a definitive roadmap for both content development and audience participation. This clearly provides guidance for the audience so it knows how to engage with your presentation and what to expect, and it should duplicate your abstract in terms of what learners are planning to attend. It also helps focus what content you include as you have clear learning objectives for the participants.

Enhancing Visual Communication with Slide Design

Slides function as visual complements to the verbal presentation, rather than exhaustive textual repositories. Simply put, don't write out the presentation on the slides! Their purpose is to augment comprehension, illustrate complex concepts, and provide a structured framework for the presentation.

The learning outcomes serve as a guide to the presentation structure. Consideration should be given to the logical progression of information, ensuring a coherent narrative flow between slides.

Once you've designed the content, edit it liberally. A minimalist approach to slide content often proves most effective, allowing your narration when presenting to provide the requisite depth. Less content on the screen is usually more impactful and can lead to better content comprehension. Well-paced and designed slides will likely pique people's interest, lead to more questions, and hopefully spark conversations after your presentation.

Incorporation of diverse visual elements, such as images, infographics, and brief video segments, can accommodate varied learning preferences. Opportunities for active engagement or reflection can be strategically embedded within the visual design (e.g., polls, word clouds, even a "show of hands" to indicate agreement).

Each slide must possess a discernible purpose and directly correlate with the stated learning outcomes. Ask yourself:

- Would someone that knows nothing about this content understand this?
- Why am I sharing this information with the audience, and what is the point?
- What is the most important detail on this slide?
- And critically, how does this support the learning outcomes, and are my attendees leaving having achieved those?

And remember, no one knows your content as well as you, so keep your learning outcomes and audience knowledge level in mind when designing the amount of detail and progression of content.

Tip: There are dozens, if not hundreds, of free and paid digital platforms and AI-enhanced services that can take your content and create impactful visuals, concise bullet points, and modern layouts. Use them!

Ending with a Bang: Articulate Key Takeaways

A simple way to reinforce your key messages for the audience is to provide a single slide at the end of your presentation that condenses the takeaway messages as a summary, considerations, or future actions.

The amount of key messages will change depending on the session time and your content but, generally, a minimum of three and maximum of five are memorable for most audiences. These should be directly linked to the established learning outcomes.

For example, salient takeaways could be:

- Learning outcomes are foundational to compelling abstracts and engaging presentations.
- Keep your audience's knowledge level in mind when designing the content detail and progression .
- Visual aids should complement, not replace, primary content.

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A Final Note

As you turn to this last page, we hope the stories and insights inside have sparked new ideas and connections, leaving you inspired.

Research administration is a field built on collaboration. Your engagement, as well as your dedication to the profession, ensures we continue to grow stronger together.

Thank you for being part of our journey. Until next issue—keep building, keep connecting, and keep leading.

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