

Research Administration: A New Opportunity for Grants Management



RAMC: September 2, 2020



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Welcome Back RAMC!

Research Administration Modernization Committee



Poll



Agenda

- Refresher – Why are we doing this?
- Challenges/Mitigations & Current Status
- Unfunded Agreements
- Progress Since May
- What's Next?
- Questions/Answers



The University of Rochester is one of the country's top-tier research universities, submitting close to 1,700 grant applications and receiving over \$410 million in grant funding in fiscal year 2019.

This critical funding aligns the needs of our community with the mission of our university to request investments in positive change.

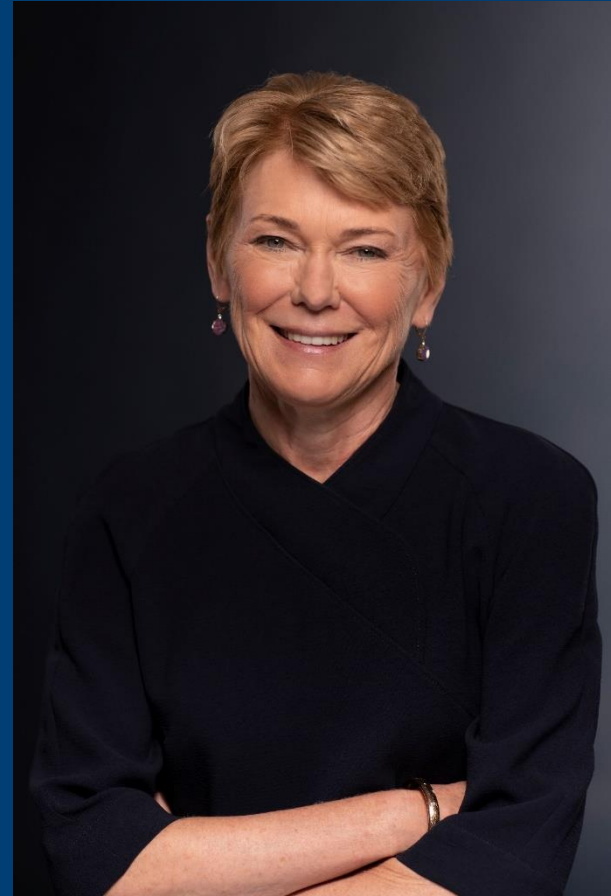


Research: A Priority

“The environment of a great research university creates great opportunity – not just in the learning itself, but how that learning translates into understanding and action.”

*As president, I will focus on supporting and sustaining **research** at every level. Because it is through the knowledge derived from research that we fulfill our mission to make the world ever better.”*

- Sarah Mangelsdorf, President, University of Rochester, Inaugural Address



There are Challenges



1. Widespread **manual entry** and, at times, duplication of effort within research systems to capture, verify, and accurately report on data.
2. Multiple systems and processes are used across the university to accomplish similar functions, resulting in a **lack of consistency** across departments and colleges.
3. Many research systems do not adequately mirror business processes or contain needed functionality, which is currently mitigated by use of **paper forms and routing**.
4. Inability to see the “whole picture.”
5. IT support for many research systems is spread thin or ‘single-threaded,’ creating **risk in continuing operations and future UR growth**.



If we do not make a change and modernize our systems and automate our processes, the opportunities for funding, growth and positive impact will be **limited.**



Imagine the possibilities...



*...with
streamlined
processes,
automated
workflows,
integrated
systems and
more **TIME** to
make a positive
impact on the
community.*



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Challenges/Mitigations & Current Status



Challenges

- COVID-19, remote work environments, and furloughs introduce additional complexity with planning, change management, efficiency, and overall project management
- Huron recently shared a roadmap that would have required UR to upgrade shortly after go-live.
- Huron eRA products need to be on a “common” version in order to have a fully integrated experience (IRB, Grants, Agreements)
- The ORPA office recognizes benefits from being able to use the Agreement product while working remote



Mitigation Plans

- Moved forward with IRB Upgrade (9.1) in June
- Moved the Agreement module (9.1) go-live up to September 2020 for **unfunded** agreements
- Moved the Grants module go-live date out to January 2021
 - Take advantage of functionality that we would have paid to have customized
 - A full year after go-live without needing an upgrade

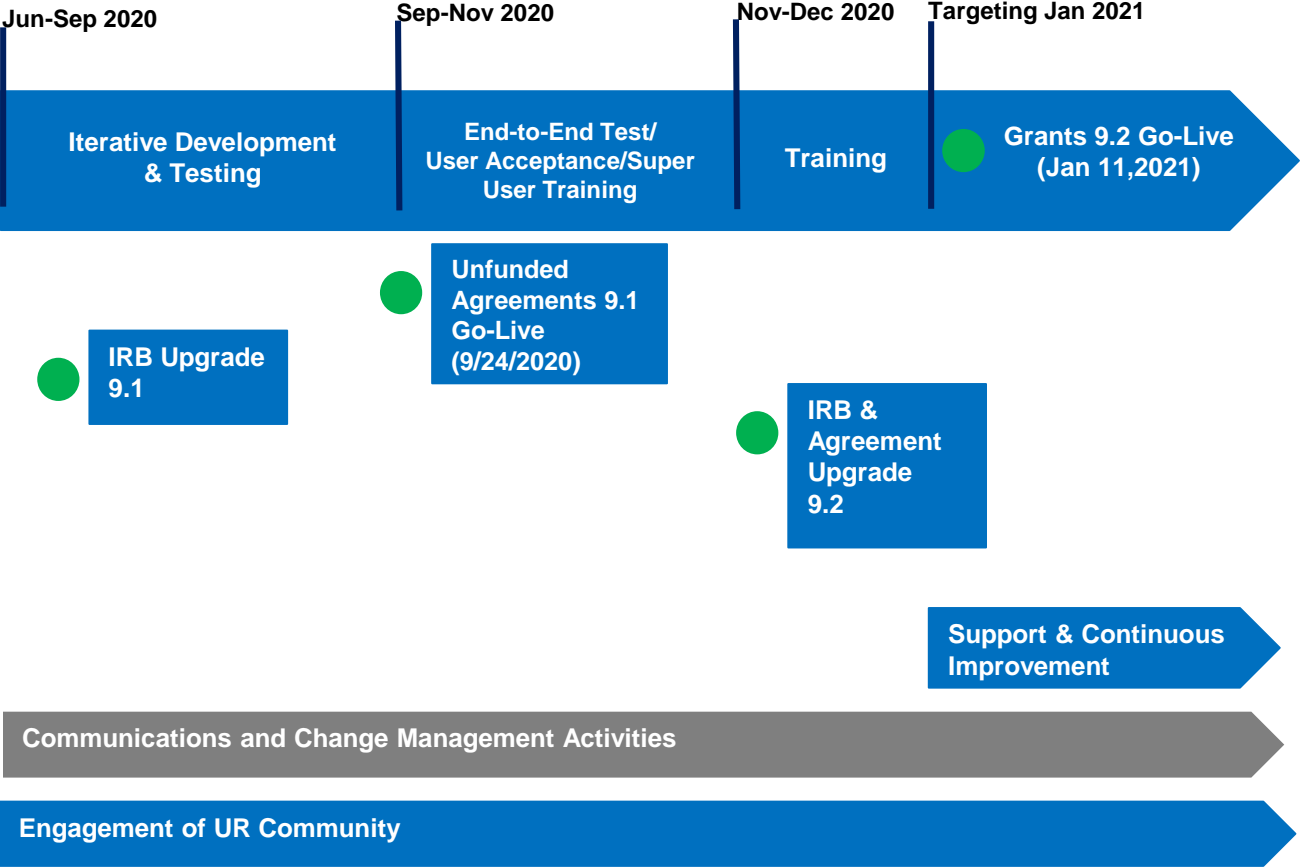


Unfunded Agreements

- Moving from Inteum to IORA
- Currently testing Agreements module
- Email catcher feature
- Compiling training documentation & resources
- You helped us identify a select group of users for testing/training
- Training will occur September 10 and 17



Timeline: **IORA** Grants & Unfunded Agreements Implementation



Progress Since May



Progress Since May

- Data migration from COEUS to IORA is progressing
- Data clean-up work around sponsors (hierarchy, addresses, etc.) continues
- Meetings held to discuss Sponsor hierarchy and where organizations will eventually be sourced
- Completed posting of pre-requisite videos in an MyPath eLearning module as well as salary attestation (Code of Conduct) acknowledgement
- Successfully upgraded IRB
- Communicated new approach/schedule with RAMC, Super Users and Advisory Committee
- Plan is that only CLASP-certified individuals may author proposals



Next Steps

- Meeting with super users weekly beginning September 9
- Finalizing business processes including:
 - Advance Account Requests
 - Issuing Sub-Awards
- Continue creating training documentation for Grants module
- Testing 9.2 upgrade and proof-of-concepts
- Faculty engagement



We need you!



You play a critical role in success and change!



Share your ideas with us.



Stay involved & informed. We will reconvene again in October.



Communicate with your colleagues, faculty and us!



Recognize this is a big change and will take time to adjust.



IORA Project Website: rochester.edu/iora-project/grants/

Email the team: iora@Rochester.edu

Invite us to your department meetings!



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Questions?

