

10th ANNUAL
SYMPOSIUM
FOR
RESEARCH
ADMINISTRATORS

NOV 13, 2025



...be inspiRED

RED

Research. Education. Development.



Pre-Title Slide – Option 1
Show while wait to get started



How to Train Your Dragons (aka Your PIs)

Emma Reusch

Gina Barbosa



...be inspiRED

Alright! It's 1:55, so let's get started.

Welcome everyone! Thank you for joining us this afternoon. We're ~excited~ to bring you this session, "How to Train Your Dragons (*aka Your PIs*).

We'll kick things off with some introductions. Gina?

Gina's intro – 1m.

My name is Gina Barbosa, I am part of the Division of Extension I've been there for 3 years as the Agriculture Institute Administrative manager.

I have a small roll in the pre-award and post-award lifecycle, and as an admin staff I support the award management side by educating and enforcing procurement and purchasing policies.

And my name is Emma Reusch.

I'm a Research Administrative Specialist within the Division of Extension.

I support the full grant life cycle. And I started in my role with Extension in October 2024. Before that I was a grants specialist within a unit inside the School of Medicine and Public Health. Collectively, I've been with the University for *just over* 5 years now.

A large part of my role – like I imagine, many of you – is helping our staff and

faculty navigate University policies and procedures to prepare and submit grant proposals, and then managing their funding *after* they get awarded. In addition to that, I also develop tools and trainings for our Institute's PIs. We'll be using one of those trainings – "Seeking Funding at UW-Madison", which explained the proposal submission process to our PIs – as an example throughout this session.

Objectives



Recognize the **value** of **proactive PI training**.



Explore interactive **ways to effectively teach PIs** about the grant life cycle.



Formulate a role-specific plan to **adapt training** approaches **to fit your unit's needs**.

GINA

Our objectives for today are to:

- Recognize the value of proactive PI training in reducing errors and improving research administration workflows.
- Explore interactive tools and techniques for effectively teaching PIs about **UW-Madison's funding & award management procedures**.
- Formulate a role-specific plan to adapt training approaches to fit your unit's needs, incorporating interactive elements, reinforcing institutional requirements, and strengthening RA-PI relationships.

EMMA

So by show of hands – just put your fingers up... – which objective are you most looking forward to?

1? 2? Or 3?

[Insight on what they want most.]

[#2 – those interactive ways to teach PIs. You're gonna hear a lot about that today, so you should leave with some good tools in your belt.]

[#3 – generating that *specific* plan to create a PI training for your folks. You'll have a number of opportunities to work on that today, and the handout to help you.]

[A good mix for each, so hopefully all of you will leave feeling like you learned something informative **and** practical.]

EMMA

And that brings me to my next point of business. This *is* an interactive session. That means throughout our time together, you'll have the opportunity: To speak. To write. To discuss. And to ask questions.

A portion of that, we'll be using the handouts you all have.

Now you might've noticed, that your handouts have: a white and a yellow page. That's because it's ~carbonless 'carbon-copy' paper. What that means is as you work through the *white* pages of your handout, it generates a copy of what you write onto the yellow pages. Then we'll collect the yellow pages before you leave today; that way we get an *anonymous* copy of your fantastic ideas, and the issues you're facing.

And why are we doing this? Well, for 1) Because I'm nosy :P. I'm *super* excited to learn about the issues that you're facing and your ideas on how to address them. Could talk for 30 mins on that; we're not going to.

For 2), Because we need to know what your biggest training gaps with PIs *are* if we're ever going to address them as an institution. And it'd be good to get *realistic* ideas from you all on how we might *close* those gaps. But to do that, we need *data*. So that's what you're helping us generate today with those yellow copies.

You take the white sheets with you for your learning & benefit, and we get the yellow copies for ours.

...

Now that we've set the stage, let's dive into **The WHY**—the times a PI has frustrated us or made life interesting and why that demands we proactively train them.

NEXT



What's Your Dragon Story?

A time when a PI has frustrated you or befuddled you or made life ...*"interesting."*

(EMMA & GINA; 1m)

We're gonna start by talking about '*dragon stories*'.

What is a 'dragon story'? ...Well, it's any time a PI has frustrated you or befuddled you, or made your life *~interesting.~*

For example: When I first started my role in Extension, I found out a faculty person had submitted a proposal – *and was awarded it* – ...but it had never gone through RSP review – or *any* reviews.

Another time, I discovered a staff person had written himself into a *nonprofit's* grant proposal – under their *?staff salary section?* ...Also never went through any internal reviews before we learned about it. So some very **interesting** times for me.

(30s Gina): I received a request from a different college in campus to retro charge salary for one our employees to a grant that no one knew about it neither the employe or the supervisor, there was no record of an ancilliary review. Unfortunately our staff and the program didn't have the capacity to do the work, so we have to ask the other school to find someone else or re-budget

We've all had these stories; it might be why you came to this training. And that's why we're starting here. [NEXT]

What's Your Dragon Story?

A time when a PI has frustrated you or befuddled you or made life ...*interesting*.

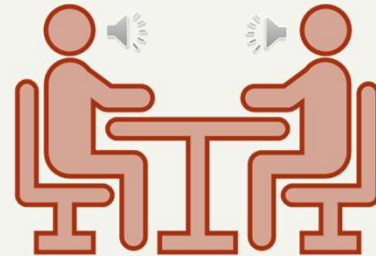
3-min Pair & Share

Find a partner

Describe one of your dragon stories to them

Each get 1.5 minutes to share

Then, other person shares



(EMMA 3.5m)

By sharing your *own* experiences.

We're gonna have 3 minutes to pair and share.

When I say go, find a partner next to you, and then describe your dragon story to them.

You'll have a minute & a half. Then I'll say switch, and the other person will share their story for a minute & a half.

Then we'll come back.

Ready? ...

Go.

[WAIT 1.5m]

Switch!

[WAIT 1.5m]

Alright, time's up! Bring it back.

Thank you for sharing. It sounded like you all found a lot of similarities with those "interesting" situations you discussed.

The great thing about these stories, is that when you step back, they all boil down to a

few common mistakes. We call these “The 3 Ms”.
NEXT

Common Pitfalls: The '3 Ms'

Missed

- Oh, I forgot I had to do that.
- I completely spaced!

Misunderstood

- I thought I could do it this way?
- I already did this & this for you! (...But most or none of it is correct.)

Misassumed/Misguided

- I thought I knew how to do this, but seems no :S

(GINA 1.5min)

The 3 Ms are the 3 common ways PIs challenge us:

They missed something (didn't notice, forgot);

They misunderstood something (thought they knew how things worked, but not quite...or not at all);

Or they mis-assumed [mis-uh-sOOmed] or were misguided about something. (well-intended, or *creatively*-intended, work arounds).

Show of hands

your dragon story, was it about a PI who:

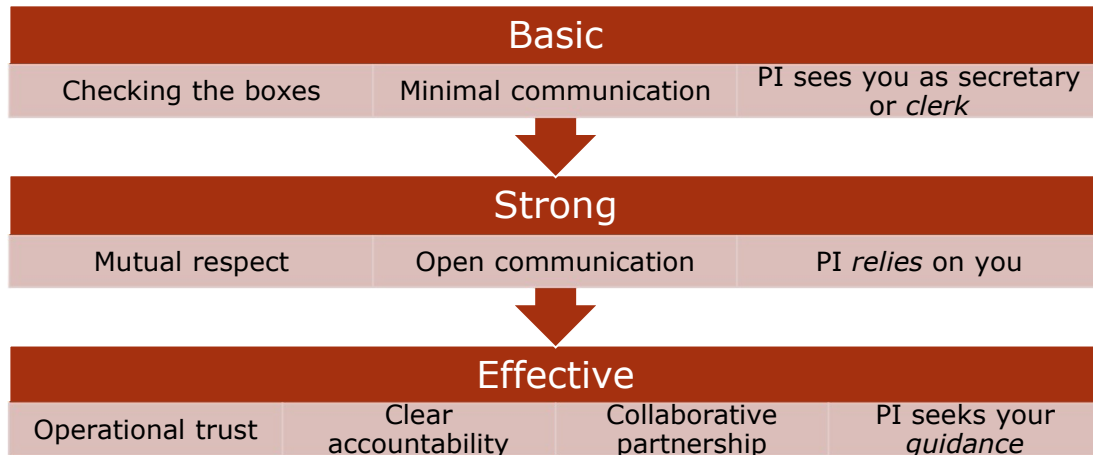
- Missed something? [pause]
- Misunderstood something? [pause]
- Mis-assumed (mis-uh-soomed) or was misguided about something? [pause]

...

I think we can agree: Most of the time, we're not dealing with bad actors. We're dealing with people trying to navigate difficult, unclear, or unknown systems & processes.

Because missing something, misunderstanding something, or misassuming something represent gaps in knowledge or understanding...and they're *trainable*.

Strong Relationships ≠ Effective Relationships



(EMMA 1.25min)

This leads us to an important distinction.

We often hear about the importance of building *strong* relationships with PIs—and many of us have done that, or are doing that. But a strong relationship doesn't necessarily mean an *effective* one.

You might get along well and have mutual respect, but if you're still constantly cleaning up after missed steps or confusion, is that *really* effective? You can like each other and yet, they can still burn the village down.

Let's look at the graphic. A Basic relationship is just checking boxes; the PI sees you as a clerk. A *Strong* relationship involves mutual respect, but the PI *relies* on you. They're dependent, and that's not always sustainable.

What we want is an *Effective* relationship. This involves operational trust (you can trust the work they do), clear accountability, and a collaborative partnership. The PI stops asking you to *fix* all their problems and starts seeking your *guidance* to prevent problems – or to do your part of the process.

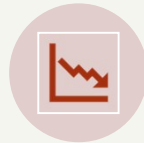
This is where proactive training makes a real difference. When we provide clarity to

our PIs, and *train* them on these processes and the expectations, they can do things properly...or at least, start less fires.

Reasons to Train PIs



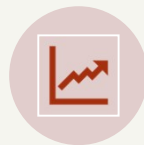
Diverse backgrounds & experience levels



Frequent turnover



Complexity of rules



Boost proposal success

(GINA 1min)

Training PIs is essential because of the administrative context we work in.

First, PIs have Diverse Backgrounds and Experience Levels. Some are new to UW–Madison, others apply less frequently and need refreshers, and they all start from a different knowledge baseline.

Second, we deal with Frequent Turnover – in our administrative staff and our program faculty and staff – meaning that foundational knowledge has to be taught repeatedly.

Third, the Complexity of the Rules is immense—sponsored funding is constantly changing, and that's further complicated by UW being a state-controlled institution.

And finally, training PIs can help boost overall proposal success. It helps PIs develop stronger, more competitive proposals, maximizes efficiency & creativity in resource use, and builds their adaptability to navigate changes throughout the project lifecycle.

The Spark



Our Real-World Example

(GINA & EMMA, 2m)

Now that we understand the necessity of training, let's talk about what prompted us to build a PI training – the *spark* that lit our fuse.

GINA

When I joined the Ag Institute 3 years ago, we had fewer grants, experienced financial staff with deep institutional knowledge, strong relationships, and personalized support (some hand holding). **The perfect storm!** Staff retirements, lengthy hiring process for financial positions, new outreach specialists eager to apply for funding opportunities, existing staff seeking continued support (that hand to hold), and the introduction of RAMP.

All this meant there was a need to train our PIs to own their part of the funding proposal process, but I didn't have the time to do it. So when we hired Emma, I outlined our needs with her on Day 1, that way we could start addressing the problem.

EMMA: I was in an RA-adjacent role before this, so I already knew PIs struggled with pre-award submission and financial procedures.

When I started at Extension, I met with my Institute Director. She told me: "There's not really any pre-award processes here, but I'd *love* for you to implement some."

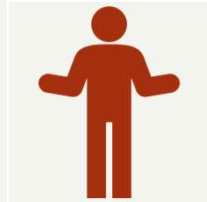
I was **shocked!** The pre-award process has existed for years and had become *more*

formalized over time with RAMP. I quickly realized: most people here weren't just *misunderstanding* this process—they were *completely missing it* and had *no idea* it existed.

Day 1, I realized: We need to train our folks - from the beginning – as if they're all novice Pls.

This realization uncovered our training gap: All of it; we needed to train on all of it. :P

Apply – Identify The Gap



Write 2-3 stressful or frustrating **issues you're facing** with your PIs.



Circle the 1 you want to **focus on** for today.

(GINA, 2m)

This is the crucial step you must take before designing any training. We call this “Identifying the Gap”. You need to identify the specific thing your PIs—your dragons—are consistently getting wrong. What do you wish they just knew?

Look at your handout under Step 1. Take 45 seconds to write down 2-3 issues you're currently facing with your Dragons. It might not be burning down houses or rounding up sheep. But it's likely stressing you out or frustrating you just the same. Go ahead and write those down now.

...(Give 45s)

Now circle the *one* issue you want to focus on for today.

...(Give 15s)

And unique to today's session: We're hoping to collect some anonymous data from you all about the issues you're facing. Because if we're every going to close these gaps as an institution, we need to know what they are.

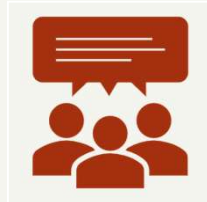
To that end: you should have an index card along with your handout.

We're asking you to write down on that index card, the one issue you circled. We're going to collect the cards before you leave today, so we can use that data to help drive

institutional decision-making.

NEXT

Group Practice – Identify the Gap



2-3 people share out
what you wrote down.



Show of hands: Who has
a similar issue (even if you
didn't write it down)?

(EMMA 3m)

Now let's hear from some folks. What's the issue that you circled? (Call on 2-3 people to respond)

(After each)

Show of hands, who has a similar issue – even if you didn't write it down on your handout.

(Group secretly votes on most common; Emma writes down most common issue.)

Thank you all for sharing and for raising your hands. It's clear that many of you are facing similar challenges, and this is exactly why training is so necessary.

Now that we've identified your specific gap, let's move to the Build. NEXT

The Build

Tools to Keep Your Dragons Engaged



(EMMA, 10s)

How do we engage our Dragons, and create content that actually closes the gap we identified and changes PI behavior?

Engagement Tools & Techniques



Plain
Language



Visuals



Interactivity



Using
Responses



Delivery

(EMMA, 30s)

There's 5 engagement tools we're gonna focus on today: Plain Language, Visuals, Interactivity, Using Responses, and Delivery.

We're gonna go through each one. And then we'll show you some examples– from that training I mentioned earlier, that we delivered to our PIs on “Seeking Funding”.

Plain Language

Avoid

- Avoid riddles; ditch unnecessary jargon

Establish

- Establish shared language

Use

- Use specific & active voice

GINA (2m) REVIEW

Plain language -make things simple

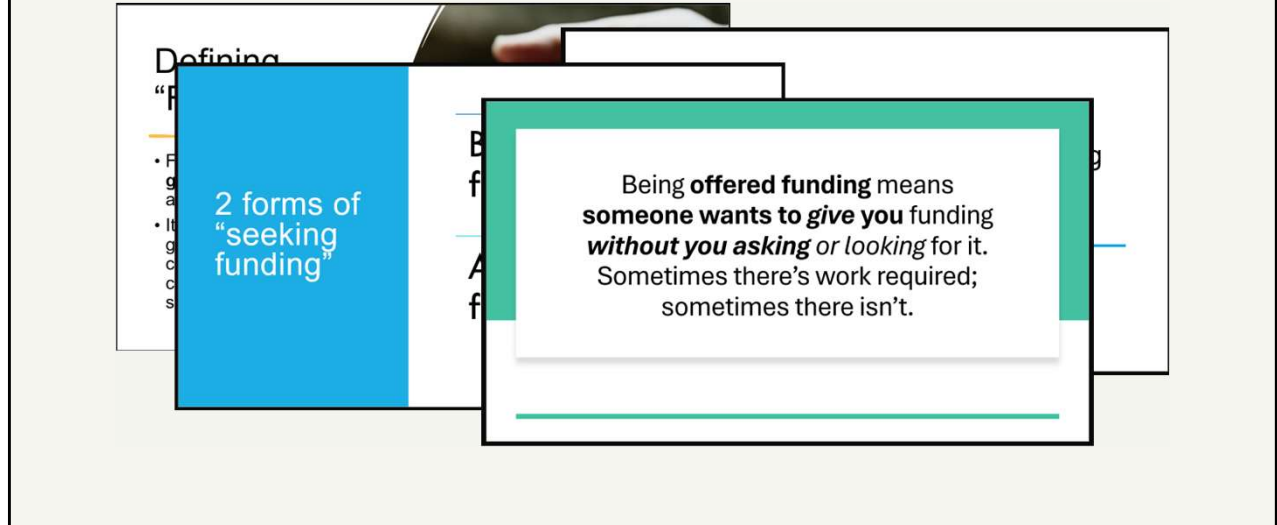
Ditch unnecessary jargon: PI's are experts in their *science*, not in research admin policies or acronyms (like F&A, IDC, pre-award; ECC, even 'sponsored funding'). So when that language isn't critical, skip it or simplify.

Establish shared language: When jargon is critical – or when a term will be repeated – make sure to define it. That way, you're all on the same page.

Use specific & active voice: Explain policies and responsibilities using specifics and tell the PI what they need to do!

Instead of saying "The report must be submitted." – okay, by who? By when? Which report? Maybe even why? – say "The PI needs to submit the progress report by 9/13 because of federal requirements."

Plain Language: Examples from Our Training



GINA 1m

Here’s some examples from our training.

CLICK

Defining funding

CLICK

Defining what seeking funding means

CLICK

Explaining there are 2 kinds of seeking funding

CLICK

Then defining what those kinds are.

NEXT

Visuals



Illustrate complexity



Show AND tell



Use imagery & color



Leave white space

GINA (2m)

Our second tool is Visuals. You can use visual to provide clarity.

E.g., process workflows, decision trees, timelines

Illustrate complexity: Use flowcharts and diagrams to simplify long or confusing processes (like situational decision-making or the proposal process & timelines).

Show AND tell: Try to pair your key spoken points with a corresponding visual (chart, image, icon). This boosts memory.

Use images & color: Use icons and strategic color coding to draw attention and help PIs instantly recall associated rules or information.

Leave white space: Avoid dense walls of text.

The PIs aren't reading it, and if they are, they aren't remembering it. Short paragraphs & good formatting will usually give you ample white space; that helps ensure content is easy to read *and remember*. Your brain only holds so much at one time; make it easy on the PIs.

Visuals: Examples from Our Training

Grant Life Cycle

The diagram shows a flow starting with 'Identify Funding' (blue box), leading to a decision diamond 'This is NOT applying for funding OR a new proposal?'. A 'YES' path leads to 'Get an internal proposal submitted to the funding OR a new proposal?'. A 'NO' path leads to 'This is NOT applying for funding'. A '1' in a circle is next to the 'YES' path.

3 Key Steps to Apply for Funding

There are 3 key steps to apply for ANY kind of funding.

Applying for Funding Decision Workflow

The diagram shows a decision tree starting with 'This is NOT applying for funding OR a new proposal?'. A 'YES' path leads to 'Get an internal proposal submitted to the funding OR a new proposal?'. A 'NO' path leads to 'This is NOT applying for funding'. A '1' in a circle is next to the 'YES' path.

Proposal Submission Timeline

The timeline shows key events and deadlines relative to the 'Submission Deadline':

- 6+ wks before: Notify Gina you intend to seek this funding
- 6 weeks before deadline: Work on the proposal materials
- 3-6wks before: Emma reviews materials
- 3 weeks before deadline: Emma submits; PI certifies
- 3wks b. (before): Division & RSP review; RSP submits
- 2 weeks before deadline: Submission Deadline
- 1-2wks before: (Final review period)

GINA (1m)

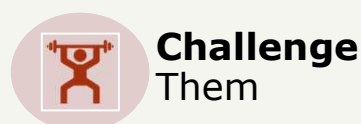
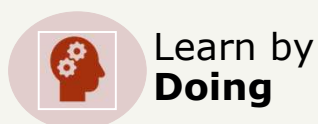
Here's some examples of our visuals.

Grant lifecycle CLICK – most PIs don't know this lifecycle; creates a clear understanding of the process & where we're at & what's coming, if they get awarded.

Workflows & decision trees – break down common, repetitive situations into easy-to-follow actions CLICK; or take a complex process and reduce it down into simple steps CLICK.

Timelines – CLICK if we're talking about time & there's multiple steps: show AND tell.

Interactivity



EMMA (2m)

Our third tool is Interactivity.

This is all about learning by doing, and it's critical for retention.

PIs, like all adults, retain very little from passive listening. By using quizzes, games, case examples, and practice activities, you force PIs to actively use the information you're teaching them. That active use significantly boosts retention compared to simply sitting there – “absorbing knowledge through osmosis”. You're reinforcing their learning by having them apply their knowledge to real-world activities.

This is where Case Studies and Scenarios are helpful.

Use specific, real-world examples that PIs are likely to encounter and have them work through them. Turn those "Dragon Stories" from the last section into teaching moments.

You also need to Challenge Them. No “gimmies” – things that are glaringly obvious, or that you just said 5 seconds ago.

Asking questions that require a slight stretch is actually the optimal learning zone. It helps PIs transform new knowledge into functional information.

And the challenge isn't meant to “get them”.

It's to create a safe space to fail and *learn* from that failure, and to learn and transform new knowledge. It's how we ensure they *understand* the information, *before* a real-world situation happens, and there are real-world consequences on the line. NEXT

Interactivity: Examples from Our Training

<p>Case 1</p> <p>You're thinking of submitting a proposal for the UW-Madison Extension, Dean's Innovation Grant.</p> <p>Is this "applying for funding"?</p>	<p>Pop Quiz!</p> <p>Which of the below is an example of "seeking funding"?</p> <p>A. Using a soil testing kit the University already has</p>
<p>Case Example 2</p> <p>The University of Minnesota is applying for a USDA grant. They want to pay your team to do some work for their project. The work will support their project outcomes. And you're not sending anything to USDA.</p> <p>Is this "applying for funding"?</p> <p>Yes!</p> <ul style="list-style-type: none">• UW-Madison doesn't already have the money.• You have to do work if you get the money.• The work has specific outcomes.	<p>Pop Quiz!</p> <p>What are the 3 key steps to applying for funding?</p> <p>A. Coordinating with admin, preparing required materials, submitting RAMP record.</p> <p>B. Getting approvals, preparing required materials, completing the funding submission process.</p> <p>C. Getting approvals, ensuring you have a PI, completing the funding submission process.</p> <p>D. Coordinating with admin, ensuring you have a PI, preparing required materials.</p>

EMMA (1m)

Here's some examples from our training.

CLICK

You can see from our *first* Case Example, that right away, we started with an *exception*. Which we didn't spend much time talking about.

And they had 30 seconds to answer these.

CLICK

Then for each one, once I revealed the answer, we walked through the key phrases that should trigger the correct decision making.

CLICK

Our quizzes contained *tailored* questions. I don't know what's in a soil testing kit; I don't even know what it looks like. But it's *specific* to the work they do.

CLICK

And even the *quizzes* had some *challenging* questions. That's a lot of words. But it made it *okay* to fail, and then *address* that failure.

NEXT

Using Responses



Ask

Ask and use question-response opportunities.



Dialogue

Prompt open-ended questions and discussion.



Adjust

Adjust examples to better match responses given.

EMMA (2m)

Our fourth tool is about *intentionally* Using Responses you get from your PIs and participants. It's about using feedback *in the moment* to make the training more effective and *relevant*.

Ideally, you've already tailored your content to your audience, particularly with the last tool – Interactivity. *Using responses* helps tailor your content *even further*.

Now to use responses, we need to first *get* responses!

Use question-response opportunities like a quick poll, a show of hands, or even an open discussion question. For example, at the beginning of this training, we asked you which objective you were most looking forward to, 1, 2, or 3. We can then *tailor* the time we spend on different content based on that.

The goal here is immediate feedback and discovering points of confusion or interest. You can even pre-check knowledge this way by asking a question *before* giving a definition or revealing key points.

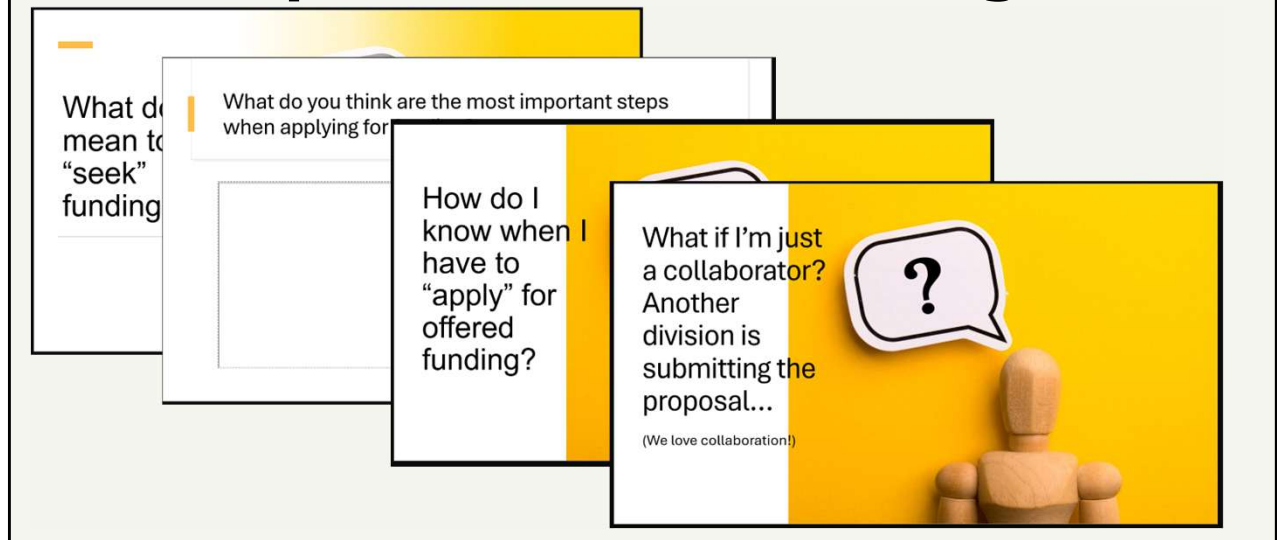
We also want to prompt dialogue. **Ask** *open-ended* questions. When you do that, you make it a two-way conversation – or even a five-way conversation.

Instead of asking ‘Do you *have* any questions?’, which has a yes/no answer and can lead to silence – try asking ‘What questions do you *still* have?’.

We’re trying to surface confusions, pain points, and specific situational contexts that your PIs are dealing with.

This allows us to then *Adjust* the content. You may not be able to change your slides in the moment, but you **can** *verbally* exchange some of your planned examples with a scenario or example that a *participant* brings up. Or like I said before, adjust the *time* you spend on certain content, based on responses. NEXT

Using Responses: Examples from Our Training



EMMA (1m)

Here's some examples from our PI training.

CLICK

We had a pre-knowledge check about a common term. Then we *defined* the term.

CLICK

We had an open discussion about what *they* thought the most important steps to applying for funding were? This helped us identify missing, misunderstood, *and* mis-assumed information, so we could correct it.

CLICK

We gathered *real-world* answers to a policy question, then we *trained them* on the policy, *pulling in* some of the answers they'd given here.

CLICK

Even smaller subtopics were an opportunity to identify common areas of confusion & *correct* our staff's thinking.

And most of these were asked *before* we gave our PIs the information – forcing them to safely *fail* before teaching them how to do *better*. NEXT

Delivery



Vocal Dynamics:
Speak in a varied tone



Pacing: Using
timing to challenge or
keep them engaged



Authenticity:
Don't be afraid to be
human! Jokes,
laughter, *honesty*.

EMMA (2m)

The last critical piece of training is the Delivery itself. We can have the most beautiful slides and the best content... But if we don't deliver it well, it won't stick.

Think about your vocal dynamics. Simply speaking in a varied tone can make a huge difference.

Don't speak in a monotone; I can't tell you the number of presentations I've gone to where -the-presenter-talked-like-this.

If you do that, I'll bet money that your PIs will be checking their email or doing other work by the end of the training.

Use your voice to *emphasize* key points. Pause for effect... or shift your volume when moving to a new topic. Variation keeps people awake, and helps people identify important information.

Next, consider your Pacing. If you talk without taking a breath (if you talk without taking a breath), it can be a challenge to understand you – especially if English isn't your PI's first language.

Pacing is also about the time you spend on content or activities. Use timed challenges to keep momentum going, or plan to slow down during a confusing section to ensure people grasp the content before you test them on it.

And don't be afraid to be human! Be authentic, incorporate honesty, use humor, and allow for empathy and mistakes. When you're vulnerable with people, they tend to return that. When you're honest with people, they tend to return that. Being authentic can help show your PIs that you *understand* them, and the world they're trying to navigate. That human connection goes a long way.

Delivery Examples from Our Training

Objectives

- Define key concerns and differentiators between internal funding and applying for funding.
- Leverage key step processes, including necessary approvals and submission requirements, for applying for funding.
- Apply knowledge to real life scenarios and identify crucial steps in the application process.

Here are our objectives for today. We'll spend most our time learning the step-by-step process and applying knowledge to real-life scenarios.

And to make this information stick, we'll have interactive opportunities like polls - which you just experienced - case activities, and question-response.

And for our first question-response: "which objective are you most interested in?" Just call it out. (pass out treat if ppl slow to participate)

Awesome, looks like folks are looking forward to it. So, let's dive in!

NEXT (by 4min)

Pop Quiz!

Which of the below is an example of "seeking funding"?

- A. Using a soil testing kit the University already has.
- B. Applying for a grant to get a new soil testing kit.
- C. Hoping the University pay you a soil testing kit with their money.

B. You're trying to get money the University *doesn't have*, to get a *new* soil testing kit.

And for bonus points: If your friend at the University of Illinois-Chicago wants to give you a soil testing kit for your project. Is this an example of seeking funding? Someone call out the answer.

NEXT

(Bonus Answer: YES! Offered funding!)

EMMA (1m)

Delivery can feel daunting. It's mostly verbal and physical, so it's hard to show. And if you can't speak off the top of your head, it can feel really daunting. But here's the thing: you can *plan* for an authentic delivery.

I've been reading my presentation this *whole* time. Even these exact words. I script all my presentations. And I use special formatting to give me delivery cues. CLICK

Brackets for when I want to add responsive information. Parentheses with timing or action notes. Ellipses for pauses. Italics for emphasis. Here are a few examples for the training we gave. CLICK

You can see I've written out what I intend to say - *including the delivery*.

NEXT

Apply – Pick Your Tools

Pick 2-3 specific engagement tools you want to use to address the training topic you circled.

Plain
Language

Visuals

Interactivity

Using
Responses

Delivery



GINA

2m Solo Activity – Choose Your Training Tools

What tools will best help you train your dragons?

Take a minute and a half to pick 2-3 engagement tools you want to use for your training to address the topic you chose.

And be specific. Don't just say visuals, say timeline or workflow.

Group Practice – Pick Your Tools

2-3 people
share out tools
you wrote
down

Can be as
specific as you
like!

(GINA 3m)

Now let's hear from some of you. What is one tool you wrote down?

You can be as specific or detailed as you like, but don't tell me just 'plain language'.

[Pick 2-3 people to answer.]

(Write down these 3)

NEXT



SURPRISE!

We've Been Building a Case

EMMA (40s)

Surprise!!

We've actually been building a case example this *entire* time.

Think back to when you all shared about the common issues or gaps you're facing. And we asked you to raise your hands if you're experiencing similar.

We wrote down the most common issue based on your responses: [[State chosen topic]].

And just recently, when you shared out about specific tools you want to use. We wrote down those tools, and they're gonna serve as the tools for our *group* case. [[Restate tools chosen.]]

So...ready to dive into some group practice on how to adapt our tools to our chosen issue?

Group Practice

– Adapt the Tools

60



How can we adapt these tools to the group's chosen topic?



The topic we chose:



The tools we chose:

(EMMA 2.5m)

Let's quickly review the scenario we built:

The topic we chose is: [[State chosen topic]]

And the tools we chose are: [[State chosen tools]]

Our challenge is to answer the question: How can we adapt these tools to the group's chosen topic?

I want you to focus specifically on: [[1 specific tool]].

I'm gonna give you *30 seconds* of quiet time to formulate *1* specific, creative idea for how we can use this tool to address our challenge *in a PI training*. CLICK
(Give 30s) [play music]

Okay, minds are churning! CLICK

Now, we're switching to a *60-second* Popcorn Brainstorm. Anyone and everyone, please **shout out** your idea! Let's see how many brilliant adaptations we can generate in one minute. Go! CLICK

[Collect info for 60s] (Write on a board?)

Time is up! That was an incredible rush of ideas, showing how *powerfully* you can adapt these tools to a real-world scenario.

And, you now have a fresh perspective on tackling this topic.

Apply – Adapt Your Tools



Think of specific ways you can adapt the tools you wrote down to **address the topic you circled.**



If you get an awesome idea on how to use another tool, feel free to write it down!



GINA

1m Solo Reflection:

Take 1 minute to think about specific ways you might adapt the tools you wrote down earlier to address the topic you circled.

And if while you're thinking about it, you get an awesome idea on how to use another tool, write it down as well.

CLICK

[Give 60s] (music runs out)

NEXT

The Shift

What worked vs. didn't?

What surprised us?

What changed after the training?

GINA & EMMA

Now let's talk about the impact of the PI training we gave.

What worked versus didn't?

Gina:

- Worked: We broke up the training into preaward and postaward so that we were able to focus content on urgent painpoints.
- Didn't work: We had some unique CALS-Extension integrated faculty who have different processes to follow; created some confusion but got them thinking about the process.

Emma

- Worked: Using tailored examples & working w Gina to get those right proved to be very beneficial for our learners.
- Didn't work: We'd planned for a 1-hour presentation, but it got reduced to 45 minutes. That wasn't really enough time for an interactive training. Fortunately, people were interested & stayed late – even with Lunch right after.

What surprised us?

Gina: The amount of people; the diversity of experience-levels in the room

Emma: Like Gina said, a *full* room of people was *amazing* to see. There were TONS of questions during the session too, and people even stayed after to talk & ask us questions.

What changed after the training:

Gina: PIs realized: I made a mistake

Emma: PIs asked questions or checked in first

Gina: an understanding that there are grants AND there are agreements (particularly MTAs)

Emma: Our staff understood special admin processes for getting different PI status levels. This is unique because Extension has mostly academic staff who are PIs, rather than faculty PIs

Emma: And we saw an overall greater awareness of the process + shared vocabulary when people interacted with us beyond the training.

And the materials are still a resource for our staff today.

Benefits to RAs – Why Train PIs



Reduced stress



Improved RA-PI relationships



Increased deep work opportunities

(EMMA, 1m)

We've covered the 'how' of training, but this is the most critical slide: what's in it for *you*?

Investing in effective PI training has three *powerful* benefits for your own workload and job satisfaction.

First, Reduced Stress and fewer crises. Proactive training cuts down on PI mistakes, meaning you spend less time firefighting and cleaning up dragon-sized messes. Which means you can shift your focus from reactive and survival tasks to more strategic or proactive work.

Second, Improved RA-PI Relationships. When expectations are clear, PIs feel more *confident* in their abilities to handle their tasks. And this allows you to trust them more to complete those tasks accurately. Making the relationship *effective*, not just strong.

And this creates Increased Deep Work Opportunities. Less time spent corralling your dragons or cleaning up their messes frees up your schedule to focus on strategic work, *complex* challenges, or even skill development.

The effort you put into training your dragons comes right back to you as time, clarity,

and peace of mind.

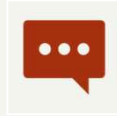
NEXT

Apply – Share Your Thoughts



Identify 1 person to share your training idea sketch with.

Even if that's us!



Send them a quick message.

“Are you available this week to chat about developing a PI training?”



Meet with them!

Grab a coffee or spend 15 minutes talking through your idea.

(EMMA, 1.5m)

We've reached the final 'Apply' step. We want you to anchor what you've learned by completing a *short* action step *right now*.

For the next minute, your task is to:

Identify 1 person—a peer, a mentor, or even us—to share your training idea with. —I'd love to know your idea.

Send them a quick message via email or Teams, asking to chat about developing a PI training.

Then commit to meeting with them, even for just 15 minutes, to talk through your idea.

I promise you, it's 15 minutes well spent out of your busy, busy days. Because if we don't start getting proactive about PI training, we're *always* going to be reacting.

And frankly, that sucks.

(Give 60s)...

Key Takeaways



Strong ≠ Effective. Clear is kind.



Proactive training reduces fires.



Use scrolls and maps (aka plain language & visuals), not riddles.



Engagement is crucial. Let them try (and fail) safely.



Training dragons takes time but so does cleaning up ash.

GINA

We have covered a lot of ground today. Before we open it up for Q&A, let's quickly review our key takeaways:

Strong doesn't equal Effective. Clear is kind.

A strong relationships doesn't mean an effective one. Clarity can help *both* you & your PI.

Proactive training reduces fires.

Teach early & often – before you're putting out a fire at 4:59PM.

Use scrolls and maps, not riddles.

Visuals and plain language beat jargon and email novels any day.

Make it *easy* to learn and understand.

Engagement is crucial. Let them try (and fail) safely.

Quizzes, scenarios, and real-world choices help PIs *actually* learn.

Training dragons takes time but so does cleaning up ash.

Invest upfront. The return is fewer messes and stronger partnerships.



GINA KICK-OFF (aim to have 5min remaining)
What questions do you have, or *still* have ;) ?

Thank you!

Emma Reusch

emma.reusch@wisc.edu

Gina Barbosa

gina.barbosa@wisc.edu

Here's our contact information.

Happy to share the training we did as a jumping off point, or to connect & follow-up about your ideas!

Resources

Cartoon images generated by Google's Gemini Model.

Peyruis. (2019, December 7). *Dolce Vita* [Audio file]. BreakingCopyright - Royalty Free Music. Licensed under CC BY 3.0. Retrieved from <https://breakingcopyright.com/song/peyruis-dolce-vita>

Keys Of Moon. (2020, January 10). *Flowing Energy* [Audio file]. BreakingCopyright - Royalty Free Music. Licensed under CC BY 3.0. Retrieved from <https://breakingcopyright.com/song/keys-of-moon-flowing-energy>

Reusch, E. (2025, March 13). *Seeking Funding at UW-Madison: A Roadmap for PIs: Understanding how to seek and apply for funding at UW-Madison* [PowerPoint slides]. Office of Financial Services, Division of Extension, UW-Madison. Retrieved from <https://uwprod.sharepoint.com/sites/EXT-AgInstituteTeam/SitePages/PI-training-in-Extension.aspx>

Sappheiros. (2017, February 14). *Truth* [Audio file]. BreakingCopyright - Royalty Free Music. Licensed under CC BY 3.0. Retrieved from <https://breakingcopyright.com/song/sappheiros-truth>

The Scientific Adventures of Beardman. (2022, December 19). 60 second countdown timer. YouTube. <https://www.youtube.com/watch?v=zeJZD6awSb4>