Research Administrators Network Meeting
May 14, 2013 Agenda

Welcome

Updates

- ORSP--Daryl Weinert
- RA Schools/Colleges--Cathy Seay-Ostrowski
- ITS--Cathy Handyside
- Sponsored Programs--Thom Madden and Pete Gerard

Putting the N back into RAN-Pat Turnbull

RAAC Subcommittee Updates

- Communication--Nancy Stock and Peggy Westrick
- Metrics--Diane Winter
- Process--Heather Offhaus
- Training--Cathy Seay-Ostrowski
WELCOME

May 14, 2013
Changes made by RAAC Communication Subcommittee

- Moved the room around to make it feel cozier
- Slightly different format
- Bringing back the networking part of the meeting
- Today:
  - We have a shorter meeting so we can celebrate with the OVPR Service Award recipients
  - We will be using i>Clicker Technology
Research Administration
Schools and Colleges

RASC
Membership

- Carole Bach, Institute for Social Research (ISR)
- Lori Bowden, School of Public Health (SPH)
- Linda Forsyth, College of Engineering
- Heather Offhaus, Medical School
- Cathy Seay-Ostrowski, OVPR Units, Chair
- Scott Stanfill, Small Schools and Colleges, Scribe
- Peggy Westrick, College of Literature, Science and the Arts (LSA)
Mission Statement
The Research Administration Schools Committee (RASC) exists to:

• Identify research administration issues in need of resolution from the Schools and Colleges perspective.
• Make recommendations for policy or system changes in research administration.
• Share ideas and solutions regarding best practices in the research administration arena.
• Consolidate School/College opinions regarding issues and share with other University groups such as the Research Administrative Advisory Group (RAAC), the Office of Research and Sponsored Programs (ORSP), Sponsored Programs Financial Operations, Contract Administration, and the like.
Current Activities

- We are collecting information on what each unit reviews when they are approving PAFs for multi-unit (Schools/Colleges) proposals. We hope to use this to develop a best practice document for Research Administrators to use.

- Our group has been discussing such things as A-21 policies and how we monitor and practically adhere to these policies in our respective units.
SUBK Amendments

Request an amendment to change part of the subcontract agreement. E.g., a no-cost time extension on the prime award that also extends to the subcontractor institution.

Who can request a SUBK amendment?

• Request is usually started by the PI/Project Team and sent to OCA. OCA creates an amendment to the agreement and sends it to the subcontracting institution.

• OCA has the ability to initiate an amendment, if necessary.

When can it be requested?

• SUBK must be **Active** in order to request an amendment.

• Only one amendment request can be in progress at any given time. You must wait for an amendment cycle to finish before requesting additional amendments.
Starting an Amendment

Current State of SUBK is Active.

Click the Request SUBK Amendment activity.

Activity window opens with a brief explanation of the amendment process.

Enter comments, if desired, and click OK.
Indicate the type(s) of changes requested.

The Amendment Request Form will display questions based on the change type(s) indicated here.
:: Converted SUBKs

- Imported into eRPM on April 19th, along with the new amendment functionality.
- Only paper subcontracts with an end date of 10/1/2012 or later were imported.
- Converted records are now attached to one PAF in eRPM. Best attempts were made to make the data match both PAF and the M-Pathways Financial System.
- Denoted in eRPM with the ID of SUBK-C + 4 numbers.
- If you need to amend an existing paper subcontract that was not converted, contact subcontracts@umich.edu.

SUBK-C00000617
SUBK-C00000767
SUBK-C00001042
SUBK-C0312
SUBK-C1022
SUBK-C0066
SUBK-C1333
Training

To learn more about submitting and amending subcontracts:

• Download the step-by-step instructions on the eResearch site:
  • http://www.umich.edu/~eresinfo/erpm/docs/PM_PT_subcontracts_SS.pdf
  • http://www.umich.edu/~eresinfo/erpm/docs/PM_SUBK_Amend_SS.pdf

• Attend the Subcontracts Webinar on **May 29**\(^{th}\) from **11 am-12 pm**. This session will include a presentation, demo, as well as answer any participant business or technical questions.

For detailed instructions for attending a webcast please visit here: http://www.mais.umich.edu/WebConferencing/downloads/WC_AttendingaMAISWebConference_ss.pdf
NETWORKING

HTTP://MP3SKULL.COM/MP3/JEOPARDY_THEME_MUSIC.HTML
HTTP://MP3SKULL.COM/MP3/CHICKEN_DANCE_SONG.HTML
Networking

Would you prefer networking opportunities that allow you to interact with:

A. peers from other units who have jobs similar to yours
B. people in central offices (ORSP, SP)
C. both groups above, at the same time
D. both groups above individually
The type of networking activity I would most prefer is:
A. a fun activity that is pre-planned and directed
B. an unstructured period where tables can talk about whatever comes up
C. an informal discussion about a specific predetermined topic
Membership
- Amanda Coulter, ORSP
- Barb Tietjen, Taubman College
- Cathy Handyside, ITS eResearch
- David Lampe, OVPR
- Leslie Chavez, Sponsored Programs
- Lori Deromedi, OVPR Compliance
- Nancy Stock, Kinesiology
- Pat Turnbull, Dearborn
- Peggy Westrick, Chair, College of LSA
- Suzanne Tainter, ORSP
Communication

Scope

The RAAC Communication Subcommittee will provide expertise and advice to ensure that ORSP, Sponsored Programs, and the Schools/Colleges are speaking with one voice to the University’s Research Administration community. We will review, evaluate, and recommend actions, as well as provide gap analysis for research administration communications at the University. Additionally, this Committee will help develop the RAN agendas, and be a resource for providing advice and feedback on the ways of communicating change as UM research administration evolves.
Communication

- We are developing a RAN virtual “drop box” for suggestions/concerns about processes in the various offices (SP, ORSP, ITS, Schools/Colleges).
- This drop box would be automated to forward to a specific person at each of the offices for their assessment.
- If it is something that is overarching then it would go to RAAC.
- Once a problem is fixed or a process is developed from the drop-box our Committee would communicate that change most likely through a UM wide RAN email group.
Communication

1. When using the websites of the Schools/Colleges, ORSP, and/or Sponsored Programs which is most important:
   A. Content
   B. Lay-out
   C. Number of Clicks to find information
   D. Speed
2. Does the Research Administration community communicate (pick which one best represents your opinion):

   A. Too much?
   B. Too little?
   C. Just right?
   D. Mostly on relevant topics?
RAAC METRIC SUB-COMMITTEE

Committee Update to RAN
May 14, 2013

- Compliance
COMMITTEE MEMBERS

Diane Winter – Chair - ISR
Catherine Seay-Ostrowski - UMTRI
Jeff Longe - ORSP
Dan Stanish - ORSP
Linda Forsyth - Engineering
Mary Martinowicz - Nursing
Mike Randolph - ITS
Patricia Schultz - Dentistry
Brandon Cachia – Sponsored Programs
Steve Beach - LSA
Teri Grieb - Medical
Scope

Metrics Specific to UM Data
- Strategic
- Tactical

Advisory
- ORSP Metric Committee
- Metric Design / Specifications
Research
• What are metrics
• Who already has metrics
• How are metrics being used
• Availability of external data
• Who are our peers

Advisory
• Feedback to ORSP about surveys and data
• Handling feedback within our own domain
• Determine needs / uses

Metric Inventory
• Create Inventory
• Categorize
  • Strategic
  • Tactical

Develop a Quick Win
• Review raw data output
• Re-define data points
• ORSP and Units want to know, “How are we doing?”
• Days to ORSP before proposal Due Date
• Data available
• Report is in its 4th iteration
• What does it tell us?
• How would you (unit) use?
• How frequently?
Survey
- Audience: RAAC Units
- One voice per Unit
- Top 5 Strategic
- Top 5 Tactical
- What’s Missing

Deliver Quick Win
- Days to ORSP before Due Date by School
  - Defining data points

Develop Focus Groups
- Effectiveness
- Efficiency
- Test Drive

Prioritize Metrics
- What exists
- What needs to be built
- Business Objects Query vs. MReport
  - Push/Pull
  - How will metric be used?
  - What are the performance targets?

Long-Term
- Inventory External Data
  - Gov’t data sources
  - NSF Reports
  - COGR Reports
- Dashboards
  - Compliance
  - Productivity
GOAL: Effective & Efficient Metrics will provide Measurable data for Strategic and Tactical decision making
1. **What do metrics tell us?**
   A. Productivity
   B. Process Efficiency
   C. Data for fact based decisions
   D. Strategic planning trajectories
   E. All of the Above
2. Understanding and defining the data points is essential in building metrics?
   A. True
   B. False
Process Subcommittee

Carole Bach
First 6 Topics We Are Tackling

- Award Acceptance / System Solution to Award Process
- Electronic Solution to the Budget Allocation process (7471s)
- Best Practices in how to effectively use the Post A Comment and other text activities in eRPM
For Best Practices for using the “Post A Comment” function in eRPM, would you like the Process Group to focus on:

A. Request action by the recipient (PRA, PI, Unit, ORSP, Spons Prog)

B. Convey time sensitive issues

C. Only provide information that isn’t actionable

D. All of the above - Everything and Anything!
First 6 Topics We Are Tackling

- Identified and defined Roles & Responsibilities between Units and Central Services

- UFAs: An electronic solution for capturing, routing, and viewing

- Quick Win – move the Change of Title to the top of the Post A Comment Activity
Process Poll #2

As we address the next “Quick Win” in eRPM, it would be most helpful to me to have:

A. Additional fields under Manage Unit Data
B. Unit level access to PAFs for faculty with joint appointments
C. Improved layout/readability in system issued emails
D. I’m good for now, thanks for asking.
Cathy Seay-Ostrowski, UMTRI, (Chair)
Cathy Handyside, ITS, (Co-Chair)
Lori Deromedi, ITS
Teresa Herrick, Ross School of Business
Melinda LaRocca, College of Engineering
Mary Martinowicz, School of Nursing
Marifelice Roulo, ORSP
Sharyn Sivyer, ORSP
Lea Tune, Sponsored Programs
Pat Turnbull, UM -Dearborn
UM RAAC TRAINING SUBCOMMITTEE

STEP 1
CHARGE

STEP 2
NEEDS ANALYSIS

STEP 3
RESULTS
STEP 1 – CHARGE AND SCOPE

- Inventory and access current training within and beyond UM research administration
  - Central Units
  - Academic Units
  - Professional Organizations
  - Other Universities
STEP 2 – NEEDS ANALYSIS

- Needs Analysis Tool
  - Identify Training Gaps
  - Conduct a Survey
Step 3 – Next Steps

RESULTS

- Results
  - Analyze survey results
  - Recommend new trainings to be developed at UM
  - Identify training delivery methods for new training
  - Work with other UM committees as appropriate
RAAC TRAINING COMMITTEE CHECKLIST

WE ARE HERE

CHECKLIST

- Identified Charge
- Presentation to RAAC
- Created the SURVEY
- SURVEY Focus Group
- SURVEY Research Administration Community
- Analyze survey results
- Recommend new training
- Recommend training methods
1. Do you feel you are supported by your unit in attending training and professional activities in research administration:
   
   A. Yes
   
   B. No
2. What training mode would you like to see more of in research administration:
   A. Interactive instructor-led workshop
   B. In person lecture/demonstration
   C. Webinar
   D. e-learning
   E. Self-paced, non-electronic (i.e. training manual)
# Session 5/14/13 Summary Report: RAN

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AP = Anonymous Polling.
Session Average = Average calculation based only on students who voted in this session.
Average Score per Question: Average calculation based only on students who responded to this question.

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**Question 1**

**Question Type:** Multiple Choice  
**Significant Characters:** 16  
**Time Started:** 2:33:39 PM  
**Correct Answer(s):** ?  

**Maximum Score:** 0.00  
**Number of Responses:** 171  
**Number Missing:** 17  
**Class Average:** 0.00

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<tr>
<td>E</td>
<td>6</td>
<td>4%</td>
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Networking

Would you prefer networking opportunities that allow you to interact with:

A. peers from other units who have jobs similar to yours  
B. people in central offices (ORSP, SP)  
C. both groups above, at the same time  
D. both groups above individually

![Bar Chart](chart.png)
Question 2

Question Type: **Multiple Choice**  
Significant Characters: 16  
Time Started: **2:35:19 PM**  
Correct Answer(s): ?  

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<tr>
<td>E</td>
<td>8</td>
<td>5%</td>
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The type of networking activity I would most prefer is:
A. a fun activity that is pre-planned and directed  
B. an unstructured period where tables can talk about whatever comes up  
C. an informal discussion about a specific predetermined topic

**Diagram:**

- A: 26 (19%)  
- B: 26 (19%)  
- C: 33 (68%)  
- D: 8 (5%)  
- E: 2 (1%)

**Maximum Score:** 0.00  
**Number of Responses:** 157  
**Number Missing:** 31  
**Class Average:** 0.00
**Question 3**

**Question Type:** Multiple Choice  
**Significant Characters:** 16  
**Time Started:** 2:47:44 PM  
**Correct Answer(s):** ?

**Maximum Score:** 0.00  
**Number of Responses:** 172  
**Number Missing:** 16  
**Class Average:** 0.00

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<tr>
<td>E</td>
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**Communication**

1. When using the websites of the Schools/Colleges, ORSP, and/or Sponsored Programs which is most important:
   A. Content
   B. Lay-out
   C. Number of Clicks to find information
   D. Speed

![Bar Chart](chart.png)
Question 4

Question Type: Multiple Choice
Significant Characters: 16
Time Started: 2:49:00 PM
Correct Answer(s): ?

Maximum Score: 0.00
Number of Responses: 161
Number Missing: 27
Class Average: 0.00

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<td>E</td>
<td>4</td>
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2. Does the Research Administration community communicate (pick which one best represents your opinion):
   A. Too much?
   B. Too little?
   C. Just right?
   D. Mostly on relevant topics?
   E. Other (please specify):
### Question 5

**Question Type:** Multiple Choice  
**Significant Characters:** 16  
**Time Started:** 2:55:23 PM  
**Correct Answer(s):** ?

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**Maximum Score:** 0.00  
**Number of Responses:** 157  
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**Metrics**

1. What do metrics tell us?
   - A. Productivity
   - B. Process Efficiency
   - C. Data for fact-based decisions
   - D. Strategic planning trajectories
   - E. All of the Above

![Bar chart showing responses](chart.png)

- A: 3 (2%)  
- B: 1 (1%)  
- C: 4 (6%)  
- D: 2 (1%)  
- E: 147 (94%)
Question 6

Question Type: **Multiple Choice**
Significant Characters: **16**
Time Started: **2:55:57 PM**
Correct Answer(s): ?

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<th>Answer</th>
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<tr>
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Maximum Score: **0.00**
Number of Responses: **157**
Number Missing: **31**
Class Average: **0.00**

2. Understanding and defining the data points is essential in building metrics?

A. True
B. False
For Best Practices for using the “Post A Comment” function in eRPM, would you like the Process Group to focus on:

A. Request action by the recipient (PRA, PI, Unit, ORSP, Spons Prog)
B. Convey time sensitive issues
C. Only provide information that isn’t actionable
D. All of the above - Everything and Anything!

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<th>Answer</th>
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Maximum Score: 0.00
Number of Responses: 159
Number Missing: 29
Class Average: 0.00
**Question 8**

**Question Type:** Multiple Choice  
**Significant Characters:** 16  
**Time Started:** 3:06:10 PM  
**Correct Answer(s):** ?  

**Maximum Score:** 0.00  
**Number of Responses:** 156  
**Number Missing:** 32  
**Class Average:** 0.00

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</tr>
<tr>
<td>E</td>
<td>3</td>
<td>2%</td>
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**Process Poll #2**

As we address the next “Quick Win” in eRPM, it would be most helpful to me to have:

A. Additional fields under Manage Unit Data  
B. Unit level access to PAFs for faculty with joint appointments  
C. Improved layout/readability in system issued emails  
D. I’m good for now, thanks for asking.

---

![Bar Chart](image)
Question 9

Question Type: Multiple Choice
Significant Characters: 16
Time Started: 3:10:16 PM
Correct Answer(s): ?

<table>
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<th>Answer</th>
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<th>%</th>
<th>Performance Points</th>
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<tbody>
<tr>
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<td>80%</td>
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<tr>
<td>B</td>
<td>28</td>
<td>18%</td>
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<tr>
<td>C</td>
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<td>0%</td>
<td>0</td>
</tr>
<tr>
<td>D</td>
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<td>1%</td>
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</tr>
<tr>
<td>E</td>
<td>2</td>
<td>1%</td>
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</table>

1. Do you feel you are supported by your unit in attending training and professional activities in research administration:
   A. Yes
   B. No
Question 10

Question Type: **Multiple Choice**
Significant Characters: **16**
Time Started: **3:10:58 PM**
Correct Answer(s): ?

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<tr>
<td>C</td>
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</tr>
<tr>
<td>D</td>
<td>32</td>
<td>20%</td>
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<tr>
<td>E</td>
<td>7</td>
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</table>

**Maximum Score: 0.00**
Number of Responses: **159**
Number Missing: **29**
Class Average: **0.00**

2. What training mode would you like to see more of in research administration:
   A. Interactive instructor-led workshop
   B. In person lecture/demonstration
   C. Webinar
   D. e-learning
   E. Self-paced, non-electronic (i.e. training manual)