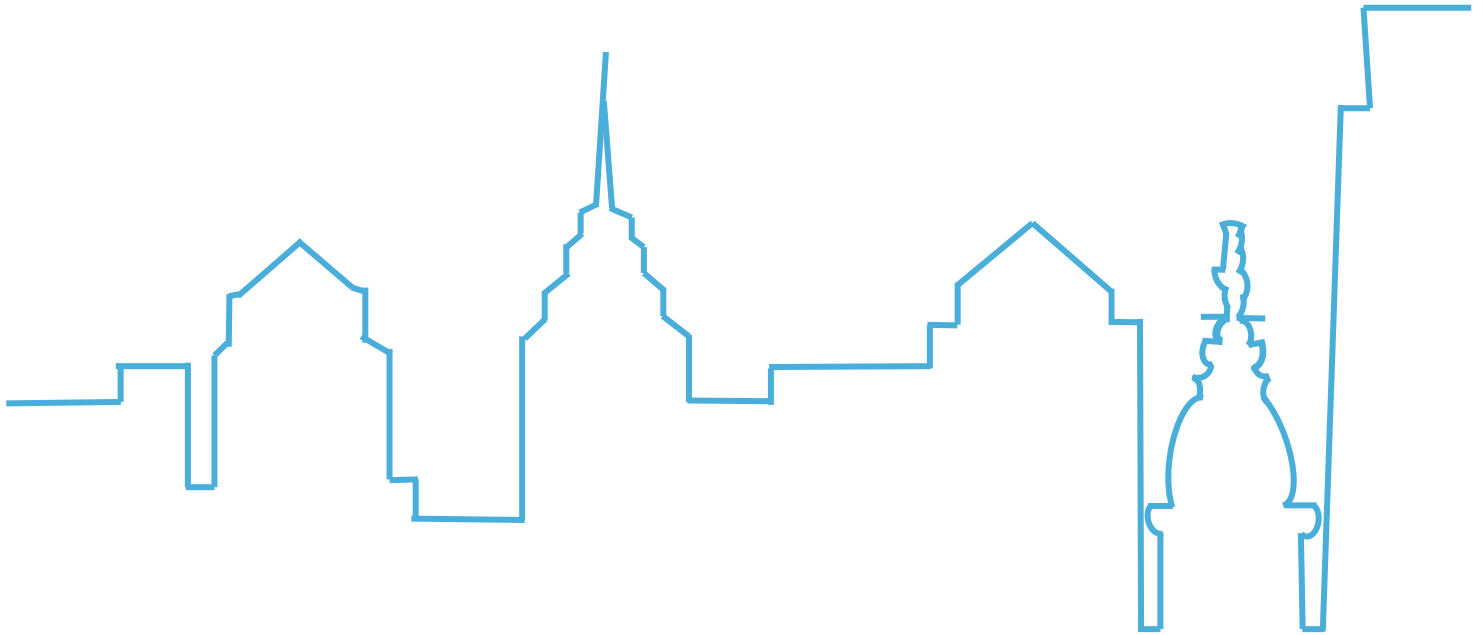




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The Office of Applied Research Faculty Playbook Fall 2021



About this Playbook

This playbook is meant as a guide to lead researchers at Jefferson University through the administrative processes of on-campus research. This playbook outlines necessary steps and services available to make a wide variety of projects ranging from a weekend sprint project to a year of deep study possible here at Jefferson.

This playbook has been divided into the four stages of the project lifecycle: initiation, planning, execution, and close out. Please consult the Office of Applied Research at AppliedResearchOffice@jefferson.edu for immediate questions or concerns. You may also access additional information in our MyJeffHub community, Applied Research, [here](#).

Thank you to Caitlin Hagan who spearheaded this initiative to create the Applied Research Playbook.

Document Format Key

Black underline = jump to section in document

Blue underline = jump to specific website links



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Office of Applied Research

Opposed to the sole creation of new knowledge or expanding current knowledge, applied research addresses real-world and client-driven problems through the application of accumulated theory, knowledge, methods and techniques.

The Office of Applied Research at Jefferson is dedicated to fostering hands-on educational experiences to students while simultaneously providing cutting edge resources to industry and administrative support to both student and faculty researchers.

The Office of Applied Research, in collaboration with other university departments, provides support for coordinated efforts to assist in the proper design, planning, execution, and close out of sponsored research and industry projects on campus.

Meet the Office:

Associate Provost for Applied Research: Dr. Ronald Kander

Ron.Kander@jefferson.edu

Applied Research Operations Manager: Andrea Echeverri Amaya

Andrea.Echeverri@jefferson.edu

Administrative Assistant to Office of Applied Research: Melayna Frye

Melayna.Frye@jefferson.edu





Internal Research Support Services

The Office of Research Support Services (ORSS)

ORSS supports researchers with the submission process of grant proposals and the management of grants at Jefferson through [Research Administration Center of Excellence \(RACE\)](#) and [Office of Research Administration \(ORA\)](#). RACE and ORA follow Standard Operating Procedures and Service Level agreements for grant submission and administration.

RACE is responsible for assisting researchers with funding acquisition, proposal preparation, and budget development. As part of the center, the grants administrator and ORA Contracts Administrator assists in the specific execution of grant initiation and use as well as key sponsor negotiations.

The grant administrator is responsible for budget and all administration components of the contract. It is important to note that during the proposal and contract construction phase of the project no **Principal Investigator** should discuss fiscal responsibility with the sponsor. Contractual and fiscal obligations and negotiations will be made on behalf of the university by ORSS. More information regarding the ORSS can be found [here](#).

For additional questions, please contact the you RACE or ORA Contract Administration Team. If you do not know your representatives, please click [here](#).

Faculty in Kanbar College and the College of Life Sciences Should Contact:

Mike Jones, Associate Director of East Falls RACE team
Michael.Jones@jefferson.edu





The Office of Research Support Services (ORSS) (continued)

Faculty in the College of Architecture & the Built Environment, the College of Humanities & Science, the College of Rehabilitation Sciences, the College of Health Professions, and the School of Continuing & Professional Studies Should Contact:

Mike Jones, Associate Director of East Falls RACE team

Michael.Jones@jefferson.edu

Faculty in the counseling and behavioral health department should contact:

Diane Glynn, Grant Administrator

Diane.Glynn@jefferson.edu

For industry sponsor contracts all East Falls faculty should contact:

Susan Kravitz, Research Admin.

Susan.Kravitz@jefferson.edu

For ORA Pre-Award questions all East Falls faculty should contact:

Jeanmarie Johnston, ORA Pre-Award Contact

Jeanmarie.johnston@jefferson.edu

All Center City Faculty Should Contact their Grant Administrator





Academic Commons:

[Academic Commons](#) includes the Libraries Office for Professional Writing, Publishing & Communication, and other services

East Falls: AskGutman@jefferson.edu

Center City: AskALibrarian@jefferson.edu

Jefferson's Office of Institutional Advancement Corporate and Foundations Relations (CFR)

Jefferson's CFR team offers services for Jefferson faculty to seek and identify external funding from non-federal sources including, corporations with philanthropic intent, charitable foundations and associations. CFR also supports the development of letters of intent (LOIs) and proposals.

All East Falls Faculty Should Contact:

Laura Mateer, Associate Director of Development

laura.mateer@jefferson.edu

External Research Support Services Hanover

Hanover provides research development, grant writing, and strategic advising support to faculty at a wide range of colleges and universities. Their professionals deliver customized proposal review, revision, and production support, while also helping to align strategic priorities to funding trends and opportunities at all levels. Hanover's services are designed to help faculty secure funding, with support across the lifecycle of the grant-seeking process. Hanover services are as followed:





Hanover (continued)

Pre-Proposal Support: Funding prospect research, concept development, partner research and recommendations, outreach consulting

Proposal Development: LOI development, foundation, federal, state proposal production, program and research design consulting, unfunded proposal rewriting and resubmission, proposal production management

Proposal Review: Pre-review consultation, proposal narrative review for alignment, detailed proposal review and delivery memo, opportunity to debrief recommendations

Proposal Revision: Includes all aspects of the Proposal Review + tracked changes for suggested revision to improve clarity and presentation

If interested in learning more about Hanover and/or submitting a 'Project Request Form' to utilize Hanover's services, please contact andrea.echeverri@jefferson.edu. Please let your RACE representative know if the proposal you are writing was identified using a Hanover prospecting report.

Initiation

During the initiation stage of project development, the eligibility, feasibility, relevance, and collaboration around a topic should all be considered when designing the project and building a team. It is important to define project goals, deliverables, resources needed, and identifying a budget. [Click here](#) for the Research Checklist. This checklist should be utilized for all research projects.





Personal Eligibility

At the onset of project ideation, whether pursuing an individual topic of interest or presented an opportunity by a sponsor with a proposed scholarly or industry-connected project, faculty must ensure that they are personally eligible to contribute to a project prior to starting any work.

To ensure compliance of federal and state regulations as well as university compliance mandates, faculty are expected to adhere to their employment contract to determine their personal eligibility in a project.

Faculty members must receive approval from their Dean for course exemption or release time documentation before taking on an extra workload of a research project. Please click [here](#) for pre-award the course release document. If a project is embedded in a course, please refer to the **project embedded in course** section.

No Jefferson faculty can be reimbursed beyond their contractual agreement for work performed on sponsored projects, therefore; faculty must determine the effort they are contributing to each research project. No faculty can claim above one hundred percent effort at any given time.

Faculty must be aware of the time of year of each project execution as percent effort calculations can change from academic year to summer semesters.

During the execution of the project, effort report certification forms will be required. Please click [here](#) for accessing Peoplesoft HR effort reporting. Compensation for summer employment is determined on an individual basis depending on each faculty member's institutional base salary.

For more information consult the [ORA Pre-Award Manual](#).





Personal Eligibility (continued)

Questions regarding faculty workload may also be addressed to your college's Manager of Academics Operations (East Falls Faculty) or your college's fiscal officer (Center City Faculty).

Additionally, faculty and staff may find pertinent employment information on [MyHR](#).

Contact Human Resources or your Human Resources Business Partner with further questions or concerns regarding individual eligibility based on compensation regulations.

Feasibility

The practicality of attempting a research project can be determined with assistance from RACE and the ORA contract's office. This will depend on several variables from available funding, the type of contract, necessary agreements, and what resources are required for the project. These variables regarding the initiation of a project and its proposal are addressed below, but faculty are advised to contact your RACE and ORA Contract Administrator for any specific questions or concerns.

Relevance

Great projects are applicable to the larger efforts of the university, student population, industry, and community. Projects may answer vital scientific or industry questions, fill a need for the community, or provide advanced educational and experiential experience to the student population.

Projects and research investigations should build upon current information. This will ensure the proper foundation of information for project success, as well as a means of saving the project team and any sponsors both time and money.





Relevance (continued)

Investigation into the relevance of a research idea and its current research status should begin with library resources provided through [the Gutman Library](#) and [Scott Memorial Library](#). [Research guides](#) and librarians with specialized topic knowledge are available to assist researchers in the discovery of archived information via the libraries many databases and [special collections](#).

Contact one of the [East Falls Librarians](#) or [Center City Librarians](#) for more assistance.

Librarians can be written into grants for in-depth project involvement after consult.

What kind of research can be performed?

Research at Jefferson University is inclusive to all departments and subject matters within the university. A variety of interdisciplinary projects are encouraged. Through the various resources provided by the university and Office of Applied Research and defined in this playbook, faculty and staff are open to tackle projects ranging from a weekend project sprint to projects embedded in a semester-long course or year-long (or more) deep study based on project requirements and goals.

Collaboration

There are several means of gauging institutional and individual interest in your project idea that can provide great value to your work. Using the faculty research knowledge map program [Profiles](#), institutional researchers can find other experts in a myriad of research fields. Researchers are all encouraged to create their own account on Profile.





Collaboration (continued)

Searchable accounts through Profiles and the Faculty Interests database illustrate possible research connections and assist in the improvement of project collaboration. It is advised that faculty update their account regularly to improve collaborative efforts both on and off campus.

Furthermore, on the East Falls Research Advocates and Jefferson's [Internal Grant Success Program](#) can provide mentorship on research scope and methodology. East Falls Research Advocates are the liaisons between The Office of Applied Research and East Falls faculty. These individuals are vital in the establishment of faculty workshops and assisting with faculty needs, as well as sharing available research resources to faculty.

For a current list of the research advocates, please email AppliedResearchOffice@jefferson.edu. The Internal Grant Mentoring Program provides support for upcoming submissions (new applications or resubmissions), providing reviews of grants. Please contact the program through the [site](#) and provide a refined version of a grant in advance time of grant's submission deadline to ensure a timely review of the application.

[Pivot](#) is a specialty software that creates queries for strictly-defined grants and funding opportunities for institutional research. The PI may also contact RACE or a [librarian](#) for assistance in setting up a Pivot account to target external funding opportunities for their specific research interests. Faculty may also consult [this video](#) for guidance setting up a Pivot account. Pivot can also help you find others on campus with similar research interest.





Collaboration (continued)

A consortium agreement with regional and national universities based on specific topics of interest provide the university and its faculty great collaborative opportunities to expand their research abilities through increased research equipment, funds, and expertise.

There are also extensive processes taken for a sub-award or consultants. Please reach out to your RACE representative for further proper steps in. Additional collaboration resources can be found [here](#).

Building a Team

When construction the research team, there are several considerations to be made by the Principle Investigator (**PI**). Should the PI require additional help with administrative and project-related tasks they may hire a **project manager** (PM) to assist with sponsor and student relationship management, project budget, scheduling, and certain project management aspects. PIs need to include the salary of the PM in the grant request.

Furthermore, students, both undergraduate and graduate level, may be hired or volunteer to participate in a project. Please note that no student may be paid for a project while simultaneously receiving course credit for their work on that project. Additional employment and **compliance** issues must also be considered when involving students in research such as their total yearly workload, work during academic year versus summer semesters, and necessary visas and compliance with **export control** regulations for foreign born students. For a breakdown of different student positions and job codes click [here](#).





Principal Investigators (PI)

The university PI must be an employee holding the academic rank of professor, associate, assistant professor, or instructor at Jefferson or hold an emeritus appointment and uphold all compensation and compliance regulations during the entirety of the project. In addition to their academic and scholarly responsibilities, the PI serves as the project's main initiator and it is assumed that the principle investigator will uphold all administrative responsibilities necessary to successfully complete the sponsored project. Full-time employee who does not hold faculty rank, can serve as PI with appropriate approval. Please reach out to your RACE Representative for further information and documentation.

Please click [here](#) for the PI roles and responsibilities description and policies found in Applied Research MyJeffHub Community.

Click [here](#) for Concur; Jefferson's electronic portal for employee reimbursements, expense reporting and travel booking. The policy for travel and non-travel expense reporting and reconciliation can be found [here](#).

Project Managers (PM)

To relieve the administrative burden placed on PI, project managers are responsible for assisting the PI with all manners of the project lifecycle. Their primary function is to act as project managers, as such they may be delegated any administrative activities pertaining to their respective research project. Such activities may include, but are not limited to: managing student researchers, tending to project budgets and research spreadsheets, handling reports for sponsors, and supplier management.





Project Managers (PM) (continued)

RACE would be responsible for approving all transactions and RACE would collaborate with ORA on all reporting and prior-approval requests. If the PI determines that they will be hiring a PM, the PM salary must be included in the grant request.

Student Researchers

Students may participate as researchers through enrollment of specific academic courses, or participating in an extra-curricular manner. Students may also be hired as researchers or offered scholarships, as well as status as an intern or graduate assistant. Like faculty, students are expected to uphold all employment and compliance standards. When hiring [student workers](#), it is important to follow Jefferson protocol. If failing to do so, a student's financial aid may be put at risk. Please contact your **RACE Representative**, your internal grant administrator or the Office Applied Research, AppliedResearchOffice@jefferson.edu for additional information on the hiring process.

Compliance Standards

Information regarding compliance regulations and your compliance with industry partners can be found [here](#).

Conflicts of Interest and Conflict of Commitment

It is vital that no university employee should hold a position that would compromise their unbiased activities within their role as a researcher. An employee should not receive any means of personal or financial gain from the research being performed. All members of the project team reflect the university and are expected to uphold its reputation and mission.



Conflicts of Interest and Conflict of Commitment (continued)

Additional information regarding conflicts of interest is available [here](#). As an employee you have a Conflict of Interest responsibility at an institutional level. When preparing a proposal, you will have a more specific Conflict of Interest form to fill out done via [Peoplesoft](#).

A *Conflict of Commitment* occurs when a person dedicates time to personal activities in excess of the time permitted by policy, or any other external activities that may detract from their primary Jefferson responsibilities. More information about conflict of commitment can be found [here](#).

Ethics

To ensure that all projects at Jefferson reflect ethical conduct, it is vital that all members involved in projects on campus adhere to policies regarding the compliance of all manners of research employment and activities. During the initiation and planning stages of the project life cycle, faculty should consider the existence of any personal or professional **conflicts of interest and conflicts of commitment**, the use of **human or animal subjects**, and legislation surrounding **HIPPA** and **Export Controls** as discussed in the **compliance** page. To be compliant, all certifications (i.e. institutional Conflict of interest (COI), proposal COI, Assignment of Inventions, Cayuse, Assurance Approvals, etc.) are required in preparing a proposal and will be managed by your RACE representative.





Measure of Project Success

Success is measured by several metrics. The project must meet an experiential, educational, and professional need that defines achievement for both students and faculty on the Jefferson campus.

This may present as an opportunity for student employment, publications for faculty and students, or an innovative idea that creates further research opportunities, patents or licenses. Additionally, industry sponsor satisfaction is measured based on the timeliness and quality of agreed upon deliverables and/or research execution. Government and foundation satisfaction are likewise met through deliverables and work performed based dependent upon the funding provided.

Planning

The Office of Applied Research in collaboration with RACE and other university departments provides resources to assist in the proper design, planning, execution, and close out of sponsored research and industry projects on campus. During the planning stage of project development, the PI and should be aware of the following steps outline in this section. Find a complete pre-award process map outlining the overall planning phase [here](#).

Proposal Intent

Once the PI has determined their personal eligibility and received proper approvals to pursue an opportunity, they must contact their RACE representative.

Please allot at least 4 weeks prior to the start of the project to ensure adequate time is available to obtain all necessary approvals and quality of research requirements.





Proposal Intent (continued)

If you know of the project earlier than 4 weeks prior to the start date, especially a **project embedded in a course** please contact your **RACE Representative** earlier. The PI and all personnel charged to a grant must consult with **RACE** and file an Assignment of Invention (AOI), which is done via Peoplesoft.

There are several types of proposals. The pre-application proposal consists of a summarized form stating the **PI**'s intent to fund the project. New proposals, resubmissions, continuations, and renewals are also processed with assistance from the **grant administrator** and clarification between these proposal types can be found in the [ORA Pre-Award handbook](#).

Please contact your **RACE representative** for any additional questions.

Agreements

Throughout negotiations with project sponsors several types of agreements may be utilized by ORA in conjunction with University Counsel and the Innovation Pillar Office. Agreements range from deliverable contracts to confidentiality and [non-disclosure agreements](#) to material and tech transfer agreements and data sharing arrangements. It is suggested that **PI** familiarize themselves with the agreements that may apply to their project's size and scope. NDAs are the first step to any industry project, please click [here](#) for a the New Project Form. Consult the ORA Contracts representative for more information.





Budget Development

In partnership with the PI, the grant administrator will establish the project budget based upon variables such as required labor hours and personnel effort for all involved personnel including students and project managers, equipment costs, laboratory fees, supplies, travel expenses, conference and publishing expenses, copyright expenses, database research fees, editing fees, and any consultant fees. RACE will help the PI identify any cost sharing required in the proposal submission; the University does not support volunteering cost sharing.

Furthermore, the budget greatly depends on the scope and intellectual property associated with a given project. It is also important to note that the budget must accommodate Facilities & Administrative costs (F&A Costs), also known as indirect costs, from the University. F&A rates are set based on the type of funding. Federal grants and external research are set at 56%, foundation rates are based on sponsor guidelines, and industry in-class rates are set at 35%. A sample budget can be found [here](#).

Clarification on what F&A rate should be used is located in the [ORA General Documents Handbook](#).

Please click [here](#) for the 'Costing Guidelines for Sponsored Projects' that is found in the Applied Research MyJeffHub community.

For questions contact your RACE representative.

Statement of Work

The PI is responsible for completing the technical components of the proposal. This includes a complete Statement of Work which defines the deliverables that will be presented to the sponsor at the project deadline.





Proposal Creation & Approval

During an initial meeting with your RACE representative, the PI's interest in funding is determined. The RACE representative may assist the PI in creating a Pivot profile.

Another resource to faculty during the funding stage is the creation of a Cayuse profile and submission. [Cayuse](#) is another software program utilized by the university to assist in the execution of grant submissions. The grant administrator will develop this profile using information provided by the PI regarding project subject matter and scope. The PI should work with the grant administrator to complete the [Cayuse Access Request Form](#). You can also access the Cayuse sponsor request form [here](#).

Once the Cayuse record has been developed, it will be routed to appropriate managers for approval and then routed to an ORA pre-award representative. The Dean of the college(s), PI and Administrator of East Falls will need to approve. The administrative portions including the complete, fully-approved Cayuse record of a proposal must be submitted at least 5 business days prior to deadline, whereas the statement of work and all technical portions of the proposal are due at least 3 business days before. For questions or concerns contact your RACE representative.

A detailed list of each member and department's roles and responsibilities regarding research and its administration at Jefferson can be found [here](#).

Negotiations

At the onset of industry sponsor discussions faculty are advised to direct all discussions regarding financial negotiations to the grant administrator who reference the [Industry Relationship Policies](#).





Negotiations (continued)

Additionally, prior to conversation regarding project ideas, it is advised that the faculty member consult with the ORA Contracts office regarding a non-disclosure agreement to protect their intellectual property and that of the university.

Determination must be made regarding whether an agreement with the company has been previously established such as a master agreement. With assistance from your **ORA Representative** you can determine whether a standard agreement with the company or entity currently exists. If one has not yet been obtained, the [Sponsored Research Agreement](#) would be a starting point, but the **type of agreement** strongly depends on the size, scope, necessary funding, legal aspects of a project, the interests to the sponsor, and the type of project. Some projects with limited IP constraints can often be initiated in as little as 2 weeks depending on sponsor cooperation and expectations and can utilize the Corporate Funded Project Agreement Short Form.

Additionally, the **PI** and/or other faculty cannot accept awards or sign agreements on behalf of the University. Before an award is accepted, the award notification or agreement with accompanying terms and agreements must be reviewed and approved by the **ORA**. For assistance contact your **ORA representative**.

Account Establishment

After awards are accepted by ORA on behalf of Jefferson University, the ORA pre-award representative will notify the RACE **grant administrator** regarding the status of the proposed budget and compliance of the proposal. ORA must ensure that all projects are compliant to university and federal standards to protect the university's non-profit status as well





Account Establishment (continued)

as protect the intentions of the project and its faculty and sponsors.

Upon complete review, the ORA representative will forward the award notice to the post-award representative. This representative is responsible for notifying the Sponsored Programs Accounting Office (SPA0) where the award is entered into Jefferson's accounting system. The ORA post-award representative will notify the PI and all necessary departments of the new account number, and at this time the account is fully established.

Further details regarding this process can be found at the end of the [ORA Pre-Award Handbook](#) and throughout the [ORA Post-Award Handbook](#).

Funding

Projects are typically categorized as: grants, contracts, or gifts. Find a comprehensive list of funding options [here](#). Federal, state, internal grants and industry sponsored projects are managed through RACE and ORA. Any foundation grants are managed with RACE, ORA and CFR. Any foundation gifts are managed by CFR.

Grants

May be sought through state, federal, foundations, city and industry contract resources with assistance from your grant administrator. Click [here](#) for internal grant opportunities.

Information regarding the complexities of NIH Grant application may be found [here](#).





Contracts

Defines any funds tied to a term and condition that there will be a distinct deliverable and associated timeline associated with the project. Jefferson RACE explicitly defines these deliverables and Statement of Work contractually with the project sponsor once funding for all project necessities has been determined. Prior to submitting any funding requests, the **Office of Institutional Advancement** will also be contacted for a comprehensive list of foundations that offer funding.

Gifts

Any funds without direct connection to a deliverable are considered gifts to the university and are managed through the Office of Institutional Advancement. Further clarification of the definition of a grant versus a gift may be found in the [ORA General Documents Handbook](#). For more information, please contact your **CFR Representative**.

Human Subjects

Before starting any research, interaction, recruitment, or screening of human subjects, or their material or personal information, one of the university's IRB must review and approve the project. This is to ensure the health and wellbeing of any individuals involved in a health or behavioral research, and to comply with all federal regulations on the topic. More information is available [here](#).

HIPPA

Any study involving personal health information of human subjects must comply with the Health Insurance Portability and Accountability Act (HIPPA), a law focused on the protection of an individual's health record and information.





HIPPA (continued)

If your research project involves human subjects and/or health information, contact the compliance office immediately.
more information is available [here](#).

Animal Subjects

Similarly, any research using animal subjects must be approved and adhere to the guidelines defined by the university. More information is available [here](#).

Export Control

Federal regulations prohibit the release of code, software, and various technological advancements to foreign citizens or nations. Such regulations apply to both students and faculty and should be considered when developing your research team, especially if your research involves technological developments.
More information is available [here](#).

Projects Embedded in Courses

If a project will be associated with a course, faculty must consult with their program director and dean about the establishment of the course and its subsequent timeline and educational goals. This will also involve collaboration with the Registrar's Office.

It is notable to mention that any industry projects that occur exclusively in conjunction with the execution of a course do not count separately toward a faculty member's percent effort. That is to say, that their percent effort for that project will effectively be zero as it is accounted for within the faculty's employment contract.





Projects Embedded in Courses (continued)

Percent effort should be discussed with the faculty's operations officer, dean, and program director. Please contact your college's Manager of Academic Operations or college's financial officer for workload management information.

If a project is associated with a class, it is allowable that there be propriety discretion added to the class.

For example, some classes may sign non-disclosure agreements stating that they will not disclose certain information such as the company's name when presenting and discussing the project outside of the classroom.

If a project is embedded in a course please provide your RACE representative the course name and course number.

Execution

During the execution stage of the project, the **PI** and **PM** (if applicable) should be aware of regulations in funds and data management, equipment resources, travel policies, marketing opportunities outlined in this section.

Starting Work

Per the [ORA General Documents Manual](#), work on a sponsored project can only begin after an authorized University Official accepts the award. Once the award is accepted, ORA will notify the PI of the official start date for the project. Limited exceptions to this rule exist but with increased responsibility and risk to program funding.





Fund Management

As the project progresses the **PI** expends funds according to the scope of work and the budget that has been established. The ORA post-award representative approves potential charges to awards. SPAO requests reimbursement of expenditures of the award (if the terms of the award are cost reimbursable).

The ORA post-award representative monitors awards for compliance and submission of reports and SPAO provides financial reporting throughout the execution of the project.

Furthermore, the **grant administrator** will manage awards and alert the PI with any concerns, as well as assist in the determination of the award burn rate to prevent hasty use of an award. Please click [here](#) for the Jefferson's Policy for a PI and PI Roles and Responsibilities found in the Applied Research Community on MyJeffHub. It is important to note that the PI should be fully engaged with RACE on management of grant funds. **Grantbook** is a software a package that will enable faculty to manage their grant budgets, get real time updates, and make financial projections into the future.

For additional information please contact you **RACE representative**.

Equipment

A complete list of Jefferson's Center City Core Facilities and Service Centers are available [here](#). Capabilities for the East Falls campus can be found [here](#). Inquiries regarding current capabilities on the East Falls campus may be emailed to: AppliedResearchOffice@philau.edu





Data Management Plan & Resources

During project execution, the library's databases and services may prove very useful to researchers. Professional writing and editing, is available through RACE's Scientific Editors as well as assistance with biostatistics and other resources available to researchers are outlined [here](#).

[Box](#) is a university cloud-based data storage program which may be used for the storage and sharing of documents. Please note that it is not advised that this program be used for projects involving potential patents as this program does not meet current patent standards.

[Jefferson Electronic Research Notebook](#) (ERN) is a collaborative, secure means of sharing data within a project team. Unlike other programs that create dilemmas when users either retire, graduate, leave the university, or take a sabbatical or leave of absence, Jefferson ERN allows other teammates to access stored data posted by the absent individual.

Additionally, this program automatically time stamps uploaded work. This is beneficial for accountability within a team, but also is an important mandate of research that is grant funded or requires timely updates of the creation of deliverables to sponsors, and important for any project under patent consideration. Furthermore, LabArchives is compliant with both HIPPA and the federal funding agency data management policy. \

For more information and assistance developing a data management plan for your research, please consult a [librarian](#). Additional information regarding data management may also be found [here](#).





Travel

Contact your **RACE respective** and your Office of Operations or Manager of Academic Operations of your respective college prior to any travel. The correct authorization needs to be permitted in [Cayuse](#) and college records. Please click [here](#) or log into our Applied Research Community in MyJeffHub to access, 'International Travel Policies', 'Travel & Non-Travel Expense Reporting and Reconciliation,' 'Unallowable Costs for Sponsored Projects,' and 'Checklist for Travel Expense Reports.' All travel expenses must be approved through the [Concur](#) system by RACE and ORA, after any college approval is obtained.

Marketing, Public Relations, and Publication

Researchers and sponsors at Jefferson University have access to the Marketing and Public Relations Department to assist with outward facing aspects of research projects such as the creation of press releases, promotional material, or branding assistance.

Should your project require marketing assistance contact your college's marketing manager. Further information regarding estimated delivery timelines and contact information can be found [here](#) and a full list of marketing contacts are available [here](#). The Jefferson social media policy can be found [here](#).

Reach out to the Academic Commons early in your process. They can help with many areas, from finding a venue to publish your results, to helping brainstorm and revise your manuscript for publication. Librarians are available to help you follow and meet the funder requirements for publication. Reach out to Daniel.Verbit@Jefferson.edu for more information.





Close Out

During the closure stage, the PI and PM should be aware of the steps involved with administrative and deliverable closure as well as archiving resources.

Administrative Close Out

The PI is responsible for the final progress report and prepares other sponsor-required documents as defined in the original sponsor contract agreement. The ORA post-award representative ensures that all reporting requirements of the sponsor are met. Final reports are due within the allotted time discussed with the sponsor after project termination.

Administrative closure may vary from project to project. More information as well as a complete, color-coded list of grant closure requirements can be found at the end of the [ORA Post-Award Handbook](#).

Deliverable Close Out

The deliverable and how it is transferred depends on many variables including the scope of the project, who is funding the project, the type of funding, and whether the project is associated with the course. All aspects of what is to be delivered, how, and the full expectations of the sponsor or grant must be outlined in the original contract.

Sponsor satisfaction is measured primarily through the transfer of an agreed upon deliverable. This may be a physical item, intellectual property, or data sets proving work toward an in-depth research question.





Archiving

Upon the completion of your research project, librarians can assist with the establishment of your project on the [Jefferson Digital Commons](#), an open source platform to display completed Jefferson University projects and their abstract.

Data sets of all complete and in-progress research projects may also be discussed with a librarian and provided to ensure their proper management. Furthermore, sharing such data sets assists in upholding the validity of the research performed to date and may assist in future research endeavors at the university. Questions regarding archiving or dissemination of projects can be answered by the Office of Applied Research.





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