

THE OSP EXCHANGE

GETTING TO KNOW YOUR OSP PARTNERS: OSP Structure/Functions

Office for Sponsored Programs
Boston College

MEET YOUR NEW OSP DIRECTOR

Key Areas Overseen:

- Sponsored Programs
 - Proposal Review & Submission
 - Billing & Reporting
 - Cash Management
 - Audits/ Financial Compliance
 - Effort Reporting
 - Subaward Management & Monitoring

Key Initiatives:

- Grants Management Process Improvement
- PeopleSoft Reporting Capabilities
- New Systems Implementation



Jennifer Lopez
Director, Office for Sponsored Programs
Email: Jennifer.Lopez@bc.edu

Past experience:

Director for Research Operations Finance, Dartmouth Hitchcock
Director of Sponsored Programs, University of Miami
Associate Director for Research Administration, Duke University



OUR GOALS

Deliver customer-friendly, timely support

Expedite research through improved navigation and access to resources

Reduce administrative burden for faculty

Improve customer service

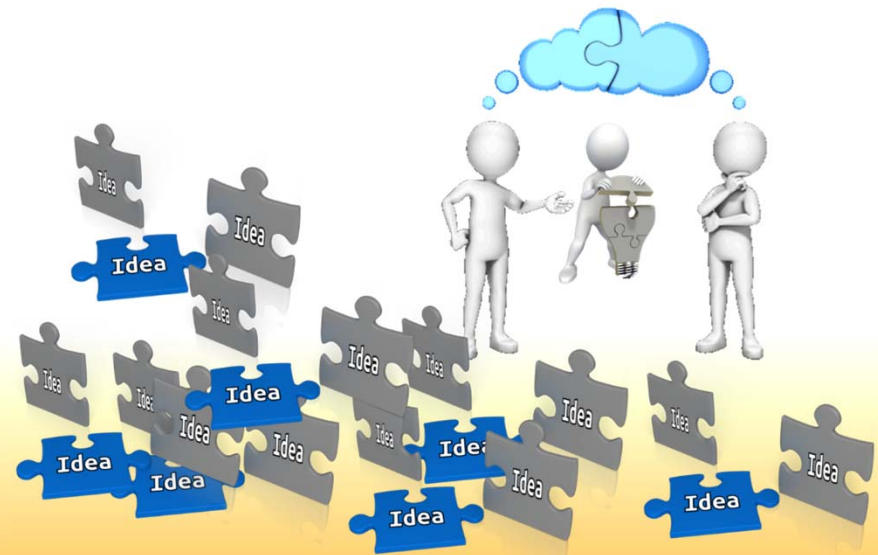
Build a more collaborative environment

Improve communication and expand educational opportunities

Foster process improvement



WHAT DO YOU THINK OSP DOES?



OFFICE FOR SPONSORED PROGRAMS



What our families think we do



What PIs think we do



What deans/directors think we do



What we think we do



What our bosses think we do



What we actually do



OFFICE FOR SPONSORED PROGRAMS

Provide support to PI's and Departmental Administrators on pre and post-award processes

OSP serves as the Authorized Official and signature authority for proposals and awards

All requests for external funding to outside sponsors must be done by a designated OSP Pre-Award representative (or University Advancement depending on certain Foundations)

All submission requests must be routed via a Proposal Transmittal Form (PTF)



For more information, please refer to Boston College Principal Investigator's Handbook and Boston College Research Policies and Procedures on our website: <https://www.bc.edu/osp>

WHAT IS OSP RESPONSIBLE FOR?



Pre-Award

Proposal Administration

Work in collaboration with PI's and Departments on proposal process

Provide guidance in the development of proposals

Ensure sponsor requirements are met

Review and endorse proposals for submission to sponsors

Negotiate terms and conditions of awards on behalf of the institution

Facilitate the submissions of non-financial reports

Award Set-up



WHAT IS OSP RESPONSIBLE FOR?

Post-Award

Monitor financial compliance matters

Submit all financial reports to awarding agencies on sponsored projects

Facilitate BC's response to all external & internal financial audit requests

Responsible for ensuring effort certification and reporting is accurate

Assure reimbursement of project expenditures, based on terms and conditions

Cash Management and Collections

Closeouts

Outreach and Support

Provide outreach and ensure effective partnerships with our many customers

Provide support to PI's and Departmental Administrators on pre and post-award processes



Training modules can be found on the VPR website: <https://www.bc.edu/vpr>

Click on this icon



KEY PIECES OF INVOICING AND REPORTING

- Analytical review of financial data for compliance risks and accuracies.
- Inclusion of backup documentation.
- Process specific transactions in order to closeout the project.



SPONSORED FUNDING AT BC

On average how many proposals are reviewed and submitted by OSP?

Over 300 proposals requesting nearly \$200M in external funding

In a fiscal year how much sponsored funding is managed by OSP?

Nearly \$100M in sponsored funding as of FY21

How many active sponsored projects does Boston College currently have?

Over 500 active projects, including subawards



Effort, Subrecipients, and Auditing



EFFORT

Provide Guidance for:

- Cost Distribution Changes on Sponsored Projects
- Salary Cost Transfers

Manage Process for:

- Payroll Cost Share Entries
- NIH xTrain Termination Notice Approval
- Fringe Benefit Adjustments (sponsor allowability)
- Effort certification



SUBRECIPIENT MANAGEMENT

- Establish outbound subawards
- Track all new subawards and amendments
- Manage FFATA reporting



SUBRECIPIENT MONITORING

- Subrecipient risk assessment prior to issuing new/amended agreements
- Review/analysis of annual audit reports



OSP ORGANIZATIONAL CHART

Who We Are

Jennifer Lopez
Director of OSP
617-552-3344

Susan Hoban
Associate Director
Office for Sponsored Programs
617-552-3061

Francesca Visconti
Associate Director
Financial Mgmt & Compliance
617-552-3398

Sponsored Project Administration Team:

Matylda Bylinska
Assistant Director
Pre-Award Administration
617-552-1583

Michelle Gittens
Senior Assistant Director
Pre-Award Administration
617-552-4978

Karen Jarvis-Thorne
Senior Assistant Director
Pre-Award Administration
617-552-3374

Rose Cornet
Senior Assistant Director
Pre-Award Administration
617-552-3373

Angelica Wilshire
Grant Proposal & Contracts Administrator
Pre-Award Administration
617-552-1492

Natasha Brown
Assistant Director
Post Award Administrator
617-552-1545

Bryce Kelley
Assistant Director
Post-Award Administration
617-552-6873

Eric Texeira
Senior Assistant Director
Post-Award Administration
617-552-3189

Christie Raynor-Cohen
Post-Award Assistant Director
617-552-2969

Management Information Systems Team:

Susan Noonan
Information Systems Manager
617-552-1303

Daniel Terminello
Information Systems Analyst
617-552-2248

OSP offices are located at 31 Lawrence Ave.

Main phone number: 617-552-3344

Fax number: 617-552-0747

Find your designated OSP representative on our website: <https://www.bc.edu/osp>
by clicking on this icon



Team Department
Assignment List

PROCESS IMPROVEMENT

Current Process Improvement Initiatives

Shopping for Time and Effort software

Finding IT software solution for potential automation of proposal development and grants administration

Narrowing down useful PeopleSoft reports for post-award management, providing easier access to PI's and training on how to find their reports

Sharing of Funding Opportunity Announcements on a recurring basis

Building of a cohesive Professional Development Program within the VPR for faculty and administrative staff

Revamping VPR website (which includes OSP) and the VPR Newsletter



OSP's OUTREACH FOOTPRINT

- Provide daily guidance and resolutions to customer's inquiries on many complex topics
- Develop and present at newly established monthly OSP Exchange with topics you suggest
- Be available to come to you/your department to assist with pre and post award management



Training modules can be found on the VPR website: <https://www.bc.edu/vpr>



WHAT WE DON'T DO...

- Determine cost allocations or decisions to place costs on projects
 - Determine re-budgeting needs
 - Initiate proposals
 - Initiate cost transfers
 - Process procurement transactions
 - Expense reconciliations
 - Effort allocations
- BC's Service Center Model
 - Arts & Sciences Service Center
 - Jack Lane, Director
 - Lynch School of Education Service Center
 - Jean McDonald, Director
 - Carroll School of Management
 - Carla Boudreau, Assoc. Dean Finance & Admin.
 - Connell School of Nursing
 - Christopher Lee, Assoc. Dean for Research
 - Institute for Scientific Research
 - Pat Doherty, Director
 - School of Social Work
 - Sveta Emery, Assoc. Dean Finance, Research & Admin.
 - Law School
 - Joe Vitali, Assoc. Dean Finance & Admin.
 - Center for Centers
 - Peter Marino, Director



PROPOSAL SUBMISSION POLICY

Proposal Submission Guidelines:

At least **seven** days prior to the submission deadline, OSP must be notified that you have a proposal submission pending. You can accomplish this notification by sending an email to your OSP Pre-Award representative notifying them of a pending submission

Internal Deadlines

Five days prior to the submission deadline you must submit a complete proposal to OSP consisting of the final versions of the following:

- Proposal Transmittal form and Conflict of Interest form
- Draft proposal narrative (project description, research strategy, etc.)
- Final budget with narrative budget justification
- All subrecipient documents (scope of work, budget, budget justification, letter of commitment signed by an authorized official of subcontractor)

If a PI does not meet the OSP 5 business day deadline, BC requires special approval from the Office of the Vice Provost for Research. The PI must submit a written explanation of why the deadline was missed and request an exception be made.



OSP's Proposal Submission Policy can be found here on the web:

<https://www.bc.edu/content/dam/files/research/osp/ProposalSubmissionPolicyAugust2015.pdf>

PROPOSAL SUBMISSION CHECKLIST



OSP Proposal Submission Checklist

Principal Investigator

Are you applying for the correct Funding Opportunity Announcement (FOA)?
Is the individual applying authorized to be a PI on the proposal? Contact OSP if there is any doubt.
Did you read and follow the guidelines in the FOA and the application instructions?
Does the proposal conform to page and font size limitations imposed by sponsor?
Does the proposal include all necessary attachments (e.g., biographical sketches, certifications and assurances, quotes, current/pending/other support, budget and budget justification)?
If collaborators are included in the proposal, are the letters of collaboration included?
Does the sponsor have a limitation on the number of proposals permitted to be submitted by the University? If so, has this been coordinated with VPR and OSP?
If the sponsor is a foundation or a corporation, has the BC Corporation and Foundation Relations Office been notified?
Have you sat down with your DRA to ensure that all required elements of the proposal included?
Have all subcontractors sent budgets and completed Commitment Form signed by their institutional officials? Have these been forwarded to OSP?
Has the PI notified DA (department administrator) of his/her intent to submit proposal?
Has the PI reviewed the electronic Proposal Transmittal Form & completed Conflict of Interest?
Has the PI approved the electronic Proposal Transmittal Form?

Department Administrator

DA initiates a new Proposal Transmittal Form in Proposal Transmittal Module in PeopleSoft and sends email to OSP pre-award contact with PTF number.
Review the budget. Does the budget accurately reflect the work proposed? Has the budget been calculated correctly?
Review the entire proposal to ensure it meets all the criteria of the FOA i.e. font size, word limits?
Are the correct fringe benefit and F&A cost rates (aka, indirect cost rate) used? VPR approval is required for waived F&A. Chair approval needed for buyouts.
Has the DA sent a completed copy of the proposal to OSP 5 days prior to deadline for review?
Have all subcontractors sent budgets and completed a Commitment Form signed by their institutional officials? Have these been forwarded to OSP?
Has the DA completed the entire Proposal Transmittal Form including: uploading entire proposal, the Request for Proposal (RFP), sub commit form and other sub documents (if necessary) and creates work flow for approval.
Has the routing of the Proposal Transmittal Form been completed?
Has an OSP signature been obtained on the application forms and/or cover letter prior to submission?
Has the DRA set up meetings with the PI to go over proposal requirements/budgets formats.
Remember to provide OSP a copy of the final submission.
Is the deadline date a postmark or receipt date?
Has the DRA contacted Corporate Foundations Relations if this proposal is a foundation proposal?

OSP Pre-Award

OSP pre-award provides final review of the proposal for compliance with BC and sponsor regulations and policies.
OSP pre-award receives PTF and confirms information on PTF matches what was submitted to the sponsor.
OSP pre-award provides necessary official signatures, submits proposal and approves PTF.

To access from the OSP website, click on the highlighted box below

SPONSORED PROGRAMS

Coronavirus Updates

BC Research Policies & Federal Regulations

Funding

Assistance Documentation & Forms

Institutional Profile

PeopleSoft Financials

Revised 09/27/2021



OSP's Proposal Submission Checklist can be found here on the web: <https://www.bc.edu/content/bc-web/research/sites/vice-provost-for-research/sponsored-programs/assistance-documentation.html>

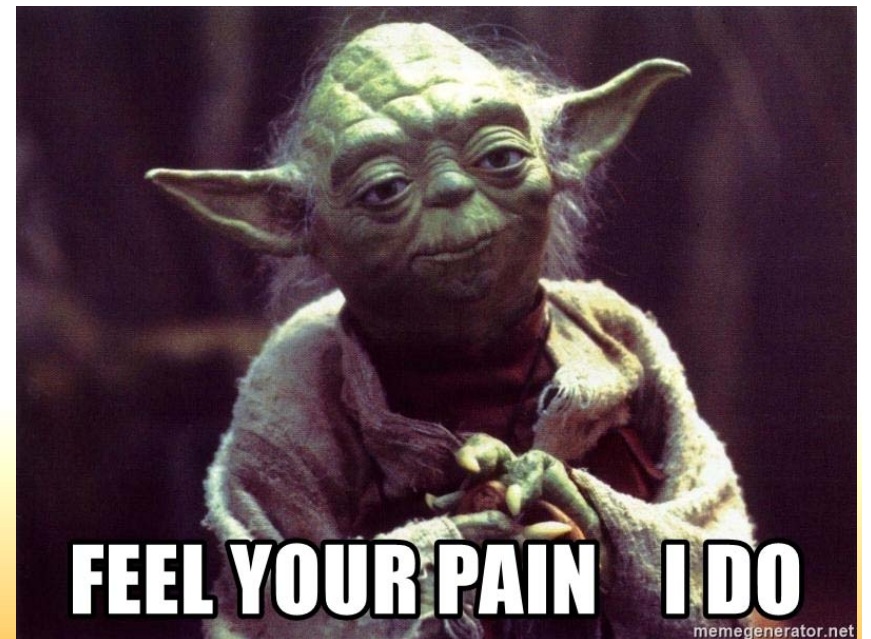
WHAT IS THE PROPOSAL TRANSMITTAL FORM (PTF)?

In lieu of an automated pre-award system, the PTF is used to support the proposal submission process by collecting vital proposal information and obtaining internal approvals via workflow.



WHAT THE PROPOSAL TRANSMITTAL FORM IS NOT.

- Easy to use.
- Glitch free.
- Intuitive.



PROPOSAL TRANSMITTAL FORM – PAGE 1.

Proposal Form

Step 1/7

1 2 3 4 5 6 7

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Proposal Form and PI Details

* Fields are Required, Please enter all required fields before submitting the proposal, you can save proposal without required fields.

Business Unit: GRANT
Proposal Form ID: 3899

Version: P1
Proposal Status: Posted to Grants Proposal

Print PDF

Proposal Details

Proposal Title: Collaborative Research: HCC: Small: Bridging Research an
Long Description: Collaborative Research: HCC: Small: Bridging Research and Visualization Design Practice via a Sustainable Knowledge Platform
Purpose: BARE Basic Research
Proposal Start Date: 05/01/2022
Proposal End Date: 04/30/2025
Sponsor: G300000 National Science Foundation-LOC
Prime Sponsor:
OSP Proposal ID: 21090260
Created By: Joanne Nesdekidis

Type: New
Subtype (if applicable)
Sponsor Award #:
Solicitation #: NSF 20-591
Current Award #:
Due Date: 09/30/2021

Proposal Projects

Find | View All First 1 of 1 Last

Sequence #: 1
Institution: BCOSP Boston College
Department: 053901 Computer Science
Subdivision: 053901 Computer Science

PI & Co-PI's Information

PI/Co-PI	PI Employee ID	Name	Contact PI	Primary PI	Phone	Email	Institution	Department ID	Subdivision	Location
PI	36150445	Kim,Nam Wook	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	617/552-8003	kimry@bc.edu	BCOSP	053901	053901	01401S256

CFDA	Program Title	Primary
47.07	Computer and Information Science and Engineering	<input type="checkbox"/>

PROPOSAL TRANSMITTAL FORM – PAGE 2.

Proposal Form

Step 2/7



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Personal Conflict of Interest

All questions are required, please answer all questions before moving to next page.

Business Unit: GRANT

Proposal Form ID: 3899

Disclosure Statement

Employee ID: 36150445 Sellick, Velva Noma

Project Role:

Department: 

Sponsored Project Title: Collaborative Research: HCC: Small: Bridging Research an

Name of Funding:  National Science Foundation-LOC

Project Begin Date: 

Project End Date: 

Important Note to Principal Investigators: Compliance with the Federal regulation requires disclosures from all "investigators" who are defined as "the project director or principal investigator and any other person, regardless of title or position, who is responsible for the design, conduct, or reporting of the research funded, or proposed for such funding, which may include, for example, collaborators or consultants." Please identify on the last page of this form those that you consider to fall within this definition for this project.

PROPOSAL TRANSMITTAL FORM – PAGE 2 (CONT.)

The following disclosures can be found in the Forms and Reports section of Interfolio. Please review all three forms carefully. If you have not previously completed these disclosures, please contact bcfarhelp@bc.edu for assistance.

- External Activities and Conflict of Commitment,
- Significant Financial Conflict of Interest, and
- Additional Activities for Funded Research disclosures as reported in Interfolio.

1. Please check ONLY ONE of the boxes below to confirm your disclosures in Interfolio:

- Are current and accurate - no changes
- Have recently been updated as of: (Please put date Interfolio was last updated.)

2. If this proposal/project is related to any of the conflicts and/or activities that you have disclosed in Interfolio, please identify the following information regarding this conflict/activity.

Name of Organization:

Role at this Organization:

Activities Performed:

% of time spent on this activity/at this organization: Monetary Value?

Certification: I have read and understand the Addendum to the Boston College [Conflict of Interest and Commitment Policy Pertaining to Sponsored Projects](#). I agree to submit a revised disclosure in the event that conditions change which would revise my response to any of the questions above.

I Agree

Date:

Name:

PROPOSAL TRANSMITTAL FORM – PAGE 3

Proposal Form

Step 3/7



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Add person for Col

Please enter persons you think should fill Conflict of Interest.

Business Unit: GRANT

Proposal Form ID: 3899

Proposal Projects

Find | View All First 1 of 1 Last

Sequence #:

Add Employees for Conflict on Interest Form

	Empl ID	Name	Date Email Last Sent	Send Email?
1				<input checked="" type="checkbox"/>

View COI Details

Personalize | Find | First 1 of 1 Last

Employee ID	Name	View Content
1 36150445	Sellick, Velva Noma	View Content

Send COI Emails

Save

Return to Search

PROPOSAL TRANSMITTAL FORM – PAGE 4

Proposal Form

Step 4/7



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Next >

Enter Budget Details

Please enter all required fields before moving to next page.

Business Unit:

GRANT

Proposal Form ID:

3899

Proposal Projects

Find | View All

First

1 of 1

Last

Sequence #:

1

Proposal Project Budget Details

Find | View All

First

1 of 1

Last

Budget ID:

STANDARD

Budget Period - Year 1

Total Direct Costs:	\$51,643
F&A (Indirect) Costs:	\$29,178
Total Request:	\$80,821
Total Cost Sharing:	
Total Proposal Value:	\$80,821

Budget Period - All Years

Total Direct Costs:	\$158,096
F&A (Indirect) Costs:	\$89,324
Total Request:	\$247,420
Total Cost Sharing:	
Total Proposal Value:	\$247,420

Applied Rates - Percentage

FT Exempt	29.50 %
FT Non-Ex	48.30 %
PT All	7.65 %
F&A Base	MTDC
F&A Rate	56.50 %

Save

Return to Search

PROPOSAL TRANSMITTAL FORM – PAGE 5

Proposal Form

Step 5/7



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Certification

Please check all applicable and enter all required fields before moving to next page.

Business Unit: GRANT

Proposal Form ID: 3899

Proposal Projects

Find | View All First 1 of 1 Last

Sequence #:

1

Administrative and Regulatory Concerns

Find | View All First 1 of 1 Last

- | | | |
|--|--|--|
| <input checked="" type="checkbox"/> Human Subjects | <input type="checkbox"/> Vertebrate Animals | <input type="checkbox"/> Information Technology |
| <input type="checkbox"/> Hazardous Materials | <input type="checkbox"/> Radioactive Materials | <input type="checkbox"/> Faculty Buy-out |
| <input type="checkbox"/> Select Agents | <input type="checkbox"/> Toxic Substance Control Act | <input type="checkbox"/> Subrecipient Organizations |
| <input type="checkbox"/> Recombinant DNA | <input checked="" type="checkbox"/> Export Controls | <input type="checkbox"/> Required Cost-Sharing |
| <input type="checkbox"/> Biological Agents | <input type="checkbox"/> New or Modified Space | <input type="checkbox"/> Requested/Required F&A Waiver |
| <input type="checkbox"/> Cross Departmental | | |

▶ Export Controls

Save

Return to Search

PROPOSAL TRANSMITTAL FORM – PAGE 6

Proposal Form

Step 6/7



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Add Attachments

Attach all supporting documents.

Business Unit: GRANT

Proposal Form ID: 3899

Proposal Projects

Find | View All First 1 of 1 Last

Sequence #:

1

Attachments

Requests	Attached File	View Attachment	Delete
1	Kim_-_NSF_-_Final_Submitted_Proposal_-_8-1-21.pdf	View Attachment	

Save

Return to Search

PROPOSAL TRANSMITTAL FORM – PAGE 7

Proposal Form

Step 7/7



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Select Approvers

Please select all which need to approve this proposal form.

Business Unit: GRANT

Proposal Form ID: 3899

Proposal Status: Posted to Grants Proposal

Approvals

When selecting Work Flow approvers, be sure to select the appropriate Approver Type (ie Dept Chair, Dean Etc.). Once you have selected the applicable approver type, the names of the appropriate individuals will appear in the box below the approver type. You will then need to indicate who the appropriate individual to approve will be. This will be done by checking the box next to their name. Please make sure the names of the individuals you want to approve have been checked off in the box next to their name prior to hitting 'Submit for Approval'. Once 'Submit for Approval' has been clicked, your individual selections will be deleted and you will automatically be taken to the Work Flow on page 1.

Principal Investigator

PI ID	Name	Email Address
36150445	Sellick, Velva Noma	zydjr@bc.edu

Co-Principal Investigator

PI's Department Chair or Designee

Select for WF?	PI Dept Chair	Name	User ID	Email Address
<input type="checkbox"/>	59658221	Halifax, Pearly	STRAUBIN	eiwagjol@bc.edu

Co-Principal Investigator Department Chair or Designee **Select only if Co-PI is located in another Department**

PI's Dean or Designee

Co-Principal Investigator Dean or Designee **Select only if Co-PI is located in another Department**

Submit for Approval

Save

Return to Search

PROPOSAL SUBMISSION PROCESS

PI (principal investigator) identifies funding opportunity and reviews the Proposal Preparation Checklist

DA initiates a new Proposal Transmittal Form in Proposal Transmittal Module in PeopleSoft and sends email to **OSP pre-award contact with PTF number.**

PI notifies DA (department administrator) of his/her intent to submit proposal



PROPOSAL SUBMISSION PROCESS

DA completes entire PTF form including: uploading entire proposal, the Request for Proposal (RFP), sub commit form (if necessary) and creates work flow for approval.

Dept. Chair receives PTF: reviews and approves form and sends PTF to next approver.

PI receives PTF. PI reviews form & completes Conflict of Interest. PI approves PTF and the PTF is sent to the next approver.

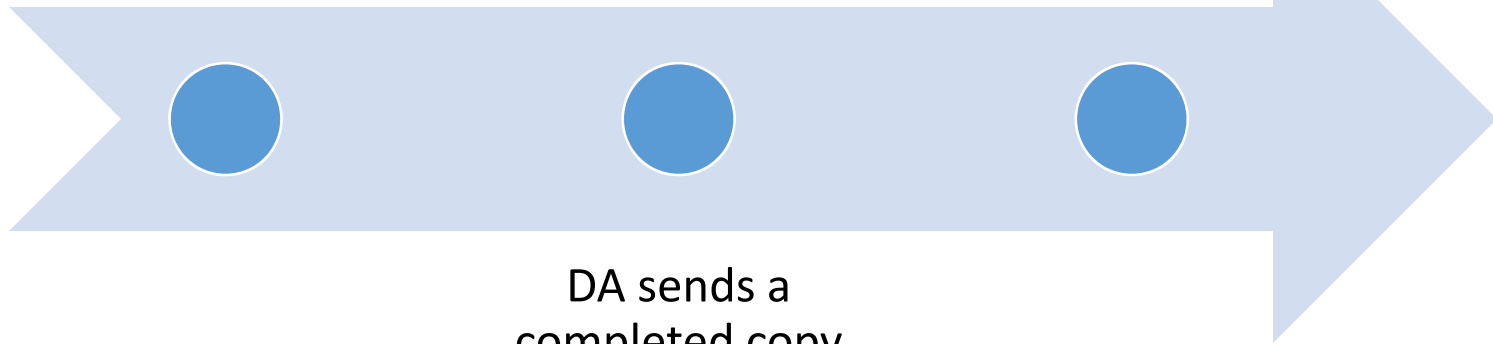


PROPOSAL SUBMISSION PROCESS

Pre-award
receives PTF.

OSP pre-award
reviews proposal
for compliance
with BC and
sponsor
regulations and
policies.

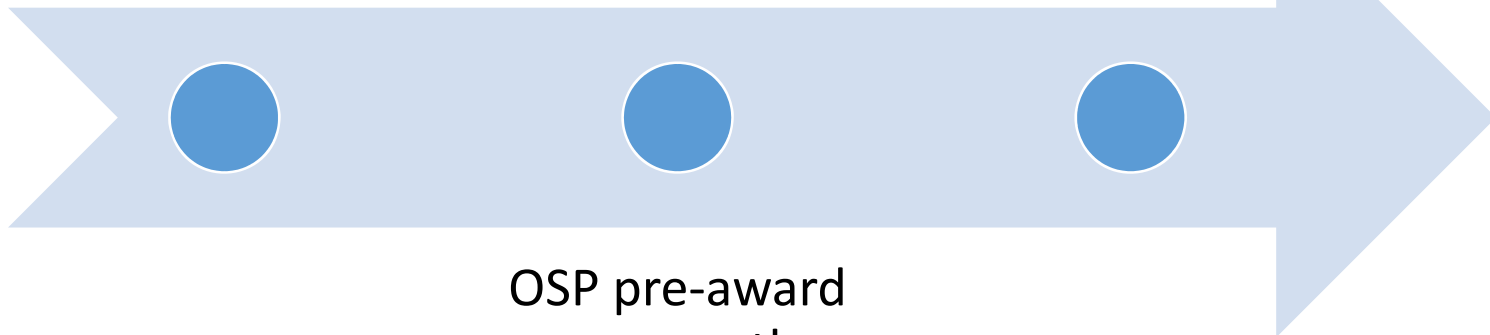
DA sends a
completed copy
of the proposal to
OSP 5 days prior
to deadline for
review.



PROPOSAL SUBMISSION PROCESS

OSP pre-award confirms information on PTF to match current version of the proposal.

Upon approval, the PTF is sent to the OSP Systems Analyst.



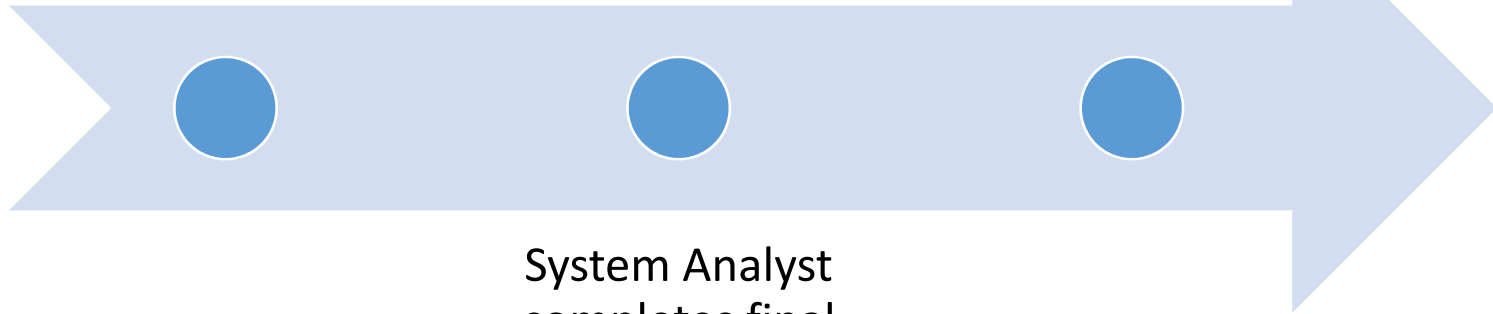
OSP pre-award approves the PTF.

PROPOSAL SUBMISSION PROCESS

System Analyst
completes final
review of data in
PTF.

System Analyst
transfers all non-
financial and rate
data to the
Proposal module.

System Analyst
completes final
approval of the
PTF.

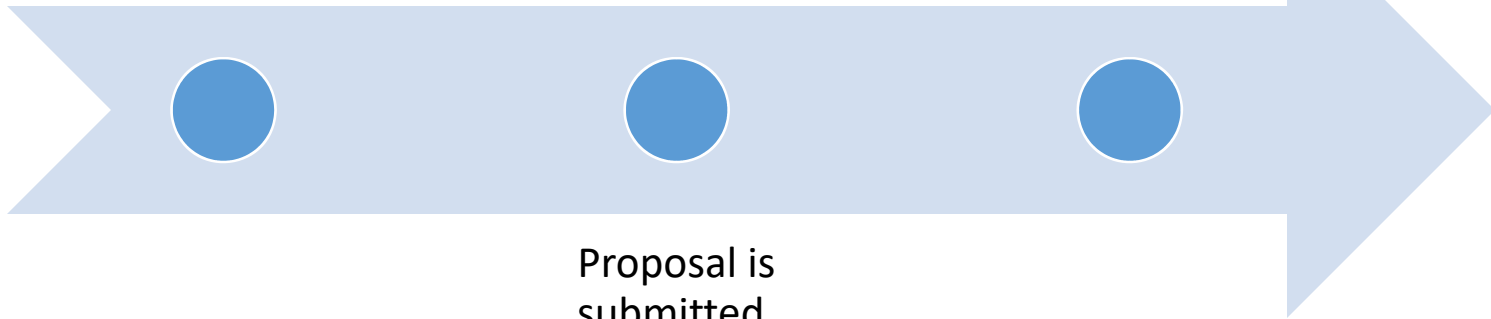


PROPOSAL SUBMISSION PROCESS

OSP pre-award
provides necessary
official signatures.

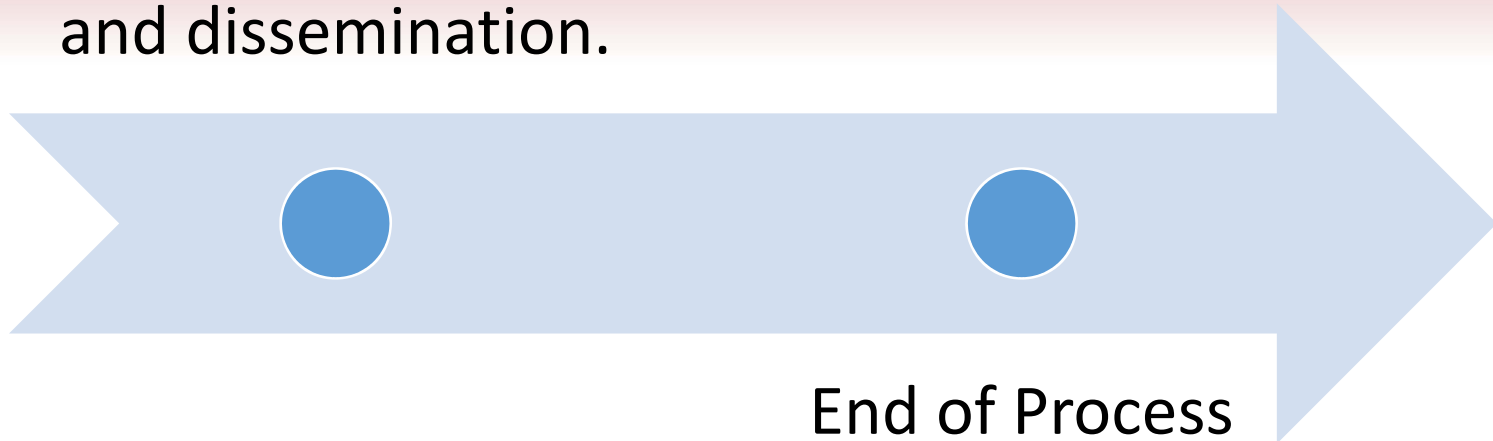
System Analyst
enters financial and
rate information and
changes proposal
status to submitted.

Proposal is
submitted.



PROPOSAL SUBMISSION PROCESS

OSP runs proposal management reports for analysis and dissemination.



OSP LEADERSHIP CONTACT INFORMATION:

Jennifer Lopez
Director, OSP

Email: jennifer.lopez@bc.edu

Phone: (617) 552-8259

Susan Hoban

Assoc. Director, OSP Pre & Post Award

Email: susan.hoban@bc.edu

Phone: (617) 552-3061

Fran Visconti

Assoc. Director, Financial Administration & Compliance

Email: fran.visconti@bc.edu

Phone: (617) 552-3398



OSP General Email Addresses: osp@bc.edu
ospadmin@bc.edu

QUESTIONS?

