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Strengthening Pre-Award Operations: Managing Capacity, Risk & Proposal Success



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Proposal Surges & Deadline Clustering

The Challenges

- Multiple sponsor deadlines in a short period
- Fiscal year-end proposal spikes
- Proposal “economic cycle” – peaks and troughs

- **Impact**
 - Staff operating in surge mode
 - Reduced time for thorough review
 - Increased risk of errors

- **Strategies**
 - Implement firm internal submission deadlines (ex: 5 business days)
 - Analyze historical deadline patterns
 - Forecast peak cycles **60–90 days in advance**
 - Develop surge staffing support plans

Late Proposal Changes

The Challenge

- Late budget preparation and revisions close to submission
- Last-minute scope changes
- Sponsor guidance updates near deadlines
- Fragmented communications across teams

Impact

- Exponential increase in review times
- Greater risk of inconsistencies and errors
- Bottlenecks for experienced staff
- Reduced proposal quality and competitiveness
- Increased institutional risk

Strategies

- Tiered review model based on submission timing
- Standardized templates and checklist
- Formal version control practices
- Change impact assessment step

Multi-Site & Subrecipient Coordination

The Challenge

- Delayed subrecipient documentation
- Budget and F&A rate inconsistencies
- International collaboration complexity

Impact

- Higher administrative burden
- Increased compliance risk
- Longer processing times per proposal

Strategies

- Centralized subaward intake review
- Standardized subrecipient email including templates
- Subrecipient document tracking tools
- Provide subsite with hard deadline prior to institutional deadline

Internal Routing & Institutional Approvals

The Challenge

- Late routing initiation
- Proposal errors and missing components
- Knowledge gaps in processes and policies
- Administrative bottlenecks

Impact

- Compressed institutional review times
- Increased risk of noncompliance or missed requirements
- Escalations that disrupt standard workflows

Strategies

- Establish and enforce internal "soft deadlines"
- Increase transparency with routing dashboards and status tracking
- Share compliance and timeline metrics with leadership

Sponsor Policy Complexity

The Challenge

- Sponsor proposal updates
- Data management plan requirements
- Disclosure requirements for collaborations

Impact

- Increased learning curve for investigators and administrators
- Higher risk of administrative withdrawal
- Added compliance workload

Strategies

- Sponsor-specific quick reference guides
- Centralized policy repository
- Quarterly updates for investigators and staff
- Compliance pre-checklists for high-risk sponsors

Staff Constraints

The Challenge

- Vacancies during peak proposal cycles
- Uneven workload distribution
- Misalignment between staffing levels and proposal volume
- Knowledge silos

Impact

- Staff burnout and increased turnover
- Loss of institutional knowledge
- Delayed response time
- Reduced operational resilience

Strategies

- Use proposals-per-FTE metrics to support staffing or portfolio realignment
- Implement a cross-training matrix to reduce knowledge gaps
- Centralize and standardize SOPs in a searchable repository



Responsible Use of AI in Pre-Award Operations

Appropriate Uses

- ✓ Drafting templates and boilerplate language
- ✓ Summarizing sponsor guidelines
- ✓ Creating internal checklists and training materials
- ✓ Drafting communications or documentation

Use With Caution

- ⚠ Budget modeling
- ⚠ Knowing your institution's AI policy
- ⚠ Compliance interpretation without verification

Avoid

- ✗ Uploading confidential proposal materials into public AI tools
- ✗ Using AI outputs without staff review
- ✗ Allowing AI to replace institutional compliance oversight

Key Principle

AI should **enhance staff efficiency while maintaining professional oversight.**



Conclusion: Building Stronger Pre-Award Operations

Key Takeaways

Strong pre-award operations help:

- Reduce submission risks
- Improve competitiveness for external funding
- Support investigator success
- Sustain administrative workforce capacity

Moving Forward

Institutions strengthen proposal success by shifting from: reactive preparation and deadline management to proactive operational planning and success!

Thank You!

