

# Partners in Pre-Award: Teaching Federal Expectations Without Adding Work

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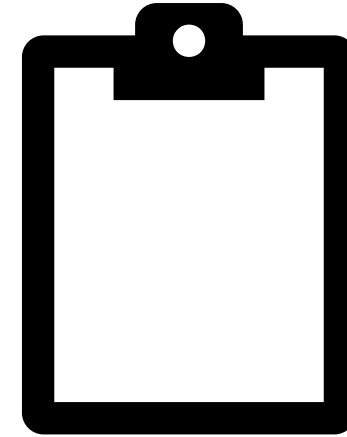
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# Disclaimer and Reminders

All views expressed are based on personal experiences and opinions; they do not represent the federal government, QEM Network, or anyone other than ourselves



Slides and resources will be available



Please complete the post-workshop survey

# Workshop Overview

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- Welcome and Framing
- Strategic Approach: Focusing on What Researchers Need to Know
- Ways to Teach Without Adding Work
- Practical Examples and Case Studies
- Implementation Roadmap
- Reflection and Q&A





# Insert Mentimeter-Audience Poll

1. What is your current role?
2. How long as you been in your current role/how would you describe your pre-award experience level?
3. What's your biggest pre-award pain point?
4. What is your institution's AI-use policy?





# Framing the Issue

To understand the challenge

# Using a Tier Framework

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- Tier 1 – Novice
- Tier 2 – Intermediate
- Tier 3 – Seasoned/Experienced





# Common Barriers

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Limited staff time



Faculty resistance to training



One-size-fits-all compliance messaging



For Tier 1, lack of institutional knowledge



For Tier 1, lack of existing protocols and policies





# Risks of not addressing

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- Proposal delays
- Compliance errors
- Increased back-and-forth during submission
- Institutional risk from burnout, late/missed submissions





# Strategic Approach

## What researchers need to know



# Researchers don't need to become compliance experts

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- They need to understand just enough to:
  - Make good decisions early
  - Avoid preventable errors
- The biggest problem we see:
  - We often communicate in *policy language*
  - But researchers need *practical meaning*

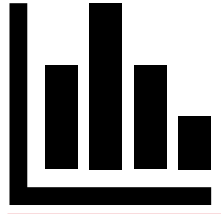


# Researchers don't need to become compliance experts

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- Faculty are not motivated by compliance, they're motivated by:
  - Getting funded
  - Avoiding delays
  - Protecting their research





# Insert Mentimeter-Audience Poll

What are the biggest issues you face with faculty at the pre-award stage?



# Using Faculty-centered Framing

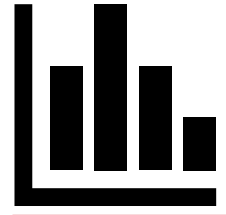
- From “requirement” to “how it benefits your proposal”
- **Examples:**
  - Instead of: “You must include a data management plan”
    - Try: “Without this, your proposal may not be reviewed”
  - Instead of: “Costs must be allowable under federal regulations...”
    - Try: “If we include this cost, it may be removed later or delay your award.”
-  AI Tip: Can use AI to summarize detailed budget rules and provide language that’s faculty-centered



# Ways to Teach Without Adding Work

Embedding education into existing workflows





# Insert Mentimeter-Audience Poll

What is your current pre-award workflow?



# Example Workflows

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# Teaching Tool: Microlearning

- Short, targeted, contextual guidance
- **Examples:**
  - 2-3 sentence tips in emails, e.g., “Including this now can prevent delays at award stage.”
  - Inline guidance in budget templates, e.g., “Administrative salaries are typically unallowable unless specifically justified.”



# Teaching Tool: Just-in-Time Teaching

- Deliver information shortly before it becomes relevant and in anticipation of deliverables
- Examples:
  - Triggered guidance when certain sponsors are selected
  - Checklist-based nudges before routing
  - When a PI selects a federal sponsor:
    - Trigger a short guidance note
  - Before routing:
    - Checklist with key compliance reminders





# Teaching Tool: Standardization

- Use consistent templates, language, and reduce the need for repeated explanations
- Rule of thumb: if you're explaining it more than twice during the process, it should probably be templated
- Examples:
  - Budget justifications
  - Email responses
  - Intake questions
- 💡 AI Tip: can be used to standardize language across different documents. It can also provide discipline-specific compliance issues and examples to use in microlearning and just-in-time teaching.



# Examples and Case Studies





# Budget Template Enhancements

- [https://apply07.grants.gov/apply/forms/sample/RR\\_FedNonFed\\_SubawardBudget30\\_2\\_0-V2.0.pdf](https://apply07.grants.gov/apply/forms/sample/RR_FedNonFed_SubawardBudget30_2_0-V2.0.pdf)
- [https://apply07.grants.gov/apply/forms/sample/RR\\_FedNonFedBudget\\_2\\_0-V2.0.pdf](https://apply07.grants.gov/apply/forms/sample/RR_FedNonFedBudget_2_0-V2.0.pdf)





# Proposal Intake Forms

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- <https://forms.office.com/pages/responsepage.aspx?id=a3HDOXFk1U-sBKfbqjJ4K63CWwZKGVtGqXcKOUyCxt1URURLOUtWNTILMVE0SFMyR1IyUVdKSE81Ni4u&route=shorturl>
-  AI pro-tip: built-in prompts that guide correct inputs



# Case Studies

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- AI tip: Use AI to generate or adapt case studies to specific funding notices or departments/disciplines. It can also help generate templates and forms.





# Implementation Roadmap

Start small, scale intentionally





# Steps

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Step 1: Identify high-friction points

Step 2: Choose an approach

Step 3: Test with one department

Step 4: Iterate based on feedback

Step 5: Scale across institution





# Your Turn!

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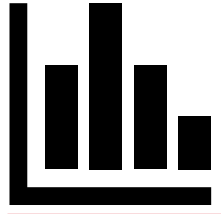
- Identify one existing touchpoint with researchers or issue with your current workflow that you'd like to improve
- Brainstorm how to embed a teaching tool there or streamline your institution's process





# Reflection and Q&A





# Insert Mentimeter-Audience Poll

1. What's working/going well at your institution?
2. What challenges are you facing?
3. What obstacles might you/your team face?
4. What resources are available to you to aid in proposal submission?

# Thank You for Your Time and Attention



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QEM Events Page



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Workshop Feedback Form

