

Office of Sponsored Programs

Town Hall

Tuesday, April 16, 2024
11:00 a.m. – 12:00 p.m.

Presented by

David Paul | Assistant Vice Chancellor for
Research



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Housekeeping Items

- Meeting will be recorded.
- Recording will be on OSP [webpage](#) after event.
- Use “Chat” for assistance during webinar.
- Use “Q&A” to ask questions that time-permitting will be answered during the event or included in slides once recording is posted to webpage.
- Email OSPCommunications@unc.edu with any other Town Hall questions.





AGENDA

- RAM Reports: Burn Rate Enhancement
- DocuSign CLM & RAM Tracker Transparency
- SPARC Reminders
- Research Core Facility Financial Reports
- Research Core Facility iLab Transition to CBM
- F&A Study Update
- Internal Audits
- Effort Certification
- Research Data Management Core Fee
- Greenphire and Participant Payment Options
- PI Separation and Eligibility Updates
- Carolina Talent and RAPiDs
- SRA/NCURA Campus Training
- Symposium 2024

The background of the slide is a composite image. The top half shows a dense canopy of green trees against a bright sky. The bottom half shows a classical building with a portico supported by several white columns. A large, semi-transparent blue banner with a white border is overlaid across the middle of the image, containing the text.

System & Tool Updates

RAM Reports: Burn Rate

Award Summary

Date of Report 04/1

Award [A22-0100-003](#)
Award Title Efficacy of immunization with 4C-MenB in preventing expe
Project ID [5127998](#) [5127999](#) [5128000](#)
PI Name Duncan, Joseph A
Sponsor 5343 - NIH National Institute of Allergy and In
Sponsor Award # 5-U01-AI162457-03

Award Dates 05/01/2023 - 04/30/2024
Award Purpose Organized Research (110) (OR)
Department 427801 - Globl Hlth and Infect Disease

Financial AR Personnel Personnel Totals Personnel Monthly Monthly Reports

Award Burn Rate 74.82%

Project Summary

Date of Report 04/11/2

Project ID [5127998](#)
Project Title Efficacy of immunization with
Award [A22-0100-003](#)
Award Title Efficacy of immunization with 4C-MenB in preventing expe
PI Name DUNCAN, JOSEPH A
Sponsor 5343 - NIH National Institute of Allergy and In
Sponsor Award # 5-U01-AI162457-03
Department 427801 - Globl Hlth and Infect Disease

Project Status Open (O)
Budget Dates 05/01/2023 - 04/30/2024
Project Dates 05/01/2023 - 04/30/2024
Project Type Federal (FED)
F&A Rate Type On Campus - Organized Research (OR)
F&A Base (Rate %) MTDC (55.5%)

Financial Personnel Personnel Totals Personnel Monthly Monthly Reports

Project Burn Rate 94.44%

Burn Rate Range

90 - 110%

80-89.9 & 110.1-120%

70-79.9 & 120.1-130

<70 & >130

N/A

DocuSign CLM & RAM Tracker Search

- DocuSign Contract Life Management (CLM) is a contract negotiation tool that OSP has integrated with RAM Tracker.
- Streamlines and improves efficiency of agreement negotiation processes.
- Increased transparency of real-time negotiation status via automated [RAM Tracker Search](#) notes, which include sponsor responses.
- Implementation is forthcoming with communication to follow.

- **Subagreement Pre-Drafting Action & Response Certification (SPARC).**
- Released in Fall 2023 to replace Subagreement Initiation Portal (SIP).
- Check status of SPARC actions on [RAM Tracker Search](#).
- Depts should update RAMSeS with most current info on subrecipients.
- Depts should complete a detailed review of SPARC before certifying.
- Detailed instructions on reviewing the SPARC are available in the [SPARC Department User Guide](#) and the [OSP SPARC webpage](#).
- For additional support, contact OSPSubs@unc.edu.



Research Core Development Updates

Core Facility Financial Reports

- Tableau Core Facility Financial Reports: <https://tableau.unc.edu/>.
 - Expense, revenue, and balance information; iLab External A/R report.
 - Rate review status, dates, and CAC Analyst.
- OSP RCD Website- Financial Reporting Info, List of Cores, FAQs, etc.
 - <https://osp.unc.edu/core-facilities/>.
- For support or access to core financials, email RCD@unc.edu.

iLab Journal CBM Transition

- Eff: **May 6**, iLab interface with CC moves to Customer Billing Management (CBM)
- Campus departments: additional info about charge will now be available.
 - Invoice number, name of core, name of service, date service provided, etc.
- Core customers: no impact to iLab user experience.
- Core Facilities: no impact to iLab billing process (follow normal billing process).
- Campus communication with additional info coming next week.
- For questions or iLab support, email coresupport@med.unc.edu.

Cost Analysis & Compliance Updates

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F & A Study Update

- F & A Rate Proposal development is underway using FY2023 financials and space usage for rate calculations.
- Current [F&A rates](#) are negotiated through 6/30/2024 and will remain valid until the completion of the next rate negotiation with DHHS-Cost Allocation Services (CAS).
- More details and communication will be sent when available.

- **Grant Terms & Conditions** – Review completed and final audit report issued on March 8, 2024.
- **Accounts Receivable** – Review completed and final audit report issued on March 19, 2024.
- **Subrecipient Monitoring** – Currently underway (started March 14, 2024) – have selected initial sample of subrecipients to review.

- Current [effort certification](#) period is coming to an end.

Monday, April 1: Escalation Period Begins

- Monday, April 15: Escalation to Dept Chairs / Center Directors
- Monday, April 22: Escalation to Research Deans

Monday, April 29: Certification Period Ends at 5 PM EST

- Additional resources available on the [OSP ecrt Training webpage](#).

The background features a photograph of a clock tower at night, with its illuminated clock faces and a dark conical roof. The image is partially obscured by a semi-transparent blue horizontal band that contains the title text. The top and bottom edges of the image show the dark silhouettes of bare tree branches against a twilight sky.

Research Data Management Core Fees

RDMC Fee Update

- Data management and sharing (DMS) is critical to the future of research and the UNC Research Data Management Core (RDMC) is an important aspect.
- For administrative reasons, RDMC fees currently budgeted/charged have **paused** effective with the March 2024 allocation.
- Alternative methods to fund DMS and RDMC are being evaluated. Until a formal decision is made and communicated to campus:
 - Proposal budgets should **not** include the RDMC fee.
 - Budgeting for DMS costs should continue per sponsor guidelines.
 - Newly awarded proposals submitted w/fee will have fee set-up, but no fees charged.
 - RDMC fees allocated to existing awards are not being reversed at this time.
- Additional information and communications are forthcoming.



Other General Updates



Greenphire

- Committee working on testing and process development for new platform.
- Includes streamlining existing processes with Tango.
- New Position Recruitment.
- Rollout to be announced.



Other Advance Updates

- Recent update only requires PI and Finance Lead signatures on forms.
If PI or Finance Lead have delegated signature authority to others, include that email or memo in writing with the request form.
- Coming soon - new Matrix of payment options.

Faculty/Researcher Separation

- OVCR will soon release an updated [checklist](#) to guide faculty and research personnel with exit activities.
- OSP updated guidance include:
 - Agreements managed by the Contracting team.
 - Notes on working with research administrators throughout the process.

PI Eligibility

- OSP to update [PI eligibility waiver form](#).
- OSP [operating standard 200.03 – PI Eligibility](#) and [200.03 Procedure](#) will include key change:
 - 0.75 – 1.0 FTE has automatic eligibility
 - 0.50 – 0.74 requires chair/dir approval
 - Less than 0.50 requires chair/dir and OSP/OVCR approval.
 - Flexibility to approve PI for term of appointment instead of per proposal



Training



Carolina Talent & RAPIDs

- [Carolina RAPIDs online training](#) is moving to [Carolina Talent](#).
 - Available to all permanent staff and UNC affiliates beginning in May 2024.
- New Foundations courses available with the transition.
 - Course 5: Sponsored Programs Management
 - Course 6: Subagreements - mid/late summer
 - Course 7: Regulatory Compliance - mid/late summer
- Communication forthcoming soon with updates.



Upcoming Training Events

SYMPOSIUM 2024

- **Wednesday, September 25:** (Research Administrators Day) – in person at the UNC Friday Center.
- **Thursday, September 26** – virtual.
- Call for abstracts coming soon and updates to [Symposium webpage](#).
- Suggestions, please email OSPSymposium@unc.edu

SRA / NCURA 2025

- In Spring 2025, OSP is planning to host training from either SRA or NCURA.
- Suggestions, please email OSPTraining@unc.edu.
- More information forthcoming.

Q & A



RAM Reports

Q: Please provide the formula used to calculate Burn Rate in RAM Reports.

A: We will provide this in the guidance when the enhancement is released.

Facilities & Administrative (F & A) Rate

Q: Will Feds potentially issue a provisional rate, or will we keep the 55.5%?

A: The current rates will continue to be used.

Q: Will the RDMC Fee be added to the negotiation for the new F&A rate?

A: Several options are being considered by OVCR and RDMC.

Research Data Management Core (RDMC)

Q: When can campus expect a communication about RDMC updates?

A: We are hopeful that a communication from the OVCR will be available soon regarding the changes (pause to charging the fee and no longer budgeting for the fee). OSP will also be able to provide more detailed guidance once that communication is disseminated.



Q: Who informed OSP to pause using RDMC fees and why?

A: The OVCR oversees the RDMC fee process and pause the fee to investigate the current approach to data management and sharing. Nothing is wrong, more information was needed to evaluate the current process.

Working With Principal Investigators (PI)

Q: What happens if the PI doesn't inform any pre- or post-award that they are leaving? Or if they notify pre-post award only 2 weeks in advance?

A: The intent of updating the checklist and communicating changes is to highlight that PIs need to work with department administrators well in advance.

Q: Who at OSP/OVCR will approve a PI waiver for a PI under 0.5 FTE?

A: David Paul and Andy Johns.

Q: Are the PIs aware there is a Faculty Separation Checklist?

A: We believe its under-utilized. This is why the OVCR is updating the checklist and plans to communicate it more broadly to campus.



Carolina RAPIDs

Q: Once RAPIDs training moves to Carolina Talent, will supervisors be able to link those modules in the professional development plans?

A: Yes! This is the main reason we want to transition, so the online training OSP makes available on Carolina Talent can be assigned.

Q: Carolina RAPIDs could be a great tool to prepare for the CRA certification if it follows the same curriculum. Is this being considered?

A: That is the broader goal that the full RAPIDs cores will be possible for CRA certification.

Industry Budgeting

Q: Regarding industry budgets, should industry-funded non-clinical trials involving human subjects be budgeted for an IRB fee? If so, how much?

A: IRB fees are only assessed to a clinical trial. At this time, no fees are collected for observational, registry or survey only research.



Frequently Used Acronyms

Q: What do the acronyms SRA/NCURA mean?

A: SRA: Society of Research Administrators and NCURA: National Council of University Research Administrators.

Q: What does CBM stand for, regarding the iLab transition?

A: Customer Billing Management





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