



SOCIETY OF
RESEARCH
ADMINISTRATORS
INTERNATIONAL

When the Ball Drops: Effective Communication Between RA & PI

Presenter Information

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Learning Objectives



Identify strategies for effective communication between RA's & PI's



Discuss practical applications for effective communication



Identify workflow processes to implement within your unit or organization



Share and learn new approaches to anticipate grant needs

Poll Question

How long have you worked in Research Administration?

- a) < 1 year
- b) 1 - 2 years
- c) 3 - 5 years
- d) 6 - 10 years
- e) 11+ years

Poll Question

How would you define your current role?

- a) Department/Unit
- b) Central Pre-Award
- c) Central Post-Award
- d) Central Pre- and Post-Award
- e) Higher Administration
- f) Other

Group Discussions: Scenarios

WORK ON



COMMUNICATION. THX.

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Scenario #1

A PI has a new grant that includes salaries. The RA knows salaries are budgeted but doesn't have any details. The PI assumes RA is reviewing the grant budget and processing paperwork for appointments/salaries. The RA waits for PI to provide &/or verify salary information. Several months later, the PI is certifying effort and tells the RA salaries are missing on the grant.

- Who dropped the ball?
- Could the RA in the scenario have anticipated and/or prevented the situation?
- What would you have done differently?
- What recovery strategies would you use in this situation?

Scenario #2

A PI wants to purchase an expensive piece of equipment. It's allowable on the grant and is a budgeted equipment expense. The RA knows it will take extra time to process the paperwork as it will involve other university units (e.g., central purchasing, buyer, CIO office, etc). The PI contacts the RA about purchasing the equipment with only 3 months left in the grant. The PI says they didn't need the equipment until the final phase of the project which is why they waited to place the order.

- What could you have done to proactively prepare for this purchase?
- In the context of your institution, what steps would you implement to prevent the situation from reoccurring?
- What would you coach a teammate to do in this situation?

Scenario #3

Your institution involves multiple steps & several people across different units to hire a graduate student researcher (GRA). The unit RA is not always responsible for processing the new hire paperwork, but does need to coordinate with these other units to ensure it is done. The PI has a habit of asking for things at the last minute.

- What sorts of preparation can you do to mitigate the effects of their delayed requests?
- In the context of your institution, how would you work with individuals in other units to proactively handle these situations?

Scenario #4

While reviewing the financial status report, a PI notices that their grant account is in significant overdraft with several months left in the project. The PI accuses the RA of charging expenses to the wrong grant.

- What steps do you take to unravel this mystery?
- Could the RA in the scenario have anticipated and/or prevented the situation?
- What recovery strategies would you use in this situation?
- What would you coach a teammate to do in this situation?



ONE DOES NOT SIMPLY

REPLY THAT'S NOT MY JOB

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The Importance of Effective Communication

- Grants are complicated
- Compliance
- Manage stressful situations
- Mitigate risk of conflicts and disputes
- Credibility

But what IS **effective** communication?

How to Effectively Communicate With Your PI

- Find a way to say “yes” – avoid leading with “no”
- Establish mutual respect – builds trust in the relationship
- Choose the right format – match information type
- “The medium is the message”
- Ask clarifying questions – understand the PI’s needs & concerns
 - Context is king – are they asking the right question?
- Be clear and concise
 - Stick to the point; don’t use 10 words when 5 will do
 - Avoid jargon & acronyms; idioms & colloquialisms

Effective Communication: Strategies for Success

- **Clearly define roles & responsibilities**
 - Training for new PI's and continued education for all PI's
 - Communication between central and department staff
 - Create a roles & responsibilities matrix

- **Agree on a schedule to meet regularly**
 - Respect their time & prioritize topics
 - Build the relationship - ask the PI about their research

Effective Communication: Strategies for Success

- Research solutions and feedback before responding to questions
 - If you need time, let the PI know that you'll get back to them - then actually respond
 - Act as a translator for your faculty – context is king

- Be intentional!

Communication Breakdown: Recovery Strategies

- Recognize when current communication isn't working
- If communication has become tense or terse, take a break
- Email vs. In-Person/Virtual Communication
- Get a second opinion
- Practice empathy
- Leave an email response in “draft” and re-read once calm
- What recovery strategies have you used?

Ultimately,
effective communication is
anything that works!



EFFORT

IT'S USUALLY NOT HARD TO TELL IF IT'S BEEN USED.

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