

10th ANNUAL
SYMPOSIUM
FOR
RESEARCH
ADMINISTRATORS

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...be inspiRED

RED

Research. Education. Development.

Research Development for the Research Administrator

University of Wisconsin-Madison

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Objectives

By the end of this session, learners will be able to:

- Understand the core definitions and fundamentals of research development, and how they apply to and complement research administration
- Understand the reasoning (the "why") behind integrating RD best practices into their pre-award skillset
- Build their "RD Toolkit" with specific, actionable skills to assist in proposal development, funding seeking, and interdisciplinary teaming

Where's your RD knowledge today?

I'm new! Learning definitions and what it's all about.

I've got a bit of experience

I have a few years of experience--I'm figuring this whole thing out

I'm an expert!

Definitions and Fundamentals

RA

“A **university research administrator** is a knowledgeable, skilled individual committed to providing financial and administrative management for academic research endeavors in colleges and universities. Research administrators provide the needed administrative and financial support services necessary to develop and maintain outstanding research programs in the organizations they serve.”—**NCURA**

RD

“**Research Development** encompasses a set of strategic, catalytic, and capacity-building activities that advance research, especially in higher education. Research Development professionals help researchers become more successful communicators, grant writers, and advocates for their research. They help researchers bring new ideas to life.”—**NORDP**

Roles & Responsibilities

RA

- Knows institutional policies on research
- Understands sponsor terms and conditions, guidance
- Assists in proposal development and submittal
- Award set up
- Manage and process financial expenditures and transactions
- Manage adherence to terms and conditions

RD

- Finding funding
- Linking with other resources and/or teaming partners on campus
- Conduct research on agencies for proposal matching
- Develop processes and practices for proposal teaming
- Project management of internal/external stakeholders
- Consultation on writing elements of the project/editing



RD at UW-Madison



Research Development at UW-Madison

Connecting ideas, people, and opportunities to advance research.

[About](#)

[For Faculty & Researchers](#)

[For RD Professionals](#)

[Resources](#)

[Tools](#)

[For RD Professionals](#)

What is Research Development (RD)? Why does it matter at UW-Madison? At UW-Madison, Research Development (RD) unites researchers, staff, and partners to advance ambitious, high-impact projects through collaboration, strategic proposal support, and sponsor engagement.



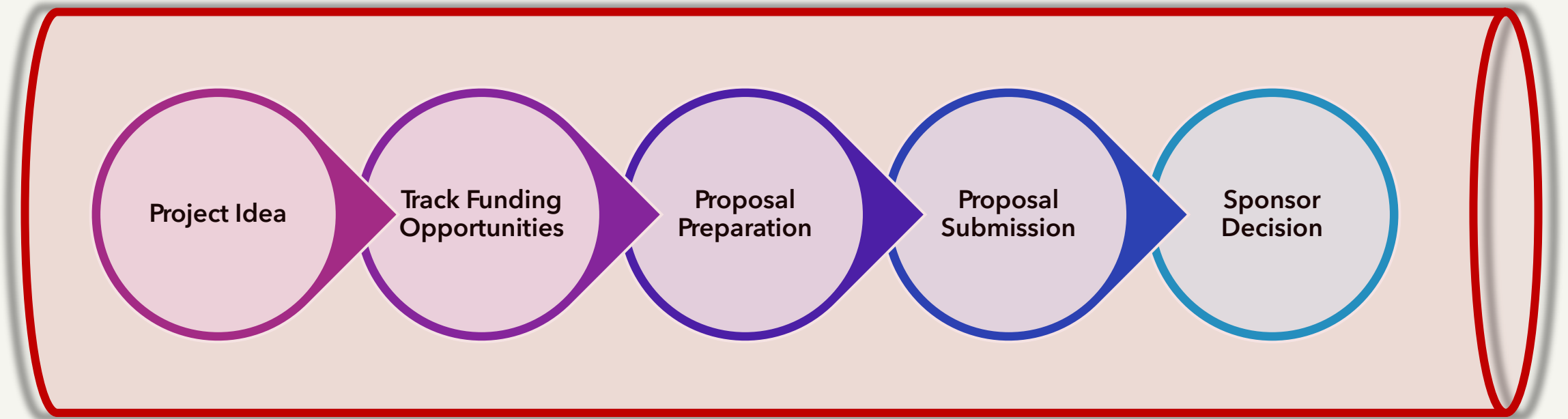
Advancing UW Research

Fostering collaboration, strategy, and innovation to strengthen UW-Madison's research enterprise and amplify its global impact.

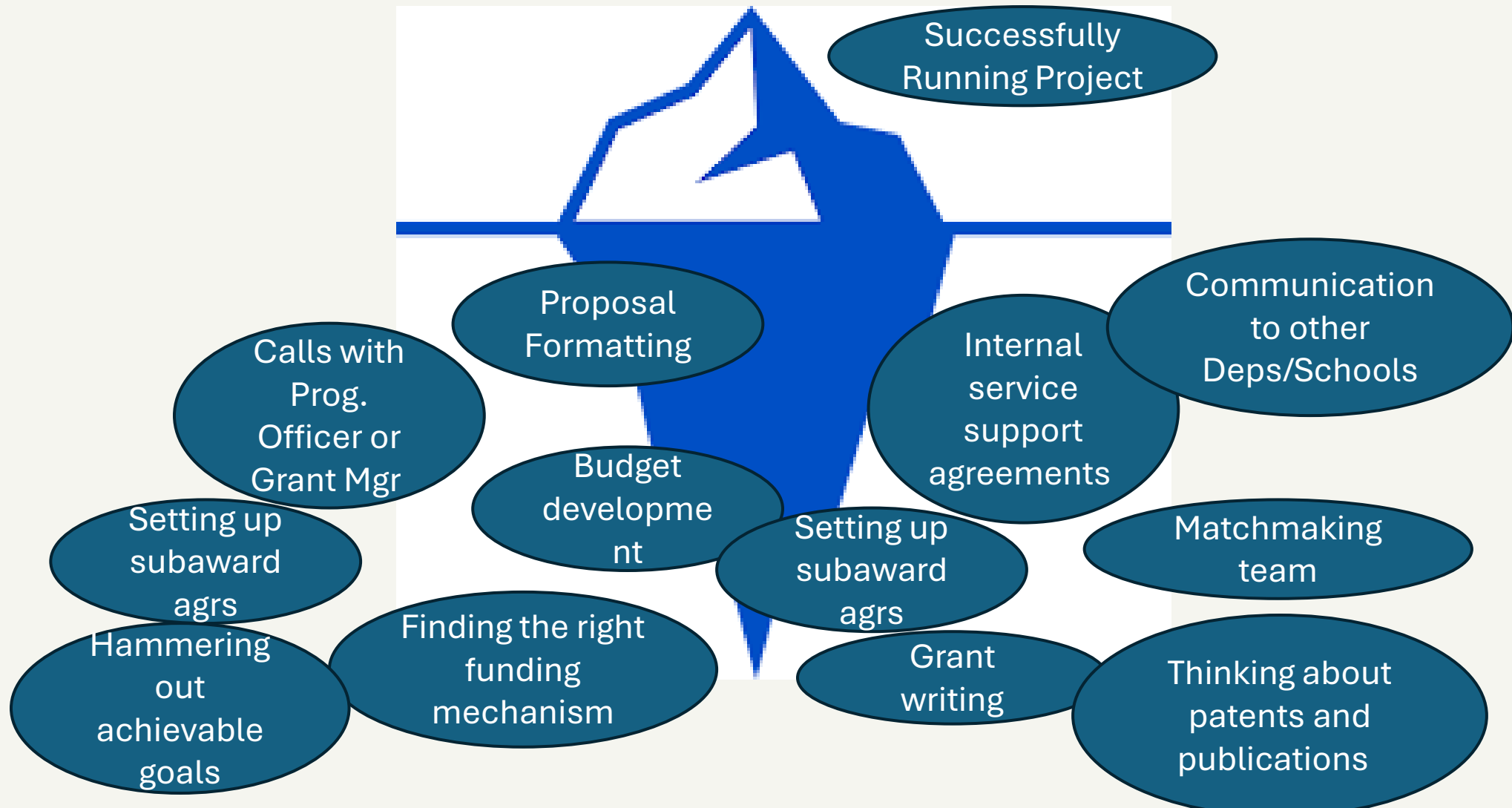
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Importance of RD

RD is the container, it puts someone in charge of picking up the pieces, of facilitating/supporting the connections.



Importance of RD



The "Buckets" of RD

Relationship Facilitation

"Matchmaking"
researchers inside
and outside UW

Team facilitation

Project management

Proposal Development

Find and match
opportunity to
research project

Ensure proposal
matches opportunity
specifications

Storytelling and
Design

Strategic Planning

Ensure all proposals
fit into
lab/school/enterprise
Mission and Vision

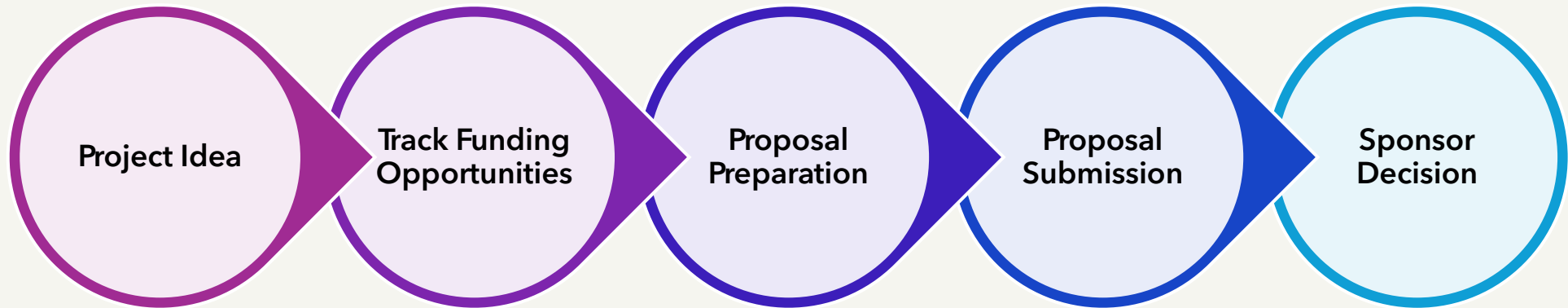
Strategically place
team for new
opportunities

Sponsor Connection

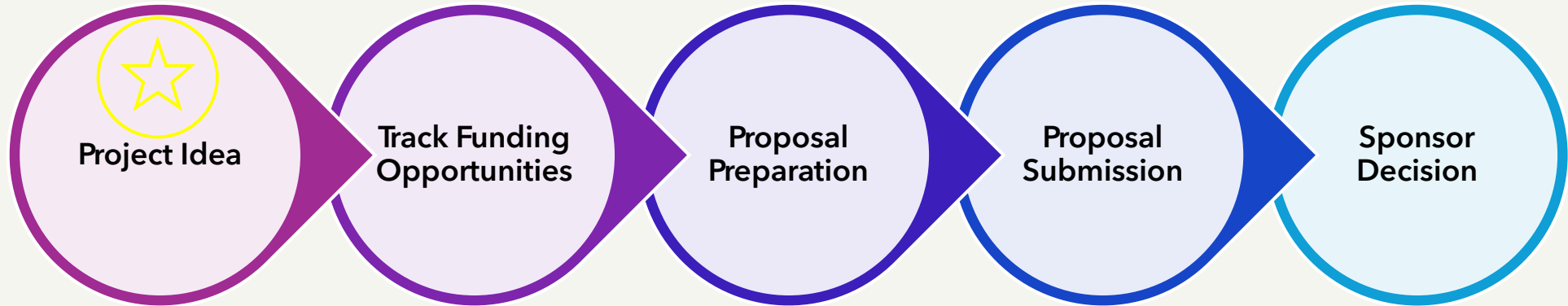
Understand priorities
of potential sponsors

Link researchers to
appropriate sponsor
contacts

Proposal Timeline and the RD Toolkit



The Ideation Phase



Values and Norms

"Blue Sky" thinking – value placed on outside-the-box ideas, ideation, freedom, liberty to speak

Important Activities and Concerns:

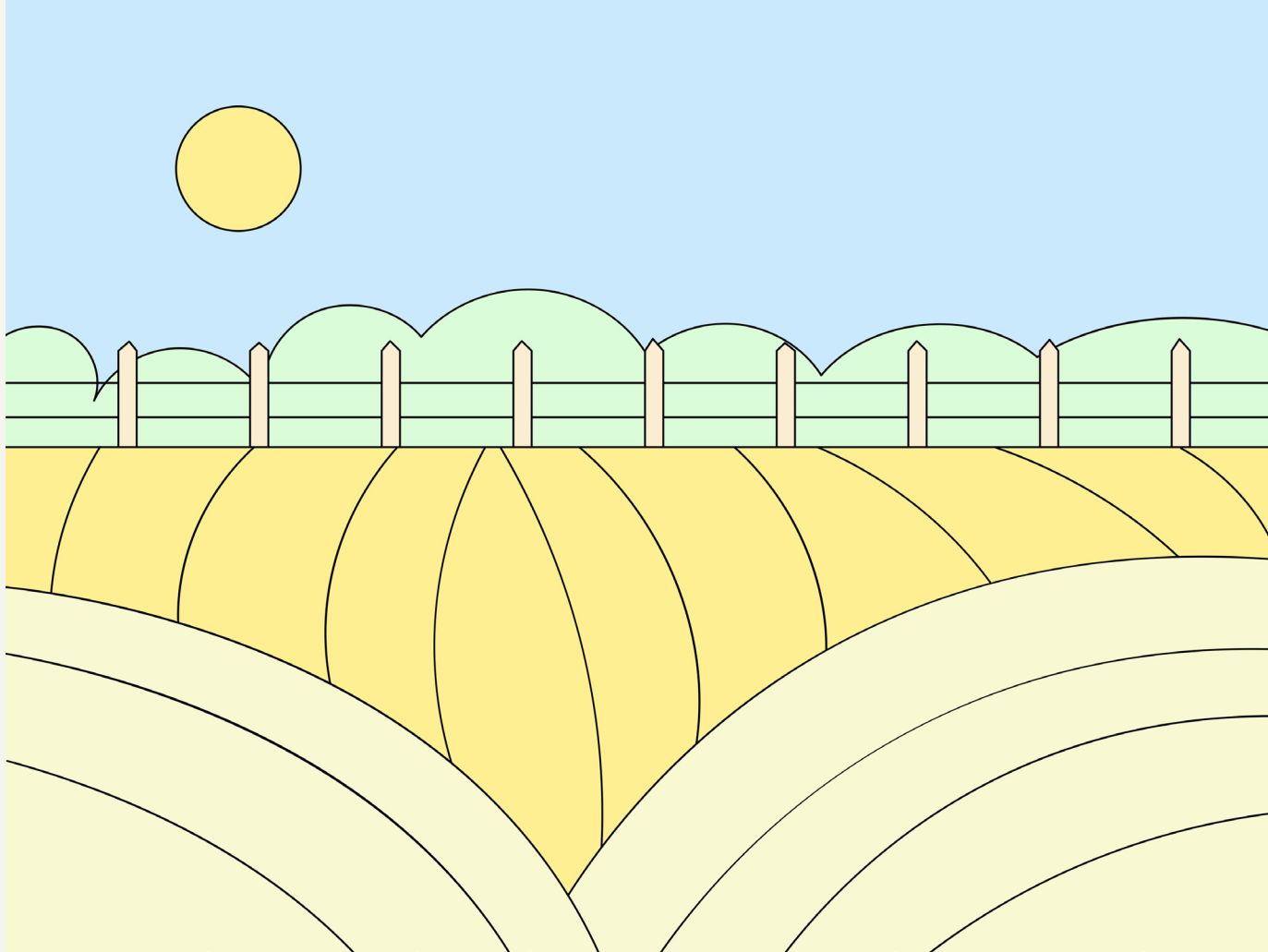
- Team building and recruitment
- Ensuring clarity of vision to all team members
- Ensuring plan fits into overall Mission and Vision of PI/Dept/School etc
- Deep understanding of the proposed project, and the PI's vision overall

Pain points?
Examples?

The Ideation Phase – What does this look like?

	Relationship Facilitation	Proposal Development	Strategic Planning	Sponsor Connections
Low Commitment	Developing communication norms	Begin to consider Storytelling aspects: Who? What? Where? When? Why? Work to understand the team's "voice"	Deep understanding of PI's goals and vision	Consider appropriate sponsors or mechanisms; send team suggestions
Medium Commitment	Assisting in partnering—RABBIT, informal networking		Matchmake to internal stakeholders/resources	
High Commitment	Developing communication tools: team dictionary, mission and vision statements		Ensure integration with the strategic planning/Mission/Vision of your PI/Division/Dept	

The Ideation Phase - Examples



Grassland 2.0

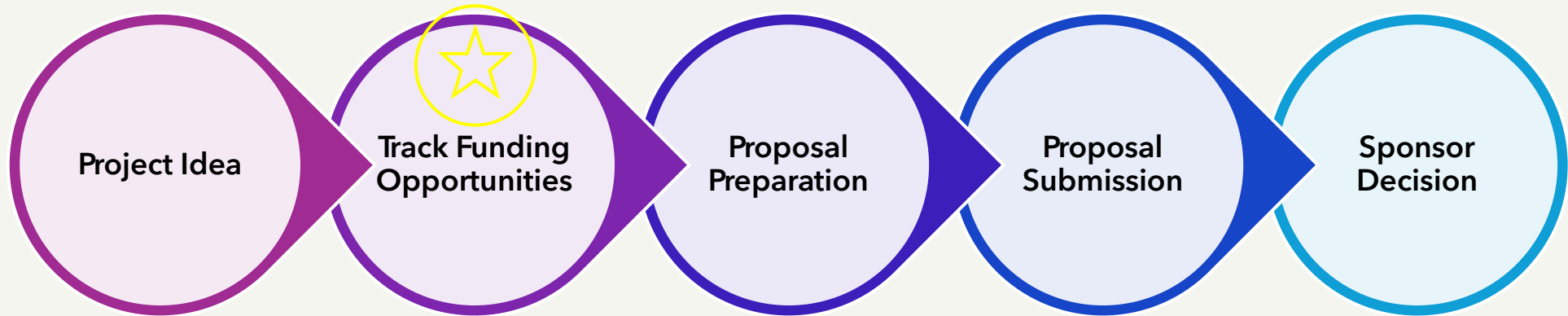
PI winding down 5-year, \$10 million USDA outreach grant & looking for funding to move on to establish “agroecological center”.

NSF Posted RFA for “Science and Technology Centers – Integrated Partnerships” with a maximum budget of \$30 million over 5 years.

I comb through RFA and determine PI is eligible and pitch proposing an agroecological center integrating modern tech for enhanced community outreach/engagement.

**Relationship Facilitation, Strategic Planning
Time Commitment: 3 hours**

The "Matchmaker" Phase



Values and Norms

Thinking pragmatically, but broadly – value placed on knowing sponsor and project priorities, while still able to "cast a wide net"

Important Activities and Concerns:

- Team cementing and roles determination
- Finalization of project priorities (malleable to suit the sponsor)
- High awareness of sponsors and "what is out there"

Pain points?
Examples?

The "Matchmaker" Phase – What Does This Look Like?

	Relationship Facilitation	Proposal Development	Strategic Planning	Sponsor Connections
Low Commitment	<p>Continue to cement team roles and communication norms</p> <p>Consider early career prof suggestions for team additions</p>		<p>Subscribe and watch appropriate listservs/newsletters for funders that suit keywords</p>	<p>Connect PIs to institutional resources from sponsor advice and assistance (ex, Dave Schroeder for DOD)</p>
Medium Commitment		<p>Keyword the project and keyword sponsors—start to prioritize matches</p>	<p>Send RFPs/RFAs to the team as they're released that match keywording</p>	<p>Assist PI/Team in sponsor connections to Program Officers—suggest ways of connecting appropriate for sponsor norms</p>
High Commitment		<p>Assist in writing sponsor outreach materials</p>		

The "Matchmaking" Phase - Examples



Plant-animal systems (very integrated project; cell-plant-animal)

PI invited to submit full proposal to FFAR.

PI could not come up with cost share in time for submission (1:1 required match)

I track opportunities weekly (via Pivot & newsletters/listservs) and suggest low-barrier submission to Simons Foundation: Simons Collaborations in Ecology and Evolution, which allowed for higher budget and no cost share.

Relationship Facilitation, Strategic Planning
Time Commitment: 1 hour per week on tracking opportunities

The Proposal Prep. & Submission Phase



Values and Norms

Clarity and Speed – Tight deadlines, lots of cooks in the kitchen; clear communication and following of deadlines is paramount. Infrastructure to succeed should be in place ahead of this step.

Important Activities and Concerns:

- Good project management and team facilitation
- Deadline-focused fulfillment of proposal tasks that meet sponsor and internal requirements

Pain points?
Examples?

Proposal Prep. & Submission Phase – What Does This Look Like?

	Relationship Facilitation	Proposal Development	Strategic Planning	Sponsor Connections
Low Commitment	Be the "President of Clarity"--ensure everyone is in the loop and appropriately informed and consulted	Safeguard "storytelling" elements—ensure that the message is clear and consistent Ensure the "voice" remains true		Continued vigilance in watching for sponsor amendments, learning opportunities, etc
Medium Commitment	Write out cemented team roles in shared repository for proposal specifically Write out communication plan and timelines	Proofreading for sponsor keywording	Spot checks to ensure proposal continues to fit into overall vision	
High Commitment		Copyediting or writing Graphic design Coordination of mock review		

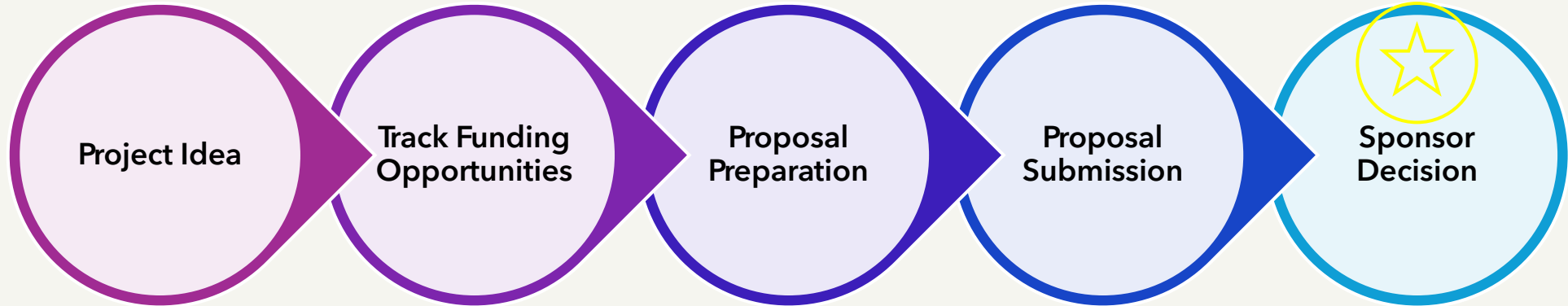
Proposal Prep. & Submission Phase - Examples



The research team sent me their specific aims, and when I read it over it felt a bit all over the place . . . and the formatting was weird. I took time to reformat it to make it look nice, and I suggested they review the keywords we'd pulled from the RFP—*translational, health equity, sustainable*—and ensure they included those exact words in their specific aims page.

Proposal Development, Sponsor Connections
Time Commitment: formatting 30 mins.
Keywording 1 hour.

Sponsor Decision Phase



Values and Norms

Reflection, Processing & Follow up – time for reflection, processing, and follow up with team and program officer(s) should be allotted.

Important Activities and Concerns:

- Meeting coordination & facilitation
- Creating a roadmap for next steps

Pain points?
Examples?

Sponsor Decision Phase – What Does This Look Like?

	Relationship Facilitation	Proposal Development	Strategic Planning	Sponsor Connections
Low Commitment	<p>Coordination of team debrief and next step planning</p> <p>Plan out continued future teaming to ensure momentum</p>		<p>Ensure other partners (dept, other dept) know about the effort; let them know the team is still working and happy to collaborate</p>	
Medium Commitment		<p>Assist team in addressing sponsor feedback</p>		<p>Assist PI in following up with program officer/sponsor for next steps</p>
High Commitment	<p>Assist in next step planning and visioning</p>		<p>Look for pivotable opportunities from other sponsors, or spin off projects</p>	

Sponsor Decision Phase – Examples

I assisted on a large U19 proposal (a center-style NIH grant) which scored well, but didn't get awarded. We had a post mortem and discussed several options. My suggestions were:

1. Spin off R01s (NIH research projects), and specifically an early career project for one of the more junior scientists that could be later wrapped into future centers
2. Consideration of a large, high-risk high-reward style proposal (ARPA-H) that took into account some of the more out of the box ideas they'd originally had, but decided to cut.

I suggested some UW people who could assist in working with ARPA-H, and next steps for both options. We decided to meet again in three months to discuss where we were at.

Relationship Facilitation, Strategic Planning, Sponsor Outreach
Time Commitment: 4ish hours



Major Takeaways

You can serve important roles, with low time commitment, in the research development realm of proposals!

Communication
Manager

Project Manager

Connections and
Relationships
Facilitator

Cheerleader!

It does not take a huge amount of time or specific expertise to be an asset to your research team!

Thank you!

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