

After Training Action Plan: ADMR & The FOA EXAMPLE

My Name Rachel Monteverdi Today's Date March 31, 20X7

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Goal / Expected Outcome: *To utilize the Funding Opportunity Announcement as the first reference for developing the application and throughout the grant management process in order to ensure successful application submissions*

Action Step	Responsible (& names or initials of potential resource person/people)	Resources (To help me be successful)	Timeframes or Deadlines	Potential Barriers	Ways to Overcome Barriers	Results (Successes & challenges included)
<p>Commit to highlighting the most important areas of a FOA & taking notes on specifics with each grant application</p> <p>Habitually note important info in SPS Proposal Memo;</p> <p>Give myself a 'grade' to colleagues (A=thumbs up; C= mid; F= thumbs down)</p>	<p>RHM & manager (JM)</p> <p>(I am responsible but will ask my manager &/or a close colleague to keep me in check)</p>	<p>Note on my computer &</p> <p>Add FOA to my checklist of top items during final review</p> <p>Commit to calling on colleagues in class &/or accountability partner when questions arise</p>	<p>Within 48 hours</p> <p>Weekly grade myself on how well I have completed action steps</p> <p>5 minutes prior to each Quarterly Meeting: Supply thumbs up (mid, or thumbs down) 'Grade' to accountability partner in the lobby</p>	<p>TIME constraints!! If I don't get the application until the last minute, I might not have time to review FOA & take notes</p> <p>Laziness – I'm putting out fires so frequently that I'm tired!</p> <p>Forgetfulness – I just plain forget!</p>	<p>Request monthly (or weekly?) meetings to ensure pipeline</p> <p>Note that I didn't have time to review FOA in Proposal memo</p> <p>INTEGRITY – make & keep my commitments</p> <p>Review new checklist daily as each application comes in</p> <p>Auto-send weekly reminders (with encouragement ;)</p>	<p>This week, I caught & remedied 3 serious issues (expired FOA, travel to NIH required, Administrative Core with Pilot Project mini = Pilot Project mini not a part of Admin Core budget per FOA)</p> <p>This month, I noted 17 important items in SPS Proposal memo</p> <p>Gave myself a BIG thumbs up!</p>

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Within 30 days, know specific systems & critical information necessary to submit an application & provide a 10 minute "Did You Know" demonstration to coworkers	RHM & manager (JM)	Ask 1 coworker who knows systems best (TS) for 5 min. review Lynda.com ORA Trainer – re: FOA, SPS, eSubmissions SAP Trainer re: SAP	Within 30 days Turn in this section of my action plan (results) within 45 days to manager & ORA trainer	Me! Afraid to present to coworkers? Coworkers will act goofy	Positive self-talk; review Lynda.com video on effective presentations Send email with boundaries; 10 minute presentation; no comments until after	Success! My manager picked a small group of colleagues who might benefit from the info & they loved it! I learned a great deal & had fun
Effectively & successfully utilize Duke & NIH systems when submitting grant applications	RHM & will call on most knowledgeable staff who know SPS, Grants.Duke & NIH systems in ORA (TS & RP) RHM & will call on most knowledgeable staff who know SAP (LK & ED)	Set electronic reminders & review FOA & SPS class materials 2 wks prior to submission; Take SAP class; View NIH online videos & tools	SAP class within 60 days; Allocate ½ day to view NIH webinars within 60 days	PI has multiple unexpected 'rush' applications; lack of knowledge of SAP details	Request monthly (or weekly?) meetings to ensure pipeline; review SAP 'Help' or videos within 1 week	Success submitting 28 applications in first month; NO errors; reduced stress; increased communication with colleagues; increased understanding of specific needs within systems while submitting aps