



# ORI is Your Partner

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# How We Can Better Help One Another

Office of Research and Innovation (ORI) Program Administrators (PAs) partner with Principal Investigators (PIs) and Department Research Administrators (RAs) to collaborate on many tasks.

Our goal today is to share ideas on how PAs, PIs and RAs can better work together to manage our collaborative tasks and expedite necessary processes.



## Our Collaborative Tasks

- Approving COEUS Records
- Submitting proposals in external portals (federal, state, non-profit)
- Overseeing the execution and negotiation of sponsored program agreements (incoming and outgoing), including subawards



# Grants Team Roles

- Review COEUS records to ensure they comply with Drexel and sponsor policy
- Review research proposals prior to submission to ensure they comply with sponsor policy
- Oversee the negotiation and acceptance of awards and related research documents in support of sponsored projects
- Prepare, negotiate, and issue sponsored research agreements (including subawards)



## Department Roles

- Build COEUS records to ensure they comply with Drexel policy
- Build research proposals in the relevant portal prior to review/submission to ensure they comply with sponsor policy
- Provide necessary documents related to the negotiation and acceptance of awards and related research activities in support of sponsored projects (including subawards)



# How Departments can Assist

- Documents requiring ORI signature completed as much as possible before sending to the PA for signature.
  - Institutional information: <https://drexel.edu/research/proposal/prepare/organization-info/>
  - Audit information: <https://drexel.edu/comptroller/financial-reporting/audited-financial-statements/>
  - Subrecipient Commitment form: <https://drexel.edu/research/proposal/prepare/proposal-processing/>
  - F&A rate agreement: <https://drexel.edu/comptroller/research-accounting/financial/indirect-cost-rates-Drexel/indirect-rate-agreements/>

Some examples:

- SF 424 is completed by the department before sending to the PA for review and signature
- Letter of Intent, is written and signed
- Subrecipient Commitment forms filled out



## Who can sign?

Maria T Schultheis, PhD , Vice Provost of Research is authorized to sign all agreements that are processed by ORI.

Gia Boersema, Assistant Director, Grants, is the Signing Official for Certifications, Face Pages and Subrecipient Commitment Forms.

PI, Department Heads, Department Administrators sign Advance Account Request Forms.

Aleister Saunders, PhD, Executive Vice Provost of Research is the Authorized signer for Federal proposals.

***Please send any document that needs to be signed to your PA first, they will forward to the appropriate parties to obtain signature***



# Documents ORI Grants Team Prepares

- Federal Prime (FDP) - Subaward to Drexel – SUBD - The department creates COEUS record, PA receives document from sponsoring institution and oversees execution.
- Federal Prime (FDP) - Drexel subaward issued to subrecipient institution – DSUB - The department uploads SCF, SOW and Budget in COEUS, PA drafts subaward upon award receipt.





# Grants Vs. Contracts Division of Labor

- Grant team handles:
  - FDP subawards - incoming and outgoing subawards
  - Amendment/Modifications with changes to money or time (Non FDP and FDP)
  - Interpersonal agreements
  - Federal NOA that need signatures

Contracts teams handles all the other types of the sponsored research agreements. Includes Clinical Trail Agreements (CTAs), and Sponsored Research Agreements (SRA) and Memorandum of Understanding (MOU)



# Hand off to Contracts Team

- Department sends PA the agreement, PA will do a Handoff to Contracts team (or it can be uploaded in the COEUS and PA can retrieve it)
- A COEUS record must be routed if it has funding attached  
***Grants team will not do a hand off to contracts team without a COUES.***
- Non Funded agreements (CDA,MOU) can be sent directly to [Researchcontracts@drexel.edu](mailto:Researchcontracts@drexel.edu)
- Advance accounts can be established while incoming contracts are negotiated if <https://drexel.edu/comptroller/research-accounting/setup/>
- Department has an intent to fund document with a start /end date and dollar amount
  - Fully Routed COUES
  - Completed Advance Account form.



# Grants team Post Award Functions

Most Subaward Modifications-are handled by Grants team

- Both NON FDP and FDP.

No - Cost Extensions

- Federal are submitted via RAS
- Nonfederal depends on sponsors, but usually department submit or RAS

Sponsor Specific functions:

- NIH: RPPR, JIT , PRAMS and FRPPR are handled by grants team. Please route to or notify your PA when they are ready for submission.
- NSF: PI Changes are submitted by Pre Award.

**\*Pro tip: please send any modifications or amendments you receive to your PA - We don't always get modifications/notices from sources.**



# Checking on the Status of Documents

- Send email to your PA, please provide the PI Name, Sponsor, COEUS number and fund number(if applicable) with your request. Each PA has over 100 PI's we work with so its helpful to have that information.

## **Coeus-Lite Negotiations List**

- You can see the status of a negation in COEUS Lite. If you login, and the click on the “My Negotiations Tab”, you will see a list of negotiations for your department.
- You can click on the negotiation to see where it is in the process .



# Communication and Timing

- Involve us Early and Often
- Your first Point of Contact in ORI should be your Grants Team PA.  
<https://drexel.edu/research/about/find-program-administrator/>
- If your PA is Out-of-Office, please contact their designated back-up
- Please do not use DUREsearch email to communicate with your PA
- We aim to respond to requests within 24-hours.
- The type of agreement will determine the turnaround time required to produce a fully executed document.



## Additional Resources

Please visit [drexel.edu/research](https://drexel.edu/research) for the following resources:

- Training and Tutorials on COEUS
- A list of PAs by School/Department
- Links to the Advance Account Form
- FAQs

Always feel free to contact your ORI PA with any questions or for additional information: <http://drexel.edu/research/about/pa/>



## Questions?

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