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.

APRIL 2026

VOLUME 02 | ISSUE 01

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Indirect Cost Recovery and its Impact on Research Funding

From Quiet Wins to Career Visibility: How Research Administrators Can Tell Their Stories

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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.
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Introduction

The Society of Research Administrators International proudly presents the *Catalyst Quarterly*: a specially recurring magazine edition of our digital 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, we strive to advance SRAI's mission to empower research administrators with the knowledge, resources, and community needed to excel, collaborate, and drive impactful research worldwide. We encouirage our global community to always continue innovating—driving excellence and discovery, together.

SRAI
SOCIETY OF RESEARCH ADMINISTRATORS INTERNATIONAL

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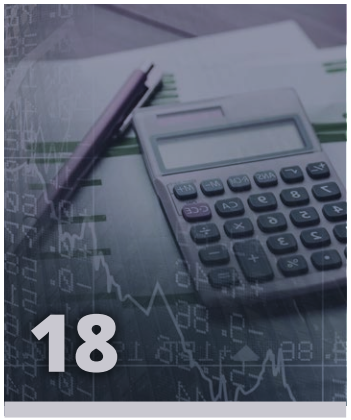

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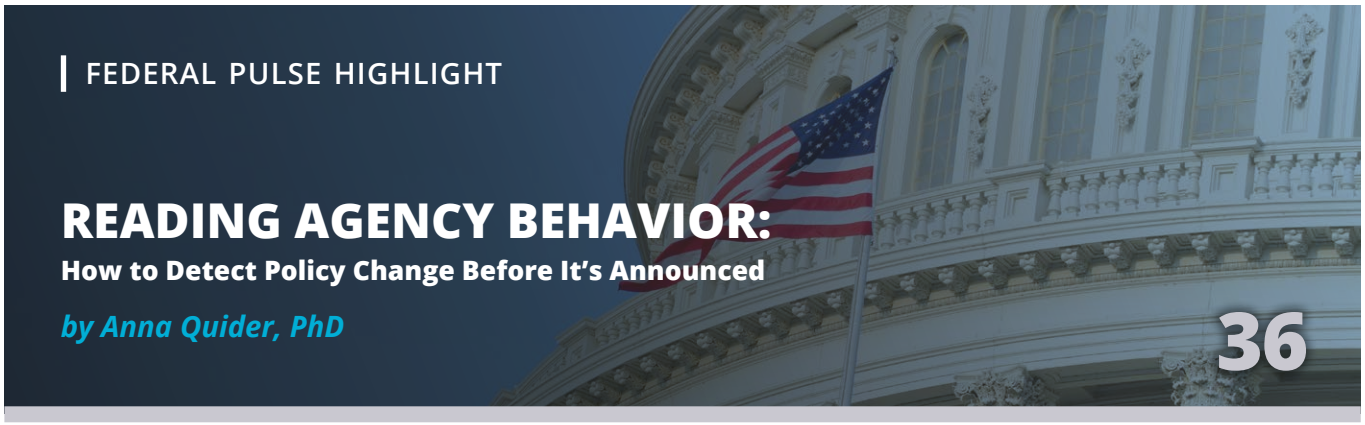

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Finding Direction

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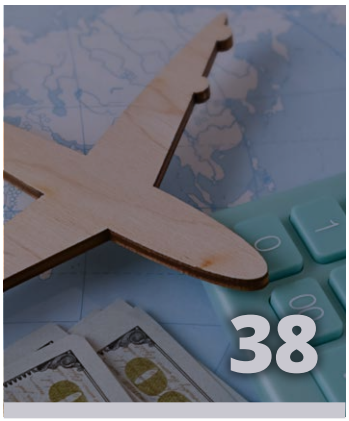

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Editor's Note

Dear Readers,

I am delighted to introduce the first issue of volume 2 of the *Catalyst Quarterly*. We started our journey at the beginning of last year with a lot of ambiguity surrounding the reception of this new magazine format. Since then, the number of submissions has been consistently growing, resulting in a significant increase in the publication's reach and impact. We couldn't be more pleased going into this second volume.

2025 was a year of major changes in our field, and as all of us regain our footing, it's important to remember the fundamental knowledge that shapes our profession. As such, this issue covers essential topics of compliance, research security, indirect costs, and budget planning, amongst others. We also include articles on day-to-day skills and idiosyncrasies that make research possible: strategic time management, effective communication, and navigating the convoluted aspects of travel cost management.

A big thank you to the *Catalyst* editorial team for their consistent dedication and creative efforts — they are the true backbone of this publication. And a warm welcome to the new feature and copy editors joining us this year. Their eagerness to contribute reflects the collaborative and innovative nature of our profession.

We couldn't do this on our own! Therefore, I would like to remind our readers of the value in sharing our stories and celebrating our wins, especially in times of change and uncertainty. After all, the voices represented in this issue are proof that words hold power. I invite you to join them by contributing your unique stories and experiences to the *Catalyst*. Thank you for reading!

Farida Lada
Editor, *Catalyst*

Farida Lada, PhD, MBA

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Farida previously served as Associate University Provost for Research Administration and Compliance at the City University of New York (CUNY). Farida was also the Founding Academic Director of the Master's and Advanced Certificate Programs in Research Administration and Compliance programs at CUNY School of Professional Studies. Prior to that, Farida was the Director of Research Compliance at Weill Cornell Medical College in Qatar. Farida has a PhD in Governance and Policy Analysis and an MBA.

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REGULATORY & COMPLIANCE OVERSIGHT

Research Compliance at a Crossroads: Export Controls, Research Security, and What Every Administrator Must Know

By Rani Muthukrishnan, PhD

Picture this: A faculty member comes to you excited about a new collaboration with an overseas university. The funding looks great. Science is solid. But buried in the agreement is a line that says the sponsor must approve all publications before release. Do you flag it or let it slide?

Right here is where your role as a research administrator matters the most. And it happens more often than most of us would like.

Export controls were once a niche concern, handled by a small group of specialists at a handful of major research universities. That is no longer true. Today, the rules touch every institution that receives federal research funding. They show up in contract reviews, in hiring decisions, in study abroad programs, and in the day-to-day management of international collaborations. If you work in research administration, this is your world, too.

This article explains what export controls are, how federal research security policy has grown around them, and most importantly, what you need to be looking for in your own work.

The Regulatory Framework: A Plain-Language Overview

Two sets of regulations form the backbone of U.S. export control law for universities.

The Export Administration Regulations (EAR) (15 C.F.R. Parts 730–774) cover dual-use items — technologies that have both civilian and military applications. The EAR are administered by the Bureau of Industry and Security (BIS), within the Department of Commerce, and are grounded in the Export Control Reform Act of 2018 (50 U.S.C. §§ 4801–4852). Items covered by the EAR appear on the Commerce Control List (CCL), found at 15 C.F.R. Part 774, Supplement No. 1.

The International Traffic in Arms Regulations (ITAR) (22 C.F.R. Parts 120–130) cover defense articles and services designed specifically for military use. The ITAR implement the Arms Export Control Act (22 U.S.C. § 2751 et seq.) and are administered by the Department of State. Controlled items appear on the United States Munitions List (USML) at 22 C.F.R. § 121.1.

Three entities have mandated oversight over enforcing U.S. export control laws in the context of academic research:

The Office of Foreign Assets Control (OFAC) within the Department of the Treasury administers economic sanctions programs (31 C.F.R. Chapter V) that can restrict transactions involving certain countries, organizations, or individuals. Sanctions can come into play even when a project seems entirely academic.

Bureau of Industry and Security (BIS), located within the Department of Commerce, administers the Export Administration Regulations pertaining to 15 CFR Parts 730–774 dealing with certification of collaborators and contractors.

U.S. Department of State – Directorate of Defense Trade Controls (DDTC) has the authority to administer and enforce ITAR. The DDTC Issues export licenses and oversees transfers of defense articles and technical data.

Here is one concept that catches many administrators off guard: *you do not have to physically ship something overseas for an export to occur*. Under both EAR and ITAR, sharing controlled technology or technical data with a foreign national — even inside the United States — can count as an export. The EAR calls this a "deemed export" (15 C.F.R. § 734.13(b)). The ITAR uses similar language in its definition of export (22 C.F.R. § 120.17). Because universities employ so many

international students and visiting researchers, this concept has real, daily relevance to your work.

The Fundamental Research Exclusion — and How You Can Lose It

Most university research does not require an export license, thanks to the fundamental research exclusion (FRE). Both EAR (15 C.F.R. § 734.8) and ITAR (22 C.F.R. § 120.34) exclude basic and applied research from export control restrictions when the results are intended for publication and broad sharing within the scientific community.

This is good news for open science, but the exclusion is not automatic, and it is not permanent. Research can lose its FRE status under two common conditions:

- A sponsor or funder places restrictions on publication. For example, sponsor requires prior approval before results can be released.
- An institution accepts nationality-based restrictions on who can participate in the research.

Both situations come directly through the contract review process. That is why research administrators play such a critical role: you are often the first person to read these agreements carefully enough to catch problematic language. A clause that seems minor can transform an open research project into one that triggers export control requirements.

If you are unsure whether a provision creates a problem, that is exactly when you escalate to your export control office. This is not a gray area you want to navigate alone.

Cases That Changed How Universities Think About Compliance

The regulatory stakes are not theoretical. Several federal enforcement cases have directly involved university researchers, and the lessons they teach are worth knowing.

Thomas Butler — Texas Tech University (2003)

Butler, a faculty member at Texas Tech, was prosecuted after shipping samples of *Yersinia pestis* (bacterium that causes plague) to Tanzania without a required export license (Tanne, 2003). The case was a wake-up call for institutions conducting public health and biological materials research. Export controls apply to physical materials, not just information and technology.

John Reece Roth — University of Tennessee (2008)

This case is still cited as a landmark example of deemed export enforcement. Roth, a professor at the University of Tennessee, was convicted of violating the Arms Export Control Act and ITAR after sharing controlled technical data from an Air Force research project with graduate students from China and Iran — without obtaining the required export authorization. He was sentenced to four years in federal prison. The students were present in the United States. The data never left the building. And it is still counted as an export (U.S. Department of Justice, 2008).

Franklin Tao — University of Kansas (2019)

Tao, a chemical engineering professor, was charged in 2019 with failing to disclose a potential affiliation with Fuzhou University while conducting federally funded research. A jury initially convicted him on four of eight counts in 2022. A judge then overturned the wire fraud convictions. In July 2024, the 10th U.S. Circuit Court of Appeals reversed his final remaining conviction as well, finding that prosecutors had not shown the false statement was material to any federal funding decision (10th U.S. Circuit Court of Appeals, 2024). All convictions have now been overturned. Tao's case has not only become a symbol of the risks of overreach, but also a reminder that the underlying policy question (did you disclose everything?) is one every researcher must take seriously.

Yi-Chi Shih — UCLA (2019)

Shih, an adjunct professor of electrical engineering, was convicted in June 2019 on 18 counts for illegally exporting military-grade semiconductor chips to China. He used a Hollywood Hills company he controlled to funnel funds from Chinese entities, concealed his true intentions from a U.S. chip manufacturer, and worked with a Chinese firm later found to have been involved in military weapons development (U.S. Department of Justice, 2019). He was ultimately sentenced to over five years in federal prison. The case illustrates that export control violations can involve complex schemes, and carry serious consequences.

Charles Lieber — Harvard University (2021)

Lieber, the former chair of Harvard's Chemistry and Chemical Biology Department, was arrested in January 2020 and convicted in December 2021 on six felony counts, including making false statements to federal investigators about his participation in China's Thousand Talents Program and his undisclosed affiliation with the Wuhan University of Technology. He also failed to report income and a foreign bank account. The case underscored the federal government's serious focus on disclosure — not just technology transfer (U.S. Department of Justice, 2021).

Anming Hu — University of Tennessee (2021)

Hu, a mechanical engineering researcher, was charged with wire fraud and false statements related to alleged nondisclosure of ties to a Chinese university (U.S. Department of Justice, 2020). After two mistrials and significant controversy, he was acquitted in September 2021. The case raised important questions about due process and the risks of prosecution based on thin or misinterpreted evidence. It also showed that even an acquittal can derail a researcher's career.

EAR vs. ITAR — A Quick Guide for Research Administrators

EXPORT ADMINISTRATION REGULATIONS (EAR)

The EAR cover dual-use items — things that have both civilian and military uses, like advanced computing equipment, certain sensors, and some biological materials. The EAR are administered by the Bureau of Industry and Security (BIS) within the U.S. Department of Commerce. Most university research that touches export controls will fall under the EAR rather than ITAR.

INTERNATIONAL TRAFFIC IN ARMS REGULATIONS (ITAR)

The ITAR covers defense articles and services designed specifically for military use. These items appear on the United States Munitions List (USML). The ITAR restrictions are stricter than EAR requirements. Sharing controlled technical data with a foreign person generally requires government authorization. Research under defense contracts or involving military-specific technologies is more likely to fall under ITAR.

Bottom line: When in doubt, check. Your export control office is your best resource.

Key Takeaways for Research Administrators

- Review sponsored research agreements for publication restrictions or nationality-based participation limits which may eliminate the fundamental research exclusion. Talk to your Export Controls Officer.
- Know which agency administers the research. Defense contracts are more likely to trigger ITAR or OFAC. All others are more likely EAR.
- Understand your institution's foreign national access procedures. Who gets access to what, and have they been reviewed for deemed export concerns?
- Make sure your PIs complete the required research security training before proposal submission, especially for NSF, NIH, and DOE funding.
- Disclose foreign affiliations. Every time. This is not optional, and enforcement is real.
- When something feels off: a collaboration that seems too eager, a sponsor who wants to limit publications, flag it for export controls review. Trust your instincts and loop in your export control or research compliance office.

The China Initiative and Its Aftermath

Many of these cases unfolded under the DOJ's China Initiative, launched in November 2018 to address economic espionage and technology theft linked to China. Universities became a significant focus because of their role in federally funded research and advanced technology development.

The initiative was formally ended in February 2022, following criticism from academic organizations, civil rights groups, and scientists who argued that it had a chilling effect on international collaboration and risked targeting researchers based on ethnicity rather than evidence. Multiple cases under the initiative collapsed in court.

But the underlying concerns about foreign influence in research have not gone away. They have simply been reframed into a broader research security agenda — one that applies to all institutions, not just those doing defense-related research.

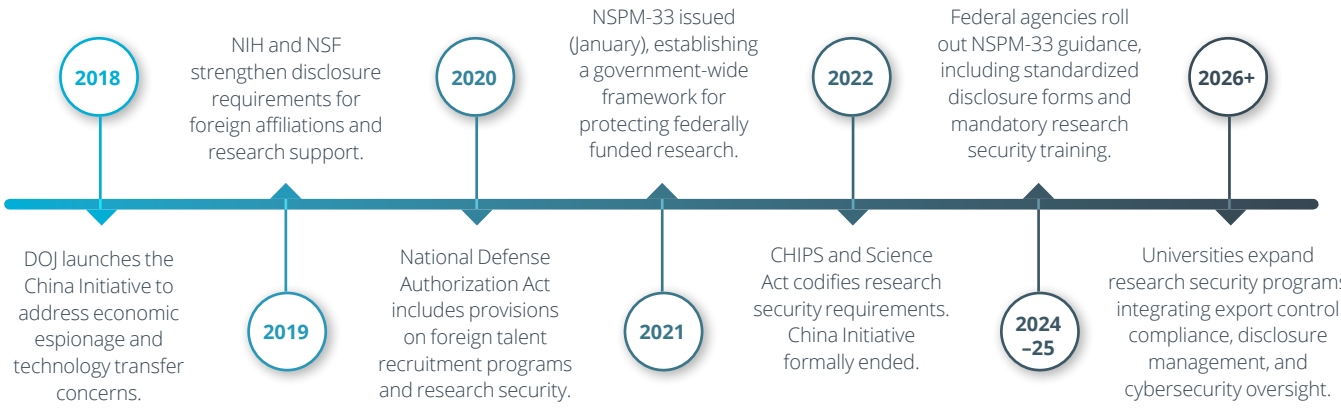
NSPM-33, the CHIPS Act, and What They Require

In January 2021, the White House issued National Security Presidential Memorandum-33 (NSPM-33), establishing a government-wide framework for protecting federally funded research (White House Office of Science and Technology Policy, 2021). The goal was to balance national security concerns with the openness that makes U.S. science strong.

NSPM-33 required federal agencies to standardize disclosure requirements for researchers and directed institutions receiving federal funding to build research security programs. These programs are expected to cover cybersecurity protections, oversight of international collaborations and travel, and research security training with export control awareness as a central component.

Congress reinforced these requirements through the CHIPS and Science Act of 2022 (Pub. L. 117-167).

Timeline: U.S. Research Security Policy (2018–2026)



Section 10634 of the law requires federal research agencies to ensure that individuals involved in federally funded research complete training on export controls, disclosure obligations, and protection of sensitive research information (U.S. Congress, 2022).

Federal agencies have moved quickly to implement this. The National Science Foundation now requires principal investigators and senior personnel to complete research security training before submitting proposals. More agencies are expected to follow. This is not a future requirement — it is a current one, and your institution needs a plan to meet it.

What This Means for Your Role

Export controls and research security are no longer the exclusive territory of specialized compliance offices. They are part of every research administrator's job — whether you work in pre-award, post-award, contracts, IRB administration, international programs, or sponsored programs leadership.

Here is where this work shows up in practice:

- **Pre-award review:** Identifying red-flag provisions in sponsored agreements: publication restrictions, foreign sponsor involvement, and nationality-based access limits.
- **International collaboration management:** Flagging partnerships that may involve controlled technologies or foreign government entities.
- **Personnel and access decisions:** Understanding when a foreign national's access to research materials may require a deemed export analysis.
- **Training coordination:** Ensuring PIs and senior personnel meet research security training requirements before submissions go out.
- **Disclosure management:** Helping researchers understand what must be disclosed on proposals to their institution and making sure it actually happens.

You do not need to be an export control lawyer to do this work well. You need to know enough to ask the right questions, recognize the warning signs, and get the right people involved at the right time. That is exactly the kind of judgment SRAI members bring to this profession.

Looking Ahead

The regulatory environment around research security is still evolving. Federal policymakers have placed growing emphasis on protecting emerging technologies such as artificial intelligence, quantum computing, advanced semiconductors,

and biotechnology. These are the areas where universities do foundational work.

New executive actions and agency guidance will continue to reshape what institutions are required to do. There is also real tension that needs careful management: the United States needs international scientific talent and global collaboration to stay competitive, but it also needs to protect sensitive research from foreign exploitation. Research administrators sit right at the center of that tension.

The institutions that handle this well will not be the ones that build the tallest walls. They will be the ones that build the smartest processes — with research administrators who understand the rules, ask hard questions, and help their faculty navigate complexity without shutting down the open exchange of ideas that define academic science.

That is work worth doing. And it starts with knowing the landscape.

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AI Statement

The author initially used ChatGPT to develop a cohesive outline for the article from an idea, but made substantial changes to the structure (e.g., including sidebars and boxes), and Grammarly for grammar edits to produce the final draft.

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REVIEW ARTICLE

Indirect Cost Recovery and its Impact on Research Funding:

Key Takeaways from a 2026 Report by Attain Partners

By Linda Dement, CRA, & Tamara Ginter, MBA, CFRA

When federal agencies announced the sweeping changes to the indirect rate recoveries, the Association of American Universities (AAU) and the Council on Governmental Relations (COGR) approached Attain Partners to conduct an objective analysis. Read below a brief review of Attain Partners' published report on Indirect Cost Rates and Recovery.

Indirect cost recovery was first introduced during World War II, and the *rate* of recovery has been a contentious topic ever since. In the 1950s, the National Institute of Health (NIH) limited the recovery of indirect costs to 15%. However, over time, this ceiling was removed, enabling full recovery for some entities via negotiated institution-specific rates. By 1991, the indirect administrative rates were capped at 26% for universities. In 2025, several federal agencies, including NIH, implemented 15% caps on indirect cost reimbursements, severely limiting funding for groundbreaking research.

This was in violation of the Consolidated Appropriations Act, where language protecting indirect rates was added in 2017. These actions led to multiple lawsuits, which were ultimately successful in suspending the 15% cap; the proposed language for the 2026 Consolidated Appropriations Act includes similar protections on negotiated indirect cost rates (Tom, 2025).

When federal agencies announced sweeping changes to the indirect rate recoveries last year, the Association of American Universities (AAU) and the Council on Governmental Relations (COGR) approached Attain Partners to conduct an objective analysis. Here are the 5 key takeaways from their published report on Indirect Cost Rates and Recovery (Attain Partners, 2026):

1. Universities under-recover (subsidize) a substantial portion of indirect costs not covered by the current indirect cost reimbursement process.
2. The reimbursement rate for universities is generally lower than private industry. This is mainly due to the 26% federal cap on administrative costs.
3. Federal and national labs (Government-Owned, Government-Operated [GOGO] and Government-Owned, Contractor-Operated [GOCO]) have higher indirect cost recovery rates than universities.
4. Private industry laboratories have uncapped indirect cost rates and fewer restrictions than universities, allowing them to prioritize profitability.
5. Comparing public and private universities, the difference in indirect rates are not from the Office of Management and Budget (OMB) rules or negotiation, but factors such as geographic location, research type and volume, and institution and/or state subsidy of indirect costs.

Negotiated rates can vary wildly from one entity to the next. While private industry has more flexibility in their overhead and G&A allocations, universities pay for administrative costs upfront and are limited to recovering only up to the 26% overall cap on the administrative rate. A 2023 Higher Education Research and Development (HERD) survey showed the impact of indirect cost recovery caps on COGR member universities. Data from the survey showed

that average administrative costs for universities are about 35.4%, which is 9% higher than the current 26% cap (National Center for Science and Engineering Statistics, 2023). In other words, universities under-recover actual costs, forcing them to absorb these costs and adversely impacting their research administration infrastructure. Meanwhile, national labs, private research facilities, and other entities can include most or all lab costs, personnel, and depreciate equipment in their indirect cost calculations, enabling higher administrative indirect recovery rates than universities. These takeaways underscore the distinct differences in the methodologies and cost recoveries between academic, federal and national laboratories, and private industry; this makes inter-entity comparisons difficult.

Nevertheless, there can be no doubt that universities are at a disadvantage. They must subsidize a significant portion of their indirect costs due to limitations that are not applicable to other research institutions. These upfront costs include building construction and renovation, operating expenses for these spaces, and salaries for personnel administering federal awards. Many of these expenses are not recoverable or have significant caps placed on them.

The full report covers additional information on the background of indirect cost process, including OMB circular reform, details of how indirect rates and recovery differ by entity, and the nuances of cost allocation in government funded research.

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E3. NIH Common Forms, SciENcv, & Submitting Successful Proposals: Are You Prepared to Navigate the Shift?

In a profession where funding is integral and at times uncertain, research administrators must remain ahead of the curve. In our latest episode, pre-award experts—Jose G. Alcaine, PHD, MBA, CRA, Director of Research Services & Affiliate Faculty at Virginia Commonwealth University, and SRAI Distinguished Faculty; and Simone Whitehead, Assistant Director, Sponsored Programs - PreAward, Department of Public Health Sciences at the University of Miami Miller School of Medicine—share practical guidance on navigating the adoption of NIH Common Forms ahead of the May deadline.

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CAREER GROWTH & LEADERSHIP

From Quiet Wins to Career Visibility: How Research Administrators Can Tell Their Stories

By Holly Zink, PhD, MSA

Strategic storytelling helps research administrators make their expertise visible without self-promotion. This article offers practical ways to translate everyday work into clear narratives that leaders recognize—supporting performance reviews, promotion conversations, and leadership development while reinforcing research administration as a strategic function.

Research administrators routinely make judgment calls, solve problems, and guide complex processes forward, often without drawing attention to the work itself. While this behind-the-scenes expertise keeps research moving, it can also make individual contributions difficult for leaders to see, particularly in performance evaluations, promotion discussions, and leadership planning (Jämsen & Sivunen, 2025). Strategic storytelling provides a way to bridge that gap. Storytelling in this context is not about self-promotion or embellishment. It is about translating expertise into language that decision-makers can recognize and act on. Many research administrators already tell stories informally—such as explaining why a decision was made, how a risk was avoided, or what was learned from a difficult situation. The opportunity is to make those narratives more intentional and more visible.

One practical starting point is reframing everyday updates. Instead of focusing solely on completed tasks, emphasize the decisions made and their impact. For example, rather than reporting that a submission was finalized, note how early issue identification prevented delays or how cross-unit coordination reduced institutional risk. These subtle shifts help others see the strategy embedded in routine work.

Task-only: "Three proposals were submitted this month, all on time."

Storytelling: "Three proposals were submitted this month. One required early clarification of sponsor guidance, which allowed the team to resolve eligibility questions before drafting began. Addressing that upfront helped the investigators focus on scientific alignment rather than last-minute administrative revisions."

Task-only: "Award setup is complete, and accounts are active."

Storytelling: "Award setup is complete. During the review process, we identified a potential cost allocation issue and worked with the department to address it early. Resolving that at setup helped ensure compliance and reduced the likelihood of budget revisions later in the project period."

Task-only: "Compliance requirements were reviewed with the research team."

Storytelling: "Compliance requirements were reviewed with the research team, with a focus on translating regulatory language into practical steps. By addressing common questions early, the team was able to proceed with greater confidence and avoid delays during implementation."

For research administrators seeking advancement or expanded leadership roles, storytelling becomes especially important (Felix et al., 2023). Promotion and leadership decisions are rarely based solely on effort; they depend on demonstrated impact and strategic alignment. When professionals articulate their work in terms of outcomes enabled, risks mitigated, and systems improved, leaders are better positioned to recognize that impact. Strategic storytelling translates "*I handled it*" into "*Here is what my expertise enabled or prevented.*"

Compelling storytelling also aligns individual contributions with institutional priorities. Framing work in terms of efficiency, compliance, collaboration, and sustainability helps leaders connect day-to-day actions to broader organizational goals (Justesen & Plesner, 2024). This alignment reinforces research administration as a strategic function essential to institutional success, not merely an operational necessity. Beyond visibility and advancement, storytelling supports sustainability in the profession. Naming quiet wins helps counter burnout by reconnecting professionals to the purpose behind their work. It reinforces that research administration is not simply about managing processes, but about enabling discovery, protecting integrity, and designing systems that allow others to succeed.

Storytelling does not require more meetings, additional tools, or extra time. It begins with noticing the moments where expertise made a difference and choosing to name them clearly and concisely. Over time, these stories shape how research administrators are perceived, how the profession is understood, and how leadership pathways are built. Together, quiet wins and intentional storytelling form a strong foundation for professional visibility and strategic leadership. When research administrators tell the story of their work, they do more than describe what they do, they define the value of the field itself.

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GRANT DEVELOPMENT & STRATEGY

Solid Fundamentals: Creating Durable Budgets in a Changing Funding Landscape

By Kimberly Read, PhD, MBA, CRA, & Jose G. Alcaine, PhD, MBA, CRA

For research administration professionals, the past year has been quite a discordant one. As a result, many PIs are unsure how to proceed with their proposals. This is a moment when we can help our PIs refocus on the fundamentals, such as strong budget development.

The past year has been particularly tumultuous in research administration, at times, even chaotic. Institutions and principal investigators (PIs) have lost critical funding due to rapidly shifting federal priorities, program closures, and increased scrutiny over certain terms used in funded narratives. Entire programs have been eliminated, subjected to significant budget cuts, or required to revise their specific aims midstream. As a result, many PIs are uncertain about how to move forward with new proposals, and some are hesitant to engage in grant writing at all with such an unpredictable landscape.

This is a moment when we, as research administrators (RAs), can help our PIs refocus on the fundamentals, the core principles of grant writing that make a proposal stand out, regardless of shifting priorities or political headwinds.

At the heart of every strong research proposal is a budget that not only aligns with the funding agency's requirements but also clearly demonstrates how the proposed science can be carried out both reasonably and responsibly.

So, let's talk about the fundamentals of budget development. The starting point is always the Request for Proposal (RFP). The RFP provides the framework for the budget, outlining key parameters. How many years will the project span? What is the total allowable funding across the entire period? How much may be requested each year? Are there limitations on indirect costs, aka facilities and administrative (F&A) costs?

A close reading of the RFP often reveals restrictions or costs that the sponsor will not support, such as international travel, tuition, or equipment purchases. The funding agency's broader guidelines and supplemental materials can also contain important details that influence what belongs in the budget. These documents frequently include nuances about cost allowability or special conditions and overlooking them can result in budgets that unintentionally fall outside the sponsor's requirements.

This first step of a detailed RFP review should clarify whether the proposed science, the actual scope of work, can realistically be accomplished within the available budget. It's not reasonable, for instance, to expect a research program to cure breast cancer with $2.5 million over three years. However, that same budget could feasibly support a project aimed at identifying barriers to healthy lifestyle changes among individuals diagnosed with breast cancer.

Likewise, if a PI requires a $200,000 piece of equipment to begin data collection in year one, but the first-year budget is capped at $250,000, this particular RFP may not be a good fit. It might still be workable if the PI has access to unrestricted funding, such as start-up funds, to cover a portion of the equipment purchase or personnel costs. This would be a cost share consideration that requires institutional approval. Alternatively, the research plan could be adjusted so that data collection begins six to eight months into the project, delaying the need to cover lab staff salaries on the project and freeing up more of the budget for the equipment purchase.

These early, pragmatic conversations between the PI and the RA are essential. They help ensure that the proposal is both feasible and competitive long before the writing begins.

In most proposal budgets, personnel costs make up the largest share of expenses. People are essential to accomplishing the specific aims, but they're also costly. An $80,000 salary often carries an additional 30–40% in fringe benefits. Graduate assistants may have lower fringe rates, but their tuition costs frequently must be included. When salary, fringe, and tuition are combined, the total can equal or even exceed the cost of a post-doctoral scholar. Some institutions may allow salary without tuition or offer tuition waivers through the university. Regardless of the approach, these expenses add up quickly, and while PIs understandably want to support their teams, each project has unique staffing needs that must be reflected accurately in the budget.

A strong budget includes only the personnel necessary to complete the scope of work. For example, is a statistician needed before data

> "Even a well-designed project can be undermined if the numbers don't match, especially when a miscalculation suggests a more optimistic financial outlook than the sponsor will allow."

are collected? Probably not, so that role may not need to be budgeted for all project years. However, many statisticians are also skilled methodologists, in which case they may contribute throughout the entire project. In such instances, the budget and/or budget justification should clearly articulate the dual roles. For example, "Dr. Stats will serve as the methodologist in year one to develop data collection procedures and as the statistician in years three through five to analyze the study data."

A well-crafted budget defines each team member's role clearly and aligns their responsibilities with the full-time equivalent (FTE) effort requested. This clarity helps ensure compliance, strengthens the proposal's credibility, and demonstrates thoughtful planning.

Another fundamental component of budget development is supporting the numbers you include. If you request $1,000 for postage, you must explain why. For instance, if you need to mail recruitment materials to secure study participants, demonstrate how you arrived at the requested amount. Show your math and your reasoning. For example:

> ***Our recruitment target is 100 participants. We anticipate mailing 300 first-class letters in each of years one through three to individuals who previously participated in studies conducted by our institute. First-class postage is $0.78 per letter; therefore, we are requesting $234 for each of the three years, totaling $702.***

Avoid padding your budget. If you need $702, request $702, not $1,000. That said, it is reasonable and often expected to include a modest escalation (typically 2–3%) for costs in subsequent years. Some states may require this escalation for salaries as a matter of policy or legislation.

Another important consideration in budget development is the bottom line. There is ongoing debate about whether a proposal's total budget should always reach the cap. Some argue that the goal is to leave no money on the table. If the allowable total is $1.5 million, then the budget should come in at $1.5 million. Others contend that coming close, but not all the way to the cap, demonstrates that the proposal contains no unnecessary padding. PIs and RAs land on both sides of this debate.

So, who's right? Probably neither entirely. Funding agencies do earmark specific totals for allocation and expect their internal budgets to balance. At the same time, grant writers must be responsible stewards of those funds, ensuring that every cost is reasonable and necessary for accomplishing the work. Ultimately, whether your final number is $500,000 or $498,542, what matters most is that your justification clearly demonstrates how each dollar is reasonable, allowable, allocable, and consistent with the project's needs. In other words, the budget matches with the scope of work.

As we wrap up our discussion on the fundamentals of budget development, it's equally important to highlight some fundamentals of writing. While the budget itself typically appears as a worksheet or spreadsheet, most RFPs also require a budget justification, a written narrative that explains what is included in the budget and why it is necessary.

Your budget justification should be clear, concise, and organized in the same order as the budget worksheet. Use headings and subheadings to indicate which section of the budget you are discussing. Strategic use of bolding or underlining can also help orient reviewers to key elements. Always check the RFP for page limitations, and do **not** use the budget justification as a workaround to include narrative content that exceeds the proposal's page limits.

The narrative should clearly justify each requested item and explain how it contributes to achieving the project's specific aims. You may present calculations in formula style (e.g., 2 hotel nights × $280 = $560) or in sentence form: "We are requesting support for two

hotel nights at $280 each, totaling $560." Tables can also be an effective way to present detailed budget components in a concise and reviewer-friendly manner.

Travel budgets, for example, often involve multiple cost elements and therefore benefit from a clear breakdown. If you are requesting $4,176 for a trip, what contributes to that amount? You may have registration fees, airfare, local transportation, meals, hotel costs, and mileage. While you could describe all of this in a paragraph, reviewers will typically find it much easier to scan in a simple table like the one below:

Mandatory Project Managers Meeting Washington, DC			
	Year 1	Year 2*	Year 3*
Flight	$483	$497	$512
Hotel (2 nights @ $282)	$564	$581	$598
Taxi ($50 each way)	$100	$103	$106
M&IE per diem (3 days at $68)	$204	$210	$216
	$1,351	**$1,392**	**$1,433**
*Includes 3% escalation	**Grand Total**		**$4,176**

It's worth noting that accuracy in both the budget and the justification can make a meaningful difference in the strength of a proposal. Ensuring that the numerical values presented in the budget align with those referenced in the narrative is an important part of maintaining clarity and consistency. Even a well-designed project can be undermined if the numbers don't match, especially when a miscalculation suggests a more optimistic financial outlook than the sponsor will allow.

In sum, strong budget development rests on a solid understanding of the funding announcement, thoughtful alignment of personnel and resources with the scope of work, and clear justification for every dollar requested. When RAs and PIs work together early and intentionally, they create budgets that are accurate, defensible, and fully supportive of the proposed science. By returning to these fundamentals of clarity, feasibility, and transparency, we position our proposals for success, even in an unpredictable funding landscape.

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The Eisenhower Matrix

By Mark Lucas, CRA

The Eisenhower Matrix is a time management tool that categorizes tasks based on urgency and importance into a four-quadrant grid, helping users prioritize and focus on what matters most.

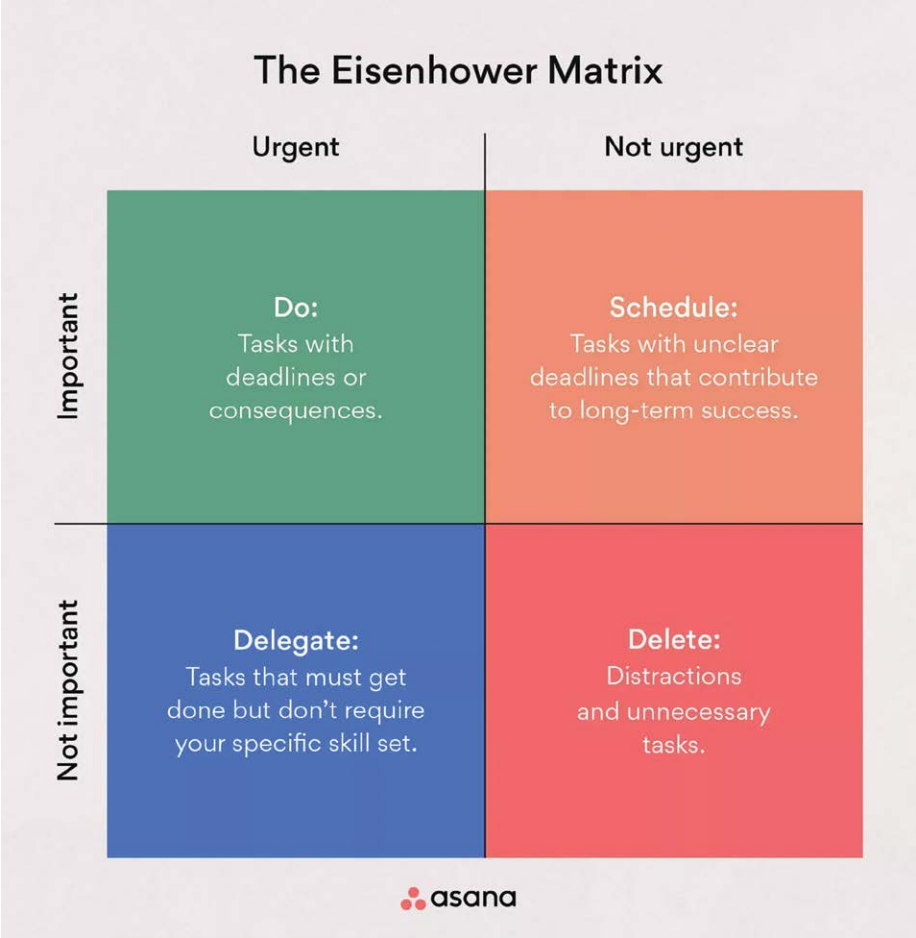
> ***"Who can define for us with accuracy the difference between the long and short term! Especially whenever our affairs seem to be in crisis, we are almost compelled to give our first attention to the urgent present rather than to the important future." — Dwight D. Eisenhower, 1961***

Dwight D. Eisenhower, the 34th President of the United States from 1953-1961, spent his career navigating high-stakes leadership roles. Before becoming President, he served as a general in the United States Army, as the Allied Forces Supreme Commander during World War II, and NATO's first Supreme Commander. Clearly, Eisenhower had to make difficult decisions in each of these roles, requiring him to constantly prioritize a staggering number of critical tasks. This finally led to the creation of the Eisenhower Matrix, which is used to this day to help busy professionals prioritize and manage tasks effectively.

The Eisenhower Matrix is a time management tool that helps categorize tasks into a four-quadrant grid based on urgency and importance, helping users prioritize and focus on what matters most. The four quadrants, from left to right, top to bottom, are as follows:

1. Urgent and Important (Do first), 2. Important but Not Urgent (Schedule), 3. Urgent but Not Important (Delegate), and 4. Not Urgent and Not Important (Eliminate).

On the right is a visual representation of the Eisenhower Matrix template (Tronier, 2025).



A variety of factors can influence us to subconsciously favor certain tasks when presented with a complex to-do list. We might prioritize tasks either based on timing of arrival, lowest hanging fruit (quickest or easiest to complete), or to quiet whomever is yelling the loudest. The matrix counteracts this inclination, helping users prioritize work by providing a broader perspective that distinguishes truly impactful work from tasks that are merely convenient.

So, how does one actually use the Eisenhower Matrix in practice? First, compile a complete list of tasks that need to be completed. Second, categorize the tasks as "Urgent," or "Not Urgent," and "Important" or "Not Important." Third, place each task into the appropriate quadrant based on its combined urgency and importance. Finally, take action based on the following guidelines:

1. Work on the tasks in Quadrant 1 first ("Urgent **and** Important")
2. Schedule time for tasks in Quadrant 2 ("Important, but **not** Urgent")
3. Delegate the tasks in Quadrant 3 ("Urgent, but **not** Important") to others who can feasibly complete them
4. Delete the tasks in Quadrant 4 ("**Neither** Urgent **nor** Important)

While this approach to categorization and prioritization may seem self-evident, a broad view of one's assignments can often help identify and eliminate unnecessary tasks that we may otherwise spend valuable time attempting to complete. However, use of this tool requires discipline.

While it can be tempting to focus on urgent tasks instead of important long-term ones, the goal when using this tool is to focus on the highest-level tasks, which can best be determined through a broader analysis. Taking a few minutes to prioritize tasks using this tool can naturally allow tasks to fall into a more logical and productive structure.

In research administration, the Matrix can be used by pre-award professionals to review and prioritize sections of an upcoming grant proposal, helping to determine the to-do list for the day. For example, finalizing the budget, which is usually both urgent and important, would take precedence and need to be completed first. Working on a faculty's biosketch in SciENcv, while important, may not be urgent and could be scheduled for later. Preparing and routing internal paperwork for approvals, while urgent, is not particularly important in that it does not require a specialized skill set to complete and could, therefore, be delegated to others. And analyzing grant submission trends in an internal tracking database, which is neither important nor urgent in the context of preparing a grant proposal for submission, could be deleted or set aside for a later day.

Similarly, for a post-award research administrator, finishing a NIH progress report due that week; an important but not urgent might be to finalizing a quarterly spending report for a PI meeting the following week uploading reports to shared internal financial system–urgent, but not important–could be delegated; and archiving old unfunded proposals, which is neither urgent nor important, could be ignored. In this way, spending time to map out and prioritize functions could help mitigate the stress that results from approaching every task, no matter how trivial, with the same sense of urgency.

The Eisenhower Matrix is highly adaptable, whether you prefer digital tools or a simple paper and pen. There are many specialized apps and platforms like Monday.com that can help facilitate the process. Nevertheless, what is most important is the underlying method of categorization and prioritization, rather than the specific tool utilized to get there. For research administrators, developing a systematic awareness of priorities is essential for increasing both clarity and overall productivity.

For a man recognized for his leadership during World War II, the D-Day invasion, and the creation of the U.S. Interstate Highway System, the lasting impact of the Eisenhower Matrix is a truly unexpected but invaluable addition to his legacy.

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COMMUNITY & MEMBER ENGAGEMENT

How Volunteering Shaped My Career in Research Administration: A Personal Reflection

By Olumide A. Odeyemi, PhD

Volunteering can offer so much more than just a way to give back to your community; it's a pathway to skill development, leadership experience, and meaningful professional connections. Through volunteer and leadership roles within various organizations throughout the years, I found great success and fulfillment within my career while supporting and elevating the field of research administration on a global scale.

Volunteering within research management professional societies is a meaningful way to give back to the profession while developing valuable skills that support long-term career growth and professional development. Organizations such as the Society of Research Administrators International (SRAI), the Australasian Research Management Society (ARMS), and the National Council of University Research Administrators (NCURA) rely heavily on volunteers for leadership, committee service, content development, mentoring, and knowledge sharing, helping to sustain the professions collective strength.

> Collectively, my volunteer experiences have significantly enriched my professional journey, strengthened my communication and leadership capabilities, enhanced my financial management and interpersonal skills, expanded my professional network, and kept me informed about sector developments.

My involvement in these societies as a volunteer since January 2022 has been instrumental to my development as a research administrator, and I have derived many benefits from these roles.

My first volunteer role was with NCURA, where I served as a member of the Global Collaborative Community Working Group, creating and contributing content to NCURA's professional networking communities. This experience expanded my understanding of global research management practices and enabled meaningful professional connections, including with colleagues in Australia. I also served as a Campus Liaison, a NCURA Newsletter distribution role, strengthening my communication and networking skills and keeping me informed about emerging developments in research administration.

In June 2022, I joined the ARMS State Chapter Committee and later became co-convener. I helped co-rebuild the leadership committee and reactivate the Chapter's activities as we worked to revitalize the society following the COVID-19 pandemic. As the northern campus representative, I coordinated regional activities while supporting overall Chapter operations and working to re-engage our members. Through these activities, I developed leadership, team coordination, event planning, and administrative skills. In addition, managing a Chapter budget of more than $10,000 annually and consistently maintaining a surplus further strengthened my financial management and record-keeping abilities.

I further developed my communication skills by delivering professional development webinars at both the state and national levels on career pathways in research administration and the effects of unsuccessful research funding outcomes on researchers. These webinars provided opportunities to present complex information clearly to diverse audiences.

In 2023, I wrote for the *SRAI Catalyst* and have since published six articles focused on career growth and professional development, collectively receiving more than 3,000 views and covering topics such as reflective practice, navigating career pathways, and skill acquisition in the research management profession. Writing for the *Catalyst* enhanced my written communication skills and enabled me to address knowledge gaps within the sector. I was subsequently invited to join the *Catalyst* Editorial Team as a Co-feature editor for the Career Growth & Leadership section and received two SRAI awards—Future of the Field and an Excellence Award, acknowledging my service and contributions to the profession.

Last year, I expanded my services through mentoring roles with the SRAI Odyssey Mentorship Program and the *SRAI Journal of Research Administration* (JRA) Author Fellowship Program. Working with mentees from diverse backgrounds improved my interpersonal and intercultural communication skills. Mentoring across time zones strengthened my

time management and organizational skills. These engagements also produced scholarly outputs, including a co-authored journal article with a mentee who has since published multiple research management articles, highlighting the broader impact of volunteer mentoring on professional development and knowledge dissemination.

Additionally, in 2024 and 2025, I served as a Volunteer Expert Evaluator reviewing session abstracts on topics including research culture, ethics and governance, research security, research impact, capacity building in grant development, and the full research administration lifecycle. This work deepened my understanding of emerging trends and innovations and enhanced my analytical and critical evaluation skills.

Collectively, my volunteer experiences have significantly enriched my professional journey, strengthened my communication and leadership capabilities, enhanced my financial management and interpersonal skills, expanded my professional network, and kept me informed about sector developments. Above all, volunteering has allowed me to meaningfully contribute to the growth and sustainability of the research administration profession, while advancing my own career and personal development. I encourage others to consider volunteering with our professional societies, whether by writing an article, joining a committee, or mentoring a colleague, as small contributions can strengthen the field and support our shared professional growth.

AI Statement

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FEDERAL PULSE HIGHLIGHT

Reading Agency Behavior

How to Detect Policy Change Before It's Announced

By Anna Quider, PhD

The *Federal Pulse* is a regular update created to help the SRAI research management and administration (RMA) community stay informed about the rapidly evolving federal landscape.

The following update was originally shared with subscribers in the March 2026 edition of the newsletter.

Many consequential federal policy shifts do not begin with a press release. They begin with behavioral changes that are blinking red lights that indicate forthcoming broader agency action. For research managers and administrators, learning to read these signals can provide a strategic advantage and help protect your organization. Here are several changes to be on the lookout for.

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Government Relations Liaison

1. Changes in NOFO Language

Subtle edits in Notices of Funding Opportunity often precede broader policy shifts. Watch for expanded disclosure language, greater emphasis on mission alignment, increased references to workforce development or national security, and new data-sharing or cybersecurity requirements. There are signals right now that federal research agencies are moving toward reducing the number of targeted solicitations they release and instead are adopting a model that looks more like the Department of Defense's "Broad Agency Announcement" style of solicitation.

2. Tightening Award Terms and Conditions

Agencies may adjust award terms before formal rulemaking occurs. Indicators include lower prior approval thresholds, expanded reporting obligations, additional certifications, or enhanced scrutiny of foreign collaborations.

3. Slower Obligations and Review Delays

Operational timing is often an early indicator of policy adjustment. Consolidation of awards, delayed paylines, or extended review cycles may reflect internal capacity constraints or portfolio realignment. Under the Trump Administration, the White House has strongly centralized decision-making regarding federal spending and prioritization, even for the agencies that typically rely heavily on independent merit review for funding decisions. If a federal agency is instructed by the White House to delay spending or realign spending to reflect White House priorities, the agency program officers you are working with are likely not read in on the details such as why these changes are taking place and how long they will persist, nor do they have the authority to supersede these changes.

4. Staffing and Organizational Signals

Federal science agencies shed more jobs in the past year than they did over the last two decades, according to a recent article by FYI Science Policy News (Zhang, 2026). Reductions in staffing, elimination of rotator positions, or expanded authority for centralized management offices can materially affect agency behavior and program execution. The dramatic reduction in staffing is having a significant, deleterious impact on the administration of federal sponsored awards. Relatedly, several agencies are undergoing restructuring which they say, in part, is motivated by reduced staffing. Watch for which programs are eliminated, consolidated, or elevated during a reorganization.

5. Strategic Framing and Public Messaging

Agency speeches, advisory committee minutes, the release of requests for information, and congressional testimony often telegraph directional change before funding levels, policies, or management shift. Spending a few minutes scanning a free science policy news aggregator such as the FYI Science Policy News This Week[1] newsletter or the Van Scoyoc Washington's Week in Science[2] newsletter can help you stay on top of agency and Administration signaling in real time.

Reading agency behavior can feel daunting but it is an important horizon-scanning function to position and protect organizations that participate in federally sponsored programs. Organizations that cultivate this literacy are better positioned to advise their leadership, align proposals strategically, and prepare compliance systems proactively.

References

Zhang, C. (2026, February 26). *Federal Science Workforce Declines Sharply Under Trump*. AIP. https://www.aip.org/fyi/federal-science-workforce-declines-sharply-under-trump

[1] https://www.aip.org/fyi/this-week-archive

[2] https://www.vsadc.com/news/type/weekinscience

GRANT MANAGEMENT & FINANCIAL OVERSIGHT

Choosing How to Travel

By Alyssia Schwenke

You've been approved to travel—now comes the fun part: figuring out how to get there. Transportation costs are among the most scrutinized parts of sponsored travel, so let's unpack planes, trains, and automobiles before your grant takes an unexpected detour.

Federal regulations don't dictate how you should travel, but your institution probably does. Rather than using a strict "drive vs. fly by X miles" rule, my institution applies a cost-comparison approach, which allows flexibility while still emphasizing fiscal responsibility. When comparing travel options, be sure you're capturing the full picture:

- Flights should include airfare, baggage fees, ground transportation, and airport parking.
- Driving should include mileage, tolls, and parking fees.

Think of cost comparisons as your financial remix same trip, different versions, and you've got to pick the one that won't land your grant in the "explicit lyrics" section of an audit.

The goal isn't to force the cheapest option every time—it's to document that the method selected is reasonable and cost-effective.

A Real Example

I once had a group of five traveling from Blacksburg, VA to Washington, D.C. Everyone wanted to drive separately for personal convenience. While a four-hour drive made sense on the surface, once we added downtown parking for five cars, the trip would have cost an additional $500.

By comparison, the group could either carpool or take Amtrak for around $100 per person round-trip.

One of my favorite quotes from our Controller's Office is:

"We don't pay for convenience."

Using that philosophy, the reimbursable option was the train (not five separate cars).

Picking the "Right" Flight

The cheapest flight might add hours to your travel day. The fastest flight might double the cost. And here's the part people forget: your time has value too.

A good test to apply is this:

Would a reasonable person spend their own money on this option, given the price difference and time impact?

If your answer is "No—that's absurd," it likely won't hold up in an audit either—because compliance rules don't care whether your trip is "fly like a G6."

While this approach isn't written into policy, my personal rule of thumb is:

1. Sort by lowest price to understand the baseline.
2. Then sort by shortest duration to see what "efficient" looks like.
3. Book something in the middle that balances time and cost appropriately.

And while you're at it, take a screenshot of your cost comparison when you book. You're already there. A few extra seconds now can save a lot of explanation later.

First Class Dreams and Business Class Reality

Thinking about first class? Don't get your hopes up.

Business class may be allowable on some international flights, particularly transatlantic—but only if your sponsor allows it. Some explicitly prohibit it, so always check the award terms and keep your documentation handy.

Mixing Business and Personal Travel

Bringing a spouse? Adding vacation days? Traveling with your whole crew? That's perfectly fine, but it changes what's reimbursable.

When mixing personal and business travel, you must be able to show:

- What the flight would have cost for business-only dates
- What the rental car would have been for a base model sedan
- Which hotel costs were tied to personal guests

If you upgrade to a minivan, book a suite, or extend the stay—those extra costs are yours. Documenting the "what if" price protects both you and the award.

In the end, transportation decisions don't have to be complicated, but they do have to be defensible. A little planning, documentation, and good judgment at the booking stage can prevent major headaches later and help ensure your travel costs land safely where they belong.

AI Statement

I have used Artificial Intelligence to assist with writing and editing the submitted manuscript. Specifically, I used OpenAI's ChatGPT to help refine the tone, clarify language, and condense content for readability and word count limitations. The content and ideas are entirely my own, and the AI was used as a writing assistant to improve clarity and flow.

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COMMUNITY & MEMBER ENGAGEMENT

Late Career Transitions: The Art of Embracing New Possibilities

By Debra Schaller-Demers, MSOM

Is it ever too late to contemplate a career transition? Based on my experience, I would say the answer is "no." Job satisfaction and personal fulfillment are sometimes hard to align, but no one should spend time unhappy at work. Knowing when to go is crucial not only for job satisfaction but for personal growth as well. In this article, I describe my professional journey and evolution, including a surprising late career change that allows me to grow in new and unexpected ways.

In today's world, job satisfaction and personal fulfillment are sometimes hard to align. For the past 23 years, I have been telling everyone I know how much I value being a Research Administrator (RA) — a career I could not have imagined for myself back when I was a Fine Arts major as an undergrad. I have always believed that no one should stay in a job that makes them unhappy. As my dear colleague Mark Hochman always says, knowing when it's time to move on is crucial not only for professional happiness, but for personal growth as well.

Even at nearly 70 years old, I am still active in my field. When people hear my age, their eyes widen and the next question often is: "When are you going to retire?" Admittedly, I am a bit more tired these days, but I am not quite ready to step away just yet. Let me share a bit of perspective.

> Sometimes we choose to leave a job, and sometimes the choice is made for us. Whatever the reason, it's up to each one of us to embrace the change and the opportunity to learn and grow in a new direction.

In June 2002, after ten years, my tenure as a Conflict Resolution specialist in NYC public schools came to an end when the program was discontinued. I was devastated. I loved the work and found it deeply meaningful; I had spent over a decade teaching parents across the city how to communicate effectively and resolve problems without resorting to violence.

I was desperate for a job and found an opening on idealist.org. To this day, I don't know why I applied or why they hired me —I had zero research experience —but they clearly recognized a skill set in me that aligned with the role. And that's how I began my journey as a Research Administrator in September 2002, starting as a Research Education Coordinator at Weill Cornel Medical College (WCMC).

By the time I left WCMC five and a half years later, I had become the Research Integrity/Conflicts of Interest Manager. I moved on to Memorial Sloan Kettering Cancer Center (MSK) as the Research Education and Communications Manager. Within six months, I was named Director of Research Outreach and Compliance (ROC) and over the next 15 years, my responsibilities grew annually. After nine years, I was promoted to Senior Director, ROC, and four years after that, just when I thought I had finally reached the pinnacle of my professional career, I was promoted to Vice President, ROC. I was convinced then that when the time came, I would happily retire from MSK.

Fate had different ideas.

When COVID-19 hit in March 2020, it changed all of our lives. Priorities shifted, and the way we worked and interacted with each other changed — in some ways for the better, and in other ways… not so much. During that time, my boss of 14 years, the one who hired, mentored, and promoted me, retired with only three weeks' notice. My staff and I were sent to a different office under new leadership. Looking back, it certainly wasn't an easy time for any of us. By November 2022, the organization announced "massive" layoffs for the coming year. Sure enough, on January 17, 2023, I was one of 400 people whose jobs were eliminated.

The unthinkable had happened, and I was now 67 years old. Again, people asked, "Why don't you just retire?" My answer was simple: I wasn't ready, emotionally or financially, and I still had more to give. Even though I did not know for sure that I would be let go, I sensed the unspoken shift and began to prepare. I updated my resume and saved my contact list. Then, a dear former colleague from MSK reached out, asking me to share a New York University (NYU) job opening with my network, and I saw a glimmer of my future. I lost my job on a Tuesday, and by Friday, I had an offer from NYU!

Since February 2023, I have served as the Senior Director of Research Integrity and Compliance. It's a significant role, overseeing Conflicts of Interest

for faculty and researchers, the Human Research Protection Program (HRPP), and the Responsible Conduct of Research (RCR) education program. I also serve as the Research Integrity Officer (RIO) and Institutional Official (IO) for the HRPP. While I no longer hold the coveted "VP" title, I have learned that while the bigger title looks great on a resume or a signature line, it's not what really counts in the end.

I recently came across a great quote from Daniel Goleman on LinkedIn: "Your title doesn't make you a leader; your actions, standards, and integrity do." I have found this to be profoundly true. Sometimes we choose to leave a job, and sometimes the choice is made for us. Whatever the reason, it's up to each one of us to embrace the change and the opportunity to learn and grow in a new direction. Attitude is everything. As Research Administrators, despite the current political chaos and relentless attacks on science and higher education, we remain the ones who support and protect the integrity of scientific knowledge and discovery.

So, knowing when it's time to go, whether towards a new opportunity or to the bliss of retirement, that's up to you. Just make sure you take control and make each day count. May this year be our best year yet!

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OPERATIONS & WORKFLOW MANAGEMENT

Choosing the Right Channel: Usage Guidelines for Communication Platforms in Research Offices

By Zahrie Ernst

As Research Administrators, we may communicate across multiple platforms and in a myriad of ways. How do we know where, when, and how to communicate with whom? And how do these diverse platforms impact the overall clarity and effectiveness of our messages?

The world we live in today is inundated with numerous communication platforms and methods. Prior to 2010, most professional communication occurred sluggishly via phone, email, and later, text. When the COVID-19 pandemic abruptly moved corporate offices into remote settings, we were forced to adapt to new styles and methods of communication. Platforms like

Slack, Teams, and Google Workspace, which were optional before, became essential for offices and teams. And while each platform provides a suite of helpful features, the appropriate use of these for office communication is not yet standardized.

As research administrators, we communicate across multiple platforms and in a myriad of ways. This lack of standardization can introduce unnecessary chaos in our day-to-day work. How do we know where, when, and how to communicate with whom? How do these platforms influence the clarity of our messages?

To navigate these varied options, I review below common communication platforms and how they can be used effectively.

Instant Messaging Platforms: Slack, Google Chat, etc.

Instant messaging platforms are great for informal communications that revolve around a short answer, question, reminder, or announcement. In fact, some of these platforms have channels that allow users to categorize information (e.g., projects, informal hobby chat, regular programmatic updates, team announcements). This can help keep information structured and eliminate the need for decisions about how information should be shared. Decision fatigue is a real and rampant issue in workplaces where systems are not organized well. Identifying platforms for specific purposes can help mitigate this by reducing the number of decisions made daily.

> ***Best practice tip:*** Private health information or other confidential data should never be shared on an informal communication channel such as an instant messenger.

Virtual Meeting Platforms: Zoom, Teams

When an instant message will not suffice, virtual meeting platforms offer a way to communicate in real time, conveying appropriate tone and nuance. These platforms are great for instant audio or video communication, whether informal, semi-formal, or formal. The immediacy and accessibility of these platforms have reduced the need for in-person check-ins, establishing them as the default for meetings in 2025. Additionally, with tools for AI transcription and note-taking becoming even more widespread, we now have the ability to avoid potential distractions posed by multitasking and be more present during these conversations.

> ***Best practice tip:*** Add meeting title and provide an agenda when delivering updates on research administration workflows, especially during periods of frequent change.

Formal Channels: Email, Memos or Other Written Communication

For official policies, formal announcements, or sensitive topics, written communication is essential. This helps document formal practices, preserve confidentiality, and facilitate record keeping for archival purposes. To communicate urgency, use communication best practices that you know will get your colleagues' attention most effectively, like typing "Urgent" in the Subject line of your email or checking off the "High Importance" box on your message.

Understanding your organization's culture and responsiveness to emails versus other platforms can help you determine what should be communicated via an email versus another communication channel. Emails and other written memos should always be considered the "book of record" for communications.

> ***Best practice tip:*** If email is used for both informal and formal communication, try setting up general email inboxes like "Announcements@institution.org" so your colleagues can easily search for announcements or other important information disseminated within and through your department.

The Value of the In-Person Meeting

Despite advances in digital communication, face-to-face meetings still hold unique value in many situations. Given how the world has changed, we may forget that in person meetings are an option—and may even be preferred, depending on the topic you want to discuss or the tone you want to convey. At the same time, we must remember that humans are wired for connection, and expressing our humanity in the workplace is good for the person reaching out and the people joining in. If you need to discuss a topic that may be challenging, involves problem solving, or requires cross-departmental coordination, in person meetings may ultimately prove to be more beneficial, even if they are met with initial resistance.

Closing Thoughts

Standardized communication protocols can help create consistency, making collaboration cross- departmental collaboration. Having clearly established norms can help teams minimize confusion, reduce decision fatigue, and maintain alignment throughout grant and contract workflows. Standardized communication policies in your office ensures that everyone understands the appropriate tool and the urgency associated with each mode. It is advisable to limit the number of platforms where feasible and clearly define when to use what for informal versus formal communication. Last, but not least, leading by example can help reduce resistance to a platform and showcase its value for your team.

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CAREER GROWTH & LEADERSHIP

Unlocking Hidden Value: Why Research Administration and Compliance Professionals Should Consider the PMP

By Lyudmila Babaev, CIP

Everyday tasks in research administration and compliance are really project management in action. This is why pursuing the PMP® credential can be worthwhile. Discover why and for whom it could be worth the investment.

If you work in research administration or compliance, chances are you have managed more projects than you realize. Whether you have led an audit process, updated SOP's, coordinated grant or contract workflows, overseen quality assurance activities or organized educational outreach for researchers, you're not just supporting compliance and operations; You are managing projects!

Yet many of us in research administration and compliance roles don't think of ourselves as project managers. That title tends to conjure up images of construction sites or software teams. In reality, project management is everywhere, and in research administration and compliance, it's foundational.

This realization changed how I viewed my own work and ultimately led me to pursue the **Project Management Professional (PMP®)** certification—a globally recognized credential from the **Project Management Institute (PMI)**. I wanted to formalize the skills I had already been using and learn new ways to approach the complex initiatives we encounter across the research enterprise.

From Compliance to Coordination

At its core, project management is the application of knowledge, tools, and techniques to meet a goal within scope, time, and budget. That definition fits a wide range of activities we undertake in IRB offices and research administration every day.

Some examples of "hidden" project management in research administration and compliance roles include:

- **Developing new SOP frameworks**: planning, stakeholder analysis, process mapping
- **Creating tools or checklists for investigators:** risk management, quality control
- **Training new staff on policies and systems:** resource planning, knowledge transfer
- **Leading a compliance audit or internal review:** monitoring, metrics, closure

All of these require the same core competencies: communication, scheduling, stakeholder engagement, and the ability to manage competing priorities, all of which are emphasized in formal project management training.

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- A structured framework for managing initiatives
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How to Get PMP Certified

To sit for the PMP exam, you'll need:

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- A high school diploma/associate's degree with at least 60 months of project management experience
- 35 hours of project management education (available through PMI, university-based programs, and/or prep providers)
- Completion of the PMP exam application and passing a 180-question test that covers three key areas: People, Process, and Business Environment

If you're not sure you meet the experience requirements, PMI also offers the C**ertified Associate in Project Management (CAPM®)**—a strong entry-level option. I recommend submitting the PMP exam

application first. It's free to apply, and the worst outcome is you will be told you don't yet qualify.

Benefits for Research Administration and Compliance Professionals

Some additional benefits include:

- **Career mobility:** Opens doors to leadership, quality improvement, or research operations roles
- **Professional growth:** Builds confidence when working across departments or leading institutional initiatives
- **Broader perspective:** Enhances your ability to frame research administration and compliance contributions in terms of institutional impact

Final Thoughts

If you've ever managed a process improvement, led a staff training, developed guidance materials, or implemented a new system—you've been practicing project management, whether you called it that or not. Recognizing this is powerful. It affirms the complexity of your work and opens the door to new opportunities.

The next time someone asks what you do, don't just say "I work in research administration" or "I work in research compliance." Try:

"I manage projects that improve the quality, efficiency and compliance of research."

Because chances are, that's exactly what you do.

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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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