



Welcome to the Tri-University Research Administration Conference.

Your session will begin shortly. While you wait, please review the following reminders::

Zoom Troubleshooting

Issues with Audio

Turn off headset/computer speakers and call in by phone for audio

General Issues

Log off and log back in using SSO

Technical Support

Call 480-965-9065 Ext 1.

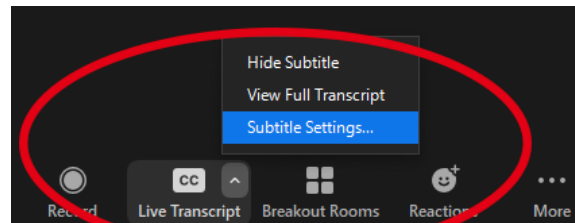
About this Session

Recording

Today's session is being recorded and will be made available for later viewing

Closed Captioning

The Closed Caption/Live Transcript feature has been enabled. You can show/hide the CC via your meetings controls located at the bottom of your screen.



We'd Love Your Feedback!

To help us plan next year's Tri-University Research Administration Conference, we would love to get your feedback.

If you want to provide feedback for the presenters of today's session, make sure to complete the survey you will receive via email at the end of the day.



Managing Large/ Complex/Strategic Proposals (aka the big \$\$\$)

Faye Farmer, Kim Patten, and Shana McClelland

Presenters



Faye Farmer
Executive Director
Research Development
Arizona State University



Kim Patten
Assistant Vice President
Research Development
University of Arizona



Shana McClelland
Manager, Training & Development
Sponsored Projects & Contracting
Services
University of Arizona



This session is by no means comprehensive. Mastering these large, complex proposals can take years of training and experience. In this session we'll cover some of the basics and provide you with information for additional learning and growth opportunities.

Session Objectives

- Learn how each institution defines large/complex/strategic proposals and identifying features of each
- Understand the different roles and responsibilities involved in managing large/complex/strategic proposals
- Learn key contacts at each institution that support large/complex/strategic proposal development
- Become familiar with professional development and growth opportunities in this area

Question and Answer Instructions

- Please enter your questions into the chat feature.
- We will answer as many questions as we are able at the end of the presentation.
- We will email all attendees with the questions and answers for any questions we are unable to answer during the session after the conference.

Defining Large/Complex/Strategic Proposals

Large/ Complex/ Strategic

Large

- Centers/Center-like proposals
- Program Operations/Administration proposals
- High Dollar (sometimes over \$10M, generally \$20M or more)
- Long Range (10+ years)


Complex

- Multiple Partners (academic, industry, other government, FFRDCs/National labs)
- Multiple Projects/Multiple Investigators (often at multiple institutions)
- Work Breakdown Structure (WBS) requirements

Strategic

- Aligns with the priorities of the institution
- May be requested/given priority by senior leadership

If you've ever worked on a large/complex/strategic proposal before, please enter in the chat one word or phrase that you would use to describe the experience.



Narrative Arc

Roles and Responsibilities



Post-Submission



Professional Development



Roles and Responsibilities

The Superhero PI



- Innovator
- Leader
- Strategic Thinker
- Collaborator
- History w/ Sponsored Research
- Ultimately: can make hard decisions

The Research Administrators



- Budget all the things!
- Help complete/obtain boiler-plate and technical components, signatures
- Navigate internal processes
- Ensure compliance with institutional, opportunity, and sponsor policies
- Help team to put all the pieces together in the correct places

The Research Development Professional



- Identify and match funding opportunities to researchers with specific expertise
- Provide objective, 10,000-foot level perspective to identify key players and stakeholders
- Establish and build relationships to facilitate development and growth of research collaborations
- Provide proposal management (w/ expertise in the technical narrative)
- Ensure progress, communication, continuous review and improvement of final product

The Program or Project Manager



- Planning, organizing, and directing the proposal process
- Timekeeper and Taskmaster
- Work with PI to assign roles and responsibilities
- Tracks and maintains current versions of documents
- Develops timelines and milestones

The Graphic Designer



- Informational tables, images and charts
- Logos and layouts
- Helps to inspire while informing through use of images, words and graphics
- Ties things together and makes them beautiful

Other Specialists as Needed



- Risk Management/Safety Professionals
- Research Compliance: Export Control, Human Subjects, Animal Care
- Human Resources/Hiring and Benefits Professionals
- Planning, Design & Construction
- Expert Reviewers (internal and external)
- Technical and/or Copy Editor



Depending on the resources your institution has available for any given project, you may not have all of these roles filled.

For instance, often, the Research Development Professional will perform much of the Program/Project Manager role.

You may be required to wear multiple hats!

Post Submission



Photo: Alex Guillaume via Unsplash

Submission is only the beginning...



- Response to Reviewer Comments
- Site Visits
- Reverse Site Visits (sometimes both!)
- Budget Revisions/Negotiations
- External Communications
- Award!

Response to Reviewer Comments



- Approach the response methodically
- You may receive a set of questions – if that's the case respond as concisely as you can
 - Assign a lead for each response
 - Talk through the initial plan
 - Talk through the responses
 - Review the text (and get fresh eyes)
- You may receive the panel summary – if that's the case, breakdown the summary into logical components and group comments
 - Identify the major issues and the minor issues
 - Respond to the major issues first
 - You may be able to group the minor ones
- Be gracious!

Site Visits & Reverse Site Visits



The Announcement & Award

- If you've won an award for a large center, you will likely receive notification prior to official release (the information will be embargoed and is used to plan for the launch of the award)
- Leverage your College/University Marketing, Communications, and Events teams
- If you were deeply involved, you may get looped in, otherwise just watch and learn



- Celebrate!

Key Contacts at Your Institution

Arizona State University

Research Administration Who can help me? >>

Search Search

Process Table of Contents Define Opportunity Develop Proposal Submit & Negotiate Setup Award Manage Subawards Execute Project Close Out

Home / Research Administration

Research Administration provides information, documents and tools to investigators and research advancement teams across the university.

The Process & Work Instructions help you to complete research administration tasks properly.

Click on process titles for more details >>

International Engagement and Collaboration *click here*

AT A GLANCE

PROPOSAL INFO AND RESOURCES

- Review a Funding Announcement Guide
- Standard Institutional Information
- Budget Building Information
- ERA Funding Proposal Guide

POST-AWARD RESOURCES

• Understanding Your Notice of Award

<https://researchadmin.asu.edu/>

ASU Arizona State University

ASU Home • My ASU • Colleges and Schools • Map and Locations • Directory | SIGN IN

Search

Research Development

Limited submissions Find funding Develop a proposal Events & networking About us

funding.asu.edu enables faculty, staff and students to find funding and develop more competitive proposals via the resources and services we promote.

ASU's Research Development manages the site, which provides resources that prepare faculty, staff and leaders to submit high-quality, highly competitive proposals. Our goal is to improve funding success and grow the research enterprise.

COVID-19 Related Funding Opportunities and Researcher Resources

Sign up to receive information on new opportunities and events sent via a single weekly email.

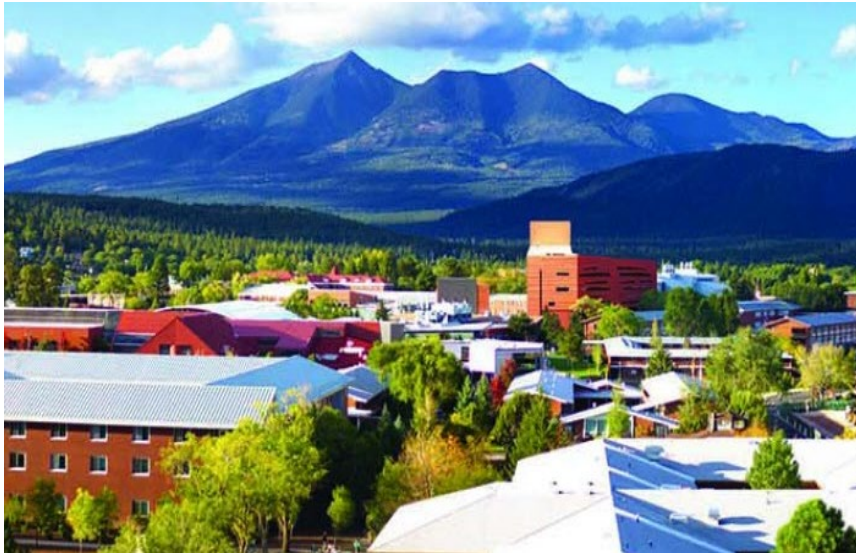
Sign up for weekly notifications

Recent announcements View all announcements

Events View all events

<https://funding.asu.edu>

Northern Arizona University Office of Sponsored Projects (OSP)



The Office of Sponsored Projects (OSP) is the university's centralized office responsible for authorizing extramural funding proposals submitted to sponsors, negotiating with sponsors, and accepting awards. It has the institutional responsibility for assuring the Arizona State Board of Regents (ABOR), the public, and the Federal government that the University has in-place systems and best practices for internal controls and fiscal accountability for sponsored project funds awarded to NAU.

Link:

<https://in.nau.edu/osp/>

Contact Info:

- Email: nau-osp@nau.edu
- Phone: (928) 523-4880

University of Arizona Research Development Services (RDS)

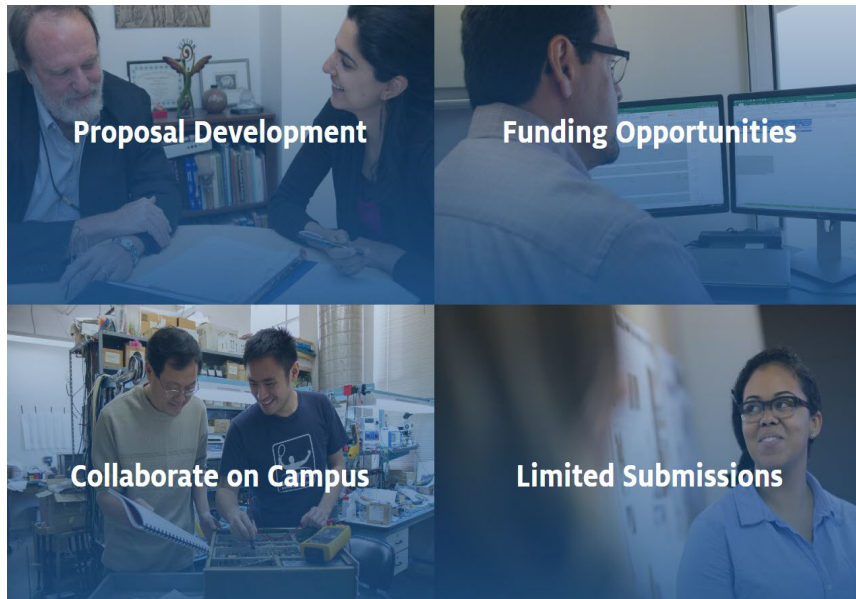
The Research Development Services (RDS) unit at the University of Arizona (UA) is an integral part of the suite of research services provided by Research, Innovation and Impact (RII). Our mission is to help UA researchers and scholars identify funding opportunities, form effective teams, and craft winning proposals, with the ultimate goal of increasing the quality and quantity of externally-funded research and scholarly activity at UA

Link:

<https://rgw.arizona.edu/development/rds-new-homepage>

Contact Info:

- Email: ResDev@email.arizona.edu
- Phone: (520) 621-8585



Professional Development

Certificate Programs

No expiration date, but if accredited, these must be maintained

- Participation
- Completion (some requirements, but no fail option if completed)
- Assessment based (curriculum with pass/fail)
- Apprenticeship (job training)

NCURA Research Development Certificate

Requirements: registration at annual conference

Application: none


Method: 6 of 11 sessions from certificate worksheet; remaining 5 are electives and can be from the certificate you are pursuing or from any other track; workshops do not apply

Fees: no additional fee

Preparation Resources: none

Additional notes: only available during the specific conference; cannot earn multiple certificates during the same conference

<https://www.ncura.edu/virtualannualmeeting/Education/CertificateProgram.aspx>



NCURA
Supporting Research...together™

62nd Annual Meeting A VIRTUAL EXPERIENCE
Research Development Certificate Worksheet
Workshops: August 7 & 10, 2020 | Conference: August 11–14, 2020

THE POWER OF YOU

Registrants of the conference can pick one certificate to earn. You cannot earn multiple certificates during the conference. There are 11 time slots during the conference. Participants must attend six sessions listed on their track worksheet. The remaining five sessions are considered electives and can be from the certificate you are pursuing or from any other track, including the NCURA Year Long Sponsor Sessions.

The following are titles that qualify for the Research Development Certificate. This worksheet will help you plan your schedule and record your sessions for submission online. The link to submit your sessions and request the certificate will open on August 3, 2020. Please submit your sessions by September 4, 2020 so that certificates can be sent on September 11.

Questions? Please contact Holly Anderson, Meetings Manager at anderson@ncura.edu.

TUESDAY | AUGUST 11, 2020

2:30 – 3:30 pm (EDT)

- DISCUSSION GROUP:** From Impactful Research to the \$: Show Me the Money!
- DISCUSSION GROUP:** Diversity & Inclusion to Further Your Plis' Research

4:00 – 5:00 PM (EDT)

- CONCURRENT SESSION:** Research Development Strategies from Around the Globe
- CONCURRENT SESSION:** International Collaboration, Security, and Compliance
- CONCURRENT SESSION:** Pre-Award Practices: Calibrating Your Sixth Sense
- CONCURRENT SESSION:** Controlled Unclassified Information
- DISCUSSION GROUP:** Pre-Award Essentials

WEDNESDAY | AUGUST 12, 2020

1:00 – 2:15 PM (EDT)

- CONCURRENT SESSION:** Research Development Strategies for Faculty at all Levels
- CONCURRENT SESSION:** The Research Administration Traineeship: The UCSF Program to Recruit and Train New Staff into Research Administration
- CONCURRENT SESSION:** Changing the Playbook of Research Administration at a PUI

2:30 – 3:30 PM (EDT)

- CONCURRENT SESSION:** Best Practices with Foundations: Building Relationships to Promote Effective Interactions
- CONCURRENT SESSION:** Horizon Europe and Collaboration Opportunities for Non-EU Institutions
- CONCURRENT SESSION:** Laying the Groundwork: Utilizing Internal Funding Programs for Future Success at PUIs
- DISCUSSION GROUP:** Staffing & Investment Considerations in Sponsored Projects Offices at PUIs

WEDNESDAY | AUGUST 12, 2020 continued

4:00 – 5:00 PM (EDT)

- DISCUSSION GROUP:** Lost in Translation: Bridging the Language Barrier in Cross-Country Research Agreements

THURSDAY | AUGUST 13, 2020

1:00 – 2:15 PM (EDT)

- CONCURRENT SESSION:** Putting the Puzzle Together: Building/Growing an Office of Research at a PUI
- DISCUSSION GROUP:** Go/No Go Decision Making for Proposal Submissions
- DISCUSSION GROUP:** Strategies for Effective Engagement Between Research Administrators and the University Advancement Team to Manage Foundation Proposals and Awards

2:30 – 3:30 PM (EDT)

- CONCURRENT SESSION:** The Latest Trends in Research Development: An International Perspective
- DISCUSSION GROUP:** Research Development vs. Proposal Development
- DISCUSSION GROUP:** Challenges and Pitfalls of Investigator Initiated Clinical Trials

4:00 – 5:00 PM (EDT)

- CONCURRENT SESSION:** Proposal Development: Helping Faculty with Content and Process Details
- CONCURRENT SESSION:** Improving Efficiency in Regulatory Operations and Compliance Through Strategic Initiatives

Please submit your sessions electronically to:
<https://www.surveymonkey.com/r/AM62ResDevCertificate>

SRA International Research Development Certificate

Requirements: full SRA International membership

Application: none

Method: 2 half-day workshops*, 4 required sessions (1 from each core content area), and 3 elective sessions

Fees: workshops are in addition to conference registration and costs vary by format and length

Preparation Resources: none

Additional notes: 3 years to achieve certificate (workshops and sessions offered at annual and regional conferences); can complete requirements from multiple certificates concurrently

<https://www.srainternational.org/meetings/certificate-programs/research-development>



⊖ Required Workshop

Must take both.

Fundamentals of Research Development

(half-day)

This workshop is intended for individuals with fewer than three years' experience in research administration or more experienced research administrators transitioning to research development. The workshop is designed to give newcomers to research development a big picture of the profession. Topics covered will include the role of the research development professional, how research development complements and differs from research administration, orienting investigators to the research environment and research development, overview of proposal development, and the agency review process.

Strategic Planning for Institutional and Individual Research Development

(half-day)

Effective research development programs need to incorporate best practices and respond and adapt to local institutional culture. This workshop will introduce participants to strategic planning for research development programs: what they are, types of effective infrastructures and staffing, tools, strategies and services for individual and institutional research development, and emerging trends in research development.

⊖ Required Sessions

Must take four.

Participants must complete four sessions, one from each core content area. Session titles vary from meeting to meeting.

1. Proposal Development: Overview and Proposal Components

This topic area covers the basics of proposal development and the role of the research development professional in identifying funding sources; interpreting application guidelines; coaching and assisting investigators in developing proposals.

2. Developing Investigator Capacity

This topic area covers educating and mentoring investigators in effective proposal development, establishing individual strategic funding plans, facilitating contact with funding agencies.

3. Collaborative and Large-Scale Projects

This area covers identifying and managing the development of large-scale, collaborative projects for research, outreach or education. Topics in this area include:

- identifying and forming teams,
- providing project management for proposal development,
- drafting non-technical proposal sections,
- coordinating multiple authors and providing editorial assistance for proposal narratives,
- organizing red team and external reviews,
- communicating with and coordinating external partners, and
- managing limited submission grant opportunities.

4. Research Development Management and Infrastructure

Sessions in this topic area include:

- professional growth and management for the research development specialist,
- identifying and training RD staff,
- coordinating RD across the institution,
- managing a hybrid position in research development and research administration,
- collaborating with other research administration offices and functions,
- managing limited submission proposals,
- managing internal grant programs,
- collecting and managing research development metrics,
- publicizing and
- recognizing research success, and other relevant topics.

Strategic & Competitive Intelligence Professionals

Requirements: none

Application: none

Method: completion of course, pass/fail exam

Fees: \$499 members/\$599 non-members

Preparation Resources: Study guide (free download)

Additional notes:

<https://www.scip.org/page/Market-Competitive-Intelligence-Training>

What You'll Learn How To Do

Be Grounded in Best Practice Strategies <ul style="list-style-type: none">Understand the Basics of MI/CIUnderstand Important Industry BenchmarksLearn 4 MI/CI Implementation Strategy Best Practices	Implement a Value-Driven Intake Process <ul style="list-style-type: none">Observe the 4 Laws of Project ManagementHear About 3 Scope-Creep MythsOutline a 6-Step Process for Diagnosing Requests
Build the Intelligence Capability <ul style="list-style-type: none">Apply the Intelligence Transformation FrameworkDiscover the 3 Components of Your MI/CI Function RoadmapDevelop an Intelligence Capability Business Model	Manage Stakeholder Expectations <ul style="list-style-type: none">How to Set Clear ExpectationsIdentify the 5 Critical Ways to Manage ExpectationsReceive Action Steps to Successfully Manage Stakeholders
Conduct Primary Research <ul style="list-style-type: none">Tips to Improve Secondary Source SearchesConsider Ethical GuidelinesUnderstand Primary Research Elicitation Techniques	Create an Early Warning System <ul style="list-style-type: none">Learn the 4 Steps to Develop a SEW ProgramObtain Practical Tips to Mobilize an SEW CapabilityUnderstand How to Leverage Indicators Analysis
Develop an Intelligence Network <ul style="list-style-type: none">Understand Importance of Internal & External NetworksHear a 4-Step Process to Build NetworksHow to Keep the Process Sustainable and Evergreen	Demonstrate the Value of CI <ul style="list-style-type: none">Learn the 4 Core Elements to Demonstrate ValueIdentify Potential Metrics to Show ValueEstablish an Action Plan to implement the Return on Competitive Intelligence (ROCI®) Framework <small>ROCI® is a registered trademark of Proactive Worldwide, Inc.</small>
Deliver Impact through Analysis <ul style="list-style-type: none">Learn About the 7 Hallmarks of Successful AnalysisHear About 4-5 Critical Analytical FrameworksProvide a Compelling Reader Experience	BONUS: 3-4 weeks post-workshop Implementation Support Q&A Session <ul style="list-style-type: none">Working session to address questions and challenges encountered by participantsSharing of lessons learned



Certification of Strategic Doing™

Requirements: none

Application: none

Method: 2.5 day training workshop + 1 course + demonstration of skill

Fees: \$495-589; recertify every 2 years

Preparation Resources: online events (\$)

Additional notes:

<https://strategicdoing.net/strategic-doing-in-your-organization/guidance/training-certification-strategic/>



Strategy is really about answering two questions: *Where are we going?* and *How will we get there?* Many strategic plans don't answer one or the other of those two questions – either they don't have sense of the direction in which the organization is going, or there's plenty of vague language but nothing about implementation on those visions.

The two questions are simple, but we've found they don't give quite enough guidance for an organization to do things differently. To respond to that need, we've found that breaking each of the two questions in half – so that there are four questions – provides the needed structure:

- What could we do? What are all the possible opportunities before us, based on the resources that we currently have, that would help us move toward the future we'd like to see?
- What should we do? We can't do everything – which opportunities, out of all the possibilities, should we pursue right now?
- What will we do? What commitments are we going to make to one another to start pursuing that opportunity that we've identified as the best one?
- What's our 30/30? When are we going to get back together (usually about 30 days from now) to talk about what we've learned, to adjust our direction based on those lessons if needed, and to set our course for the next 30 days?

These four questions form a loop in which groups plan, do, reflect on that doing, and then make their next plans.

The 10 Rules go a step further – they provide the skills that are underneath, guiding the conversation to help groups effectively answer the questions. Want to learn more? Join us at [Strategic Doing 301: Leading Complex Collaborations](#) – held throughout the year in multiple locations.



Strategic Doing™
Do More Together.

Univ. of Chicago Graham School Editing Certificate

Requirements: bachelor's degree

Application: required

Method: 5 multi-week classes (online or combination of online and in-person); 4 required and 1 elective; can be completed within one year

Fees: \$1,150 per course (10% discount for ACES members)

Preparation Resources: none

Additional notes:

<https://grahamschool.uchicago.edu/academic-programs/professional-development/editing/curriculum#edcourses>

What do Editing Students Learn?

- Describe and manage the publishing process and the role and responsibility of the copy editor
- Use *The Chicago Manual of Style* as an editing tool
- Develop strategies for approaching an editing or proofing project

4 CORE COURSES

1 ELECTIVE



Editing Program Structure

The Editing certificate is a sequential program. Course competencies must be met in a specific order to best support your professional development in editing.

Upon admittance, students will be invited to a program on-boarding to learn about certificate requirements and discuss course selection based on professional development goals and preferred timeframe for completion.

Students interested in taking advantage of the one course completion without declaring their intention of pursuing the Editing certificate have a selection of two courses:

- Core course: **Basic Manuscript Editing** - EDIT11100
- Elective course: **Essentials of Grammar for Professionals** - EDIT21400

Upon completion of one of these two courses, students interested in pursuing the Editing certificate will need to **submit the program application** to continue taking courses towards program completion.

- 4 required courses and 1 elective course
- Class sizes range from 10-20 students per course
- Students can complete the certificate in as little as 3 quarters
- Classes may be taken online or in-person in downtown Chicago



THE UNIVERSITY OF CHICAGO
GRAHAM SCHOOL
CONTINUING LIBERAL AND PROFESSIONAL STUDIES

Certification Programs

Independent competency using assessment, based on a job/knowledge/practice analysis, representative of the population

- Job/knowledge analysis informs the test
- Recertification/maintenance
- Code of conduct or behavior
- Can be revoked

APMP Foundation/ Practitioner/ Professional



Requirements: Foundation 1-3 years experience; Practitioner 3-7 years experience; Professional 7+ years experience

Application: register for/book exam

Method: Foundation 1 hour exam, open book, multiple-choice, 75 questions, pass/fail; Practitioner assessment through essay questions (no time limit); Professional assessment of impact, presentation, leadership skills, and communication in an interview setting;

Fees: \$400-850

Preparation Resources: Body of Knowledge, study guides, training (\$)

Link: <https://www.apmp.org/>

Editor of Life Sciences

Requirements: bachelor's degree or equivalent + 2 years experience as manuscript editor in life sciences

Application: application form; resume; 3 letters from employers; transcripts; application fee

Method: certification exam

Fees: \$65 application fee; \$250 examination fee

Preparation Resources: Study guide (free download)

Link:

<https://www.bels.org>

Grant Professional Certification

Requirements: two pathways dependent upon level of education; points-based assessment (120 points needed of 170 possible for both)

Application: eligibility packet

Method: multiple choice exam and writing exam

Fees: \$639 members/\$875 non-members

Preparation Resources: detail of required competencies and skills, literature review, past GPA study group materials (\$), others

Link:

<https://www.grantcredential.org/>

Certified™ Professional Facilitator

Requirements: 6 core competencies, multiple level on experience, IAF membership

Application: 3 parts – candidate information, career resume, statement of qualifications/experience

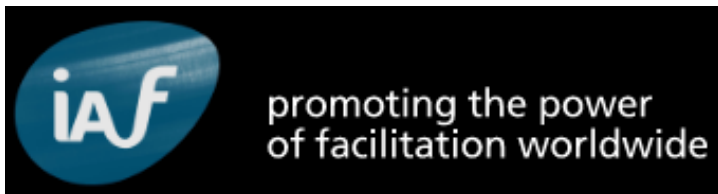
Method: 2 stages – Stage 1 Assessment (application and documentation), Stage 2 Assessment (interviews and workshop facilitation and participation; online and face-to-face)

Fees: \$2,500 certification fee

Preparation Resources: experience

Link:

<https://www.iaf-world.org/site/pages/becoming-iaf-certified%E2%84%A2>



Certified Grants Management Specialist



Requirements: bachelor's + 3 years experience (in last 10 years) or no degree + 5 years experience (in last 10 years)

Application: online application

Method: certification exam

Fees: \$500 member/\$674 non-member (includes 1-year membership to NGMA)

Preparation Resources: Body of Knowledge, study buddy social community, online practice test (\$)

Link:

<https://www.ngma.org/cgms>

Project Management

Requirements: bachelor's + 3 years + 35 hours experience; associates + 5 years + 35 hours experience

Application: online application

Method: certification exam

Fees: \$405 member/\$555 non-member

Preparation Resources: Body of Knowledge, review sessions (\$), online practice test

Link:

<https://www.pmi.org/certifications/process>



Certified
Pre-Award
Research
Administrator
or
Certified
Research
Administrator



Requirements: BOTH: bachelor's + 3 years experience or associate's + 5 years experience or no degree + 6 years experience;

Application: online application; 2 letters of reference

Method: certification exam

Fees: \$395 exam fee

Preparation Resources: Body of Knowledge, review sessions (\$), online practice test (\$)

Link:

<https://cra-cert.org/>

Words of Wisdom
(from those who have been there!)

Faye's Top Tips for Success



Tao Te Ching - Lao Tzu - chapter 11

Thirty spokes share the wheel's hub;
It is the center hole that makes it useful.
Shape clay into a vessel;
It is the space within that makes it useful.
Cut doors and windows for a room;
It is the holes which make it useful.
Therefore profit comes from what is there;
Usefulness from what is not there.

<https://www.wussu.com/laotzu/laotzu11.html>

Kim's Top Tips for Success



No man is an island...

- Give yourself enough time (and forgive yourself and be grateful to others when it's a quick turn-around proposal)
- Make sure you have strong go/no-go decision points (and be OK with saying "no-go"!)
- Ask for, and willingly accept/receive, help! Use all available institutional resources you can muster (you may even need to find external help)

Shana's Top Tips for Success



Details matter.

- Read the solicitation. Then read it again! Highlight/ bookmark important sections and language (must, will, should) and make sure someone on the team is covering each item!
- Communicate with your submission team (central sponsored projects office?) early and often. Let them know your plan, your timeline, and work with them to identify options for delays, errors, etc.
- After months of looking at the same project, it's easy to skim past little mistakes/errors. Get a fresh set of eyes once things are mostly buttoned down to help identify items for clean-up.

Tri-University

Research
Administration
Conference



Questions?

- Faye Farmer, ASU, faye.farmer@asu.edu
- Kim Patten, UA, kjpatten@arizona.edu
- Shana McClelland, UA, shana@arizona.edu

Tri-University

Research
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Thank you for attending!

- Please don't forget to complete the session survey to let us know how we did.
- You will receive a single Qualtrics survey this evening for all Day 2 sessions.
- The survey will be open until Sunday at 11:59pm and then will automatically close and record any partial responses.