Research Administration Advisory Council (RAAC)

Committee-at-Large

Tuesday, March 17, 2015, 3:00 – 4:30 pm

School of Information
North Quad
105 State Street
Ehrlicher Room (3100)

MINUTES

Introductions of Members and Guests (Daryl Weinert)
Daryl called the meeting to order at 3:02.
Daryl: Thank you to Becky and the School of Information for hosting today.

Update: RAAC Training Subcommittee (Mindy LaRocca)
Power Point slides are attached to these minutes

Mindy: Update on current Subcommittee members. We have increased membership on the Subcommittee.

RAMP update: The pilot cohort launched in October 2014 with two orientations, one in October and one in November. Mentors were matched with mentees.

Mid-point evaluations were sent out in January 2015 and due at the end of February. The pilot cohort was introduced at the February RAN Meeting. The advisory subcommittee met in March and analyzed the evaluations. 90% of the feedback was positive. We have some minor things to tweak. For instance, we will revise the applications and evaluations and put them in a Google Forms format. We will also add a mid-point meeting (in addition to having mentors and mentees discuss the issues they’ve encountered at the midpoint meeting, we will also have a brownbag luncheon at the meeting, where participants can listen to a past participant or someone from campus speak). We might also include a brownbag luncheon for mentors to present topics they are expert on to mentees.

It might be helpful to match mentors to mentees within the same, larger schools and colleges (it was harder for pairs to come up with topics to discuss). We will also take expertise and job duties into consideration for future matches.
Some mentors asked for a sample outline for their 1:1 meetings so they would have suggested topics to discuss. A RAMP Google site was requested for communication among the members. (there is currently a RAMP Google Group).

The size of the cohort (20 matched pairs) seemed to work well. The pilot group will meet three-four more months. July 2015 will be the end of the pilot.

Research Administration Training for Newcomers: A taskforce completed a recommendation of 204 learning objectives for new RAs. In January 2015, a full proposal was submitted for budget approval through Finance. HRD will work with us to develop this training. HRD has suggested the objectives be broken down into three pots: In person training, job aides, and online training. HRD will engage subject matter experts for assistance as needed.

Existing RA Training review and refresh—a work group has been established to review the content of Introduction to Sponsored Projects Admin and Introduction to Budgets. Amanda Coulter is leading this group. Once the recommendations are presented, the plan is to roll it out as soon as possible. The next step will be assembling a new work group to work on Introduction to Budgets.

Future tasks: RAIN 2.0. Advanced Training for RAs—Brainstorming has been done with the Subcommittee members. We are considering certification tracks such as pre-award, post-award, and clinical trials. Currently, this is on the back burner while we focus on our three main works in progress. Once moving forward, we will reach out to the RA community to request additional assistance to work on the development.

As Needed Training: A task for future development to respond to things like Uniform Guidance, budget reallocation tool, sponsor specific training, etc.

NCURA and SRA Traveling Workshops (fundamentals sessions) –We are in discussions regarding bringing NCURA and SRA here to U-M to present to eliminate the need for and cost of travel.

Peggy asked: How apt are we to have sponsor specific training?
Amanda: We’ve heard many times at discussion tables at RAN meetings that people would really like sponsor specific training. We could make our customers very happy if we can make it happen.

Daryl: Debbie, Amanda, Mindy and the Subcommittee have been thinking about how we can develop a training foundation more broadly. Working with HRD is the only realistic way to get it going by fall, and this will also address how to develop tools. We really need a professionalized training group. HRD is helping to (1) define priorities, (2) figure out what sort of training professionals we need to best address our training needs, and (3) get a budget developed for this. This should be in place by January 2016.

Linda asked: Will you send a message to the RAAC group to solicit volunteers for the Intro to Budgets task group?
Mindy: Sure.

Daryl: Compliments to the Subcommittee—when we submitted our bid to HRD, they were incredibly impressed by the information we were able to give them and the work that had been
done. This is a testament to the leadership of the Subcommittee (both previous and current). Thank you to all on the Training Subcommittee.

Mindy: I’m curious to see if mentors will return? Will we get as many applicants for mentees this time? Will current mentors and mentees continue to work together? The feedback is that many will continue their relationship on an informal basis.

The next round of applications will go out in July, hopefully.

**Preview: Pre-launch of the Research Websites** *(Constance Colthorp, Lori Deromedi, Alex Piazza and David Lampe)*

*Power Point slides are attached to these minutes*

Daryl: We wanted to update everyone on the state of the website. They are very busy in the building phase right now. Three research websites are launching, under the leadership of David Lampe.

David: A couple of years ago, we realized that we had a 1950s website, if there was such a thing then. We decided we wanted to create an entirely new website with two functions: Capture the value and excitement of research and let people know the central research support available.

There are five broad categories developed for the websites:

1. Research at UM—mission and goals.
2. Resources for Researchers—funding, policies and procedures, research administration, facilities, services, ethics and compliance, expertise database.
3. News & Issues—how does research impact society focus? University of Michigan research, University news, Health system news, working with the schools and colleges to develop stories.
5. Major Initiatives—continually developing, planet blue, society 2030. Economic Engagement—research impacting the state and the world. IRLEE, Fast Forward Medical Innovations, Innovate Blue, OTT.

Constance: On the ORSP website—the Project Lifecycle will help people navigate the process. Key tools on each page—Lookup Sponsor Assignment; staff landing pages; links to UMOR and Ethics/Compliance websites; at the bottom of each page there are FAQs, References, Resources and Links, Other Resources; At the top of the page is a “jump to” to each of the various offices (UMOR, Ethics and Compliance, Finance, Sponsored Programs, etc.)

Lori: Ethics and Compliance information on the current website is all over the place. This is our effort to put into one place the eight programs that UMOR administers. This is the place to go for policies on anything related to research ethics and compliance. Links to each of the eight UMOR programs. Animal Use and Care, Human Subjects, Pluripotent Stem Cells, Research Safety, Research Integrity, Conflict of Interest, Controlled Substances, and Export Controls. There is always a heading for Research Roles & Responsibilities at the bottom of the page. Also at the bottom, there is a Questions section for contact information for experts. There are menus for pages that have heavy information, and there are training links on the front page of each program.

Linda asked: When do you plan to launch this?
Constance: It will be an ongoing launch March 30-April 13.

Daryl asked: Can you talk a little bit about what you are doing to make sure the site stays fresh? Constance: We have a style guide, we have a page inventory, we have a Content Management System.

Peggy asked: If I Google something, sometimes it will take me to an old page. Will this eliminate this? Constance: we will have “301 redirects” in place. You may get dead links; we will submit XML links to Google.

**Update: ITS (Cathy Handyside)**
Briefly, we are in the midst of upgrading the underlying framework of eRPM. This is extremely hard work. We are moving all eResearch systems to this new framework. The upgrade will be at the end of April, beginning of May. What that means for right now is we are unable to do any enhancements, but we will be able to go back to that after the upgrade. The next scheduled release is in June, and we will then be back on schedule for every two months.

**Update: Sponsored Programs (Debbie Talley)**
Two Sponsored Programs staff are moving to Shared Services as of April 20. We are currently conducting the NSF audit, which is a data analytics audit. This audit covers three years, about 1400 projects, October 2011 through September 2014. We should hear in the next few weeks what transactions they have selected.

A133 is due March 31; this is an annual federal government audit.

There will be a customer service survey related to any organization within Business and Finance. Sponsored Programs has extra specific questions on the survey.

We’ve been notified by the Department of Defense about spending money. It’s important that people are spending DOD grants and spending them in a timely manner. There will be a note in the RAPid regarding this soon.

Bryan: Eliminating the risk for the eVerify process. There will be a monthly report from HR Records Office for follow-up for people who have yet to be eVerified. Bryan’s staff has people who will contact departments to reach out to see what they can do to get people eVerified.

Debbie: We’ve been talking to RAAC about this situation; do you think we should also go to the BAG? Cathy S-O: eVerify needs to synthesize HR with budget administration.
Linda: It would be good to put it on departments’ radar.
Debbie: There still is a Lean Project looking at the whole eVerify process.
Cathy S-O and Craig: There is a list of data in the data warehouse that could be useful. Query of shortcodes.

**Update: ORSP (Daryl Weinert, Craig Reynolds)**
We are in the midst of a search for a director. This is a national search. We’ve narrowed the field to four finalists. Candidates will be coming in for interviews. The motivating factor is Jack has asked Daryl to take on additional duties, including spearheading an effort for UMOR regarding reducing administrative burden on staff and faculty.
Finally, a few of us having been working extensively with the provost, including Jack Hu and Nancy Hobbs, and others, taking a really deep dive on the Volume of Research and what constitutes research. A taskforce has been appointed—Daryl and Cheryl Soper are co-chairing the task force. We will be coming to your units for further data gathering. It really pertains to defining research as well. It may be that research is constituted differently in different schools and colleges, legitimately. James Gorman will be the Project Manager of the task force.

Craig: Institutionally we have agreed to use the Accelerate Clinical Trial Agreement. This was put together in partnership with the national CTSAs, plus UIDP and some major players of the pharmaceutical industry. There will be a template agreement applicable to sponsor initiated clinical trials only. We can offer them turnaround time of one day if they agree to use the template.

ORSP is putting the final touches on our Continuity of Operations disaster plan. If the Wolverine Tower gets hit by a tornado or some other disaster, we need a plan to be able to continue our work. We are reaching out to select units to partner together to get proposals submitted.

RAAC Metrics Survey—survey 2.0—please respond so we have good feedback.

Uniform Guidance takeaway: July 1, 2015 is the effective date for the UG as far as UM is concerned. Doug Strong and Jack Hu have blessed this date. One caveat is the Procurement requirements will be delayed until July 2016. We will be working with RAAC and Amanda to get this information out. We want to understand as best we can what agency implementation plans are, then work with you in the month of May regarding what process changes will be happening, and finally roll out in June with town halls, newsletters, RAAC outreach, RADS, BAG, etc. More info coming! Notices were in the September and December newsletters from ORSP and Sponsored Programs. This is really as much information as we have, but we will fine tune as we go.

**Closing and Future Meetings (Daryl Weinert)**
If you have ideas for topics for these meetings please let Daryl, Debbie or Yvonne know.

Thank you to Becky and the School Of Information for hosting us.

The meeting was adjourned at 4:26pm.

Minutes submitted by Lisa Kiel.
RAAC Committee-At-Large Meeting Dates

- Tuesday, April 21, 2015, 3:00 – 4:30 pm (School of Literature, Science, and the Arts)
- Tuesday, May 19, 2015, 3:00 – 4:30 pm (Ross School of Business—old Wiley Bldg.)
- ***NO MEETING IN JUNE***
- Tuesday, July 21, 2015, 3:00 – 4:30 PM (TBD)
- ***NO MEETING IN AUGUST***

RAAC Executive Committee Meeting Dates (meetings held in Conference Room 1025, Wolverine Tower)

- Tuesday, April 14, 2015, 3:30 – 5:00 pm
- Tuesday, May 12, 2015, 3:30 – 5:00 pm
- Tuesday, June 9, 2015, 3:30 – 5:00 pm
- Tuesday, July 14, 2015, 3:30 – 5:00 pm
- ***NO MEETING IN AUGUST***
Research Administration Advisory Council
Training Subcommittee

Update to RAAC committee-at-large, March 17, 2015
Mindy LaRocca, Chair
Agenda

● Update on Committee Membership

● Ongoing Projects

  - Research Administration Mentoring Program - RAMP↑
  - RA Training for Newcomers
  - Existing RA Training Review and Refresh

● Future Projects

  - Advanced RA Training (RAIN 2.0)
  - Pop up training as needed
  - Traveling NCURA/SRA Workshops
### Current Subcommittee Membership

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<tr>
<td>Judy Carrillo</td>
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<td>Amanda Coulter</td>
<td>ORSP/Sponsored Programs</td>
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<td>Lori Deromedi</td>
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<td>Michele Feldkamp</td>
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<td>Melinda LaRocca</td>
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<td>Cathy Seay-Ostrowski</td>
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<td>Susan Powell</td>
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<td>Sharyn Sivyer</td>
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<td>Gary Smith</td>
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<td>Yvonne Sturt</td>
<td>ORSP/Sponsored Programs</td>
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<td>Lea Tune</td>
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<td>Pat Turnbull</td>
<td>U-M Dearborn</td>
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<td>Lana Tyrrell</td>
<td>ULAM/Medical School</td>
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Research Administration
Mentoring Program RAMP

- Pilot cohort launched in October 2014; in progress, approximately mid-way through

- Midpoint evaluations were sent to participants January 19th and were due back by February 20th

- Pilot cohort was introduced at the February 2015 RAN meeting!

- Advisory Committee met on March 2nd and analyzed evaluation feedback on how to improve the program.

- Mentors/Mentees will meet approximately 3 more months and submit their final evaluations that will also be reviewed by the Advisory Committee

- Final “end-of-cycle celebration” July 2015

- Lisa Rabaut, RAMP Program Coordinator, last day Friday, Mar 20th
RA Training for Newcomers

• Oct 2014 framework and recommendation completed with 204 learning objectives for new RAs

• Jan 2015 full proposal submitted for budget approval through Finance

• Tony Burger, Director of Financial Analysis and Doug Strong, Interim Executive Vice President and Chief Financial Officer, requested we send to HRD to determine what they would charge to create the new RA training

• HRD submitted their proposal to Debbie Talley and Daryl Weinert at the end of February.

• HRD tentatively scheduled to begin designing Mid-March.
RA Training for Newcomers (cont.)

• HRD will lead an effort to review all 204 objectives and divide them into three separate categories (depending on the suggested delivery method):
  - In person training
  - Job aides
  - Online training

• HRD will engage Subject Matter Experts (SMEs) for assistance as-needed.
Existing RA Training Review and Refresh

- A work group has been established to review the content of two previous stand-alone workshops:
  - Introduction to Sponsored Projects Administration
  - Introduction to Budgets

- “eResearch Proposal Preparation and Unit Review” course has been offered monthly since last Fall, taught by Tina Young (ITS)
Existing RA Training Review and Refresh (cont.)

- Currently, this group is completing their review and recommendations for the “Introduction to Sponsored Projects” workshop

- Goal: review and refresh the (old) course content to bring training basics to research administrators before the new training is ready

- The work group will present their recommendation at our next subcommittee meeting with the intent of rolling out as soon as possible.

- Next: We are currently assembling a new work group to review and make recommendations for “Intro to Budgets.”
RAIN 2.0 - Advanced Training for RA’s

- Brainstorming phase with the subcommittee members
- Considering certification tracks such as pre-award, post-award, clinical trials
- We have currently put this on the back burner while we focus on our three main works in progress.
- Once we move forward, we will most likely reach out to the entire RA community to get additional volunteers to work on the development.
As Needed Training

- Training that may arise from new guidelines, new systems, system enhancements, etc.
  - Uniform Guidance
  - Budget reallocation tool

- Sponsor specific training?
NCURA/SRA Traveling Workshops

Very early stages of reviewing the “fundamentals” sessions of NCURA.

- [http://www.ncura.edu/Education/TravelingWorkshops.aspx](http://www.ncura.edu/Education/TravelingWorkshops.aspx)
- [http://www.ncura.edu/Education/TravelingWorkshops/LevelIFundamentalsofSponsoredProjectAdministrationFund20.aspx](http://www.ncura.edu/Education/TravelingWorkshops/LevelIFundamentalsofSponsoredProjectAdministrationFund20.aspx)
- [http://www.ncura.edu/Education/TravelingWorkshops/LevelIFundamentalsofSponsoredProjectAdministration.aspx](http://www.ncura.edu/Education/TravelingWorkshops/LevelIFundamentalsofSponsoredProjectAdministration.aspx)
Questions?
15 Things to Preview on the Research Websites
5 Things to Preview on the U-M Office of Research Site

1. Research at U-M
2. Resources for Researchers
3. News & Issues
4. Major Initiatives
5. Economic Engagement
5 Things to Preview on the ORSP Site

6. Enterprise Navigation and Project Lifecycle
7. Find Funding (Research Site)
8. The RAAC page
9. ORSP Staff Lookup
10. News Archives or Frequently Required Proposal Data
5 Things to Preview on Research Ethics & Compliance Site

11. The Ethics & Compliance Landing Page
12. Main Menus
13. Page-level Menu
14. Page Features
15. Expect changes!
Preparing to **Launch**

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<td>Quality Assurance Testing</td>
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<td>• Style Guide</td>
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<td>Pre-Launch Communications</td>
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<td>• Internal Meetings</td>
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<td>• Presentations &amp; Demos</td>
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<td>Sponsored Programs Internal Meetings</td>
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<td>• Editing, Presentations &amp; Demos</td>
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<td>UMOR Management Team</td>
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<td>RAAC at Large</td>
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<td>RAPid (pre-announce)</td>
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| Rollout Tasks                                                                      | Target Date            |        |
| Evaluate Feedback, Fixes and Plan for Continuous Improvement                       | March 30 - Ongoing     |        |
| Move to New Web Server                                                            | March 25               |        |
| Establish redirects                                                               | March 27               |        |
| Final Launch and Change Management: Communicate URL changes to Inbound Link Sources | Begin March 30 – April 13 |        |
| Submit Site Maps to Google. Test Redirects.                                       |                        |        |

| Post-Launch Communications                                                         |                        |        |
| Links from U-M Gateway, Finance - Sponsored Programs                              | Launch + 1             |        |
| RADs, RAN, Twitter, Linked In                                                     | May 4, May 6           |        |
Thank you!

We look forward to your visit.