MARCH 28, 2024

SPA CERTIFICATION PROGRAM

Proposed Syllabus

PRESENTED BY: ALINA GRAYS

ASSISTANT DIRECTOR, SPA EDUCATION & BUSINESS PROCESS

FY25 Session Overview:

- **Application process**: Begin advertising Session 1 (starting in Sept. 2024) in Research Roundup and SPA Weekly Updates for 2 months (starting mid-April). Applications due by mid-July. Application review and acceptance notifications by mid-August.

- **Class size**: A maximum of 18 students will be admitted to the program each fiscal year.

- **What do participants bring to each session?** Laptop, calculator, paper/pen

- **Contract**: commitment of 12 months for all participants, with provision for if they decide the program is not for them at some point along the way.

- **Session Length:** 8:30 AM – 12:30 PM, once monthly

- **Classroom Location**: Trinity Towers Classroom (all in-person sessions)

- **Metrics:** Plan to track attendance, passage of Session Tests and will request feedback for each session (post-session evaluation/survey). Will send surveys to Supervisors and colleague of their choosing (Chair, PI, DA, etc.) at conclusion of 12-months for feedback and if they saw marked improvement/growth.

- **Sessions Tests**: Combination of multiple choice, essay, short-answer and problem solving (as indicated by curriculum for each session).

- **SPA Certification**: Certificates given at end of 12-month program for those who completed and have a cumulative passing score.

Session Schedule:

Basic Science: 8-month program (starting Sept. 2024)

- **September 2024- Session 1**
  - Pre-requisite video to include:
    - Introduction to Research Administration
    - Define research administration
    - Job description of the research administrator
    - What is the research enterprise?
    - History of research administration
    - The future of research administration
    - Infrastructure for research administration
    - Code of Federal Regulations & Uniform Guidance
  - Pre-Award Session 1:
    - Introduce concept of pre-award and proposal development
    - Examine elements of a successful proposal
    - Understand proposed budget, types of budgets, and budget justification

- Q&A
- Session 1 Test

- **October 2024- Session 2**
  - Pre-Award Session 2:
    - Identify/define key personnel
    - Understand indirect costs
    - Review UTSW/SPA signature authority
    - Navigate eGrants

  - Q&A
  - Session 2 Test

- **November 2024- Session 3**
  - Pre-Award Session 3:
    - Funding Agency Overview
      - National Institutes of Health (NIH)
      - Department of Defense (DOD)
      - Cancer Prevention and Research Institute of Texas (CPRIT)
      - Welch Foundation
      - American Heart Association (AHA)
  - Q&A
  - Session 3 Test

- **December 2024- Session 4**
  - Pre-Award Session 4:
    - Introduce non-industry agreement execution
    - Examine federal research contracts/subawards
    - Gain understanding of contract types and potential issues
    - Understand contract amendments/modifications
    - Review terms and conditions
    - Understand subrecipient monitoring and risk mitigation
    - Examine challenges/opportunities of international research

  - Q&A
  - Session 4 Test

- **January 2025- Session 5**
  - Post-Award Session 1:
    - Facilities & Administrative Costs
    - Cost Principles
    - Compliance with Regulations
    - Award Acceptance
      - Review of NOA, terms & conditions, special terms & conditions
      - Setting up a COA and receiving GNR
      - What's next?
  - Q&A
  - Session 5 Test

- **February 2025- Session 6**
- Post-Award Session 2:

- Award Maintenance
    - Team interactions
    - Award modifications
    - Expense monitoring and cost transfers
    - Error correction and transactions
    - Unobligated balance - Planning for year-end
- Revenue & Billing
    - Bill plans overview
    - Collections and Refunds
- Q&A
- Session 6 Test

- **March 2025- Session 7**
- Post-Award Session 3:
    - Financial Reporting
        - Reporting Overview
        - Managing finances and financial reporting
        - eGrants
        - Special considerations
    - Award Closeout
        - Monthly monitoring and financial closeout
- Q&A
- Session 7 Test

- **April 2025- Session 8**
- Post-Award Session 4:
    - Hold time for any residual topics or questions, ad-hoc

- Compliance and Audits
    - Compliance Issues
    - Audits
    - Working with Internal and External Auditors
    - Salary & Wage Confirmation
    - Data Management
    - Responsible Conduct of Research
    - Conflict of Interest in Research
- Q&A
- Session 8 Test

Clinical Research: 4-month program (starting May 2025)

- **May 2025- Session 9**
    - Pre-requisite video to include:
        - Introduction to Clinical Research Administration
        - Define clinical research
        - Types of studies – Fundamentals of clinical trial design
        - Job description of the clinical research administrator
        - History of clinical research administration
        - The future of clinical research administration
        - Infrastructure for clinical research administration

- Clinical Research Overview: Lifecycle of clinical research
    - Clinical Trials: getting started
    - Informed Consent
    - Central office components and Trainings/Resources: CRS/CT Finance/HRPP/OCR
- Q&A
- Session 9 Test

- **June 2025- Session 10**
    - Industry Agreements- Types of agreements, timing of execution, etc.
        - Terms & Conditions
        - Risk Mitigation
        - Intellectual Property Considerations
        - Signature Authority
    - Q&A
    - Session 10 Test

- **July 2025- Session 11**
    - Coverage Analysis Overview
        - Congruency Review
        - Timing of execution
        - Calendaring
    - Introduce Grants/Contracts Mentorship Program & application deadlines- Jennifer Pitman
    - Q&A
    - Session 11 Test

- **August 2025- Session 12**
    - Clinical Trial Finance Overview
        - Clinical Trial Budget Development
        - Invoicing for Clinical Trial Activities (DCT)
        - ClinCard overview and best practices
    - Q&A
    - Session 12 Test