OSP Training Update

HMS/HSDM Research Administrators Open Forum

December 6th, 2023
• Training Team Introductions
• Mapping the Mission
• Training Philosophy & High-Level Timeline
• Onboarding Courses
• Resource Demonstrations
  ○ New Website
  ○ Training Video Teaser Trailer
• Next Steps
• Our Gratitude
Meet the Team

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Mission: To provide robust, agile, and up-to-date training that meets the needs of Harvard's sponsored research community.
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**Training Philosophy**

- **Onboarding**: University-wide research administration onboarding modules

- **Foundational**: Interactive eLearning Introductory courses *(requires Onboarding pre-requisites)*

- **Advancement**: Live-Virtual training offerings and other resources for continued education *(requires Foundational pre-requisites)*

- **Refreshers**: On-the-spot resources to aid in the completion of a task or as a reminder of information
Training Philosophy

<table>
<thead>
<tr>
<th>Training Bucket</th>
<th>Target Pupil</th>
<th>Sample Courses</th>
<th>Delivery Method</th>
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</table>
| **Onboarding**  | I’m new to Harvard and need to know basics about the institution and research administration. HELP!  
<Recommended> *Schools can mandate | ▪ GMAS Basics & Requests  
▪ Intro to OMB Uniform Guidance | ▪ Self-Directed eLearning  
▪ Quarterly “Meet & Greets” for new employees |
| **Foundational** | What are some basic concepts it would be good to know for my job?  
<Manager Assigned> | ▪ Award Receipt & Setup  
▪ Closeout & Audits | ▪ Self-Directed eLearning |
| **Advancement** | I’m loving research administration, give me more!  
<Employee Choice> | ▪ Participant Support Costs  
▪ Subrecipient Monitoring | ▪ Live-Virtual  
▪ Case Studies  
▪ Panel Discussions  
▪ Q&A Drop-Ins (Office Hours) |
| **Refreshers**  | Um...how do I do a cost transfer? It’s been a minute since I took that Foundational course...  
<Employee Choice> | ▪ Travel Regulations  
▪ Proposal Submission Checklists  
▪ Cost Transfer How-To | ▪ Job Aids  
▪ Infographics  
▪ 1-2 pagers  
▪ < 3-minute videos |

Over the next 15-18 months, all high priority training content will be assessed, refreshed and redesigned in alignment with these training buckets. **Schools and Departments will still be responsible for school-specific process and tool training.**
Training Refresh Timeline

Current Area of Focus

July ’23 – January ‘24

January ’24 – April ‘24

April ’24 – September ‘24

All current training offerings, as well as refreshed Onboarding content, will be available on the new website by January 2024.
# Onboarding Courses

<table>
<thead>
<tr>
<th>Onboarding Course Name</th>
<th>(In recommended order)</th>
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<tbody>
<tr>
<td>Sponsored Basics (sub-set of Overview of Sponsored Programs)</td>
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<tr>
<td>The OMB Uniform Guidance</td>
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<td>Cost Principles and Direct Costs on Sponsored Awards</td>
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<td>Systems Overview</td>
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<td>GMAS Basics</td>
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<td>Proposal Development &amp; Submission (sub-set of Overview of Sponsored Programs)</td>
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<tr>
<td>Award Receipt, Negotiation, and Set-up (sub-set of Overview of Sponsored Programs)</td>
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<td>Award Management &amp; Closeout (sub-set of Overview of Sponsored Programs)</td>
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<td>Compliance Fundamentals (sub-set of Overview of Sponsored Programs)</td>
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<td>Intro to Procurement</td>
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<td>Federal Travel Regulations</td>
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<td>Intro to Cost Transfers</td>
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<td>Effort Essentials</td>
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<tr>
<td>Welcome to Harvard and Live Q&amp;A</td>
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Proposed Plan for a Live Onboarding Course

What is it?
- Live-virtual onboarding course for all new Harvard employees whose job encompasses (wholly or in part) research administration functions.
- The goal is to provide a forum to welcome new research administrators to Harvard and review onboarding training content.
- Duration: 50 minutes

What are the Objectives?
- Demonstrate key concepts from onboarding courses.
- Ask questions pertaining to research administration at Harvard.
- Use interactive knowledge check (such as polling) to keep attendees engaged!

How often will it be offered?
- Quarterly: February, May, September, November
- First course targeted for February 2024

Who will be asked to facilitate/monitor?
- The OSP training team will facilitate.
- SMEs will be invited to attend, but no preparation is required.
Website Demo and Teaser Trailer

Teaser Trailer

• Preview of the January 8th launch
• Fourteen onboarding courses, new website, refreshed content

Training Website Demo

• Easy-to-find training and refresher content
• Links to school and department training resources
• Using CampusPress Platform- will be an easy transition in the future
Next Steps

Achievements to Date:

- Conducted Training Survey and analyzed 117 responses to aid in mission/philosophy development
- To ensure our training program is effective and produces the intended results, early iterations of training content were reviewed, including:
  - Over 100 current training courses and related resources
  - Re-platformed Onboarding Courses were further reviewed and the OSP Training team:
    - Resolved over 1,000 comments from more than 35 subject matter experts.
    - Ensured continuity between all content
- Several platforms and software tools were explored for accessibility and diverse ways to offer training resources
- Developed new website to establish the trainings as more intuitive and easier to navigate

Remaining Goals:

- Review and re-platform remaining Foundational and Advanced Courses (75+ training courses and resources remain to be reviewed).
Thank you to everyone who has been involved thus far, particularly:

- Sponsored Core Training Team
  - Lauren Ferrell
  - Amy Maltzan
  - Jennifer Neira
  - Eleanor Kuszmar
  - Rachel Link

- HSPH Learning & Development Team
Thank you!