Meeting Agenda

- eRAP Refresher
- Huron Report & Scope of eRAP
- Staffing & resource requirements
- Project Team Roles & Responsibilities
- Next steps – interim OCGA improvement to proposal Log and proposal submittal
- Discussion
What is eRAP?

- Campus-wide initiative to implement systems and tools that support improved management by departmental personnel and central offices of sponsored research lifecycle!

Goal

- Continually transform research administration to streamline business processes that minimize the time researchers and research support staff must spend on administrative activities
Why eRAP?

- UC San Diego consistently ranked among top 10 US research universities
  - Requires significant administrative effort by departments and central offices
  - Uses sub-optimal departmental facing research administrative systems & processes
  - UCSD is behind the times – sponsors and cohorts have made advancements in automation & systems years ago
- Endorsed Strategy...
  - Proceed to re-engineer the tools & processes that manage the processes that fulfill the lifecycle of our substantial research portfolio
Develop and deliver enterprise departmental systems that:

- provide functionality for department and PI facing proposal preparation & submission processes
  - Workflow, routing and approvals
  - Transparent visibility to status, to-do’s, and processing time
- improve and standardize processes and systems for departmental ease and usability
- integrate with central office proposal and award administration requirements
- integrate processes with accurate reporting for department research administrative requirements
Coordinating and Contributing Staff Resources

- **Initial Phase – Coeus Proposal Development and Reporting**
  - Project Management
    - Project Manager & Business Analyst
    - Training & Communication Manager
    - Research Administration Portal coordinator
  - Coordination with all campus central pre-award offices
    - OCGA, HS SPPO, SIO OCGA, OCTA, and OPAFS
    - AA, HS and SIO departmental experts
  - Technical Staff
    - Coeus Developers
    - Research Data Management & Reporting Developers
    - Shared resources for ACT operational infrastructure
PD Project Phases

- Timeline: July 2011 – June 2013
  - Requirements Analysis and Process Re-engineering
  - System Implementation and Testing
  - Pilot
  - Training
  - Roll-out
  - Steady-state (care and feeding)
  - Next Phases
Scale of Proposal Development & Reporting Rollout

- **Audience:**
  - 6 Central Offices – all staff
  - 137 departments

- **Estimated target population affected:**
  - Pilot 60-80 Departmental Staff and Central Office users
  - Initial campus-wide rollout: 800
  - Entire population over 2 years / system lifespan: 1500-2000

- **Initial campus-wide training phase:**
  - 600 trainees, some will attend multiple modules for multiple functional responsibilities
  - 90 half day sessions with 12-15 participants each
  - 6 half day sessions per week delivered by 2 training teams over 15 weeks
  - Training teams: Training Manager, Customer Care Manager, Central Office SMEs + 1 admin

- **“Steady State” training**
  - Provide ongoing training to new employees due to staff turnover and evolving business processes requirements in 137 departments & 6 central offices. Topics include:
    - Intro to Proposal Development (Coeus Lite)
    - Budget preparation
    - Advanced Coeus (Premium)
    - Reporting: Award & Proposal Data
Next Steps - PD

- To-Do’s for PD Project Team:
  - Complete PD functional requirements
  - Review functional requirements with UCSD stakeholders to get input and finalize/approve
    - Engage key business officers for workflow and approval models
    - Engage financial administrators to develop proposal development budget templates
Next Steps - Reporting

- Assemble Reporting Team and begin meeting (in progress)
- Identify current challenges with:
  - Data warehouse: data structure, availability, access, usability, etc.
  - Reporting tools: Querylink, Cognos, homegrown, etc.
  - User training gap analysis
- Identify reporting needs
  - Develop project plan to improve C&G reporting capabilities
OCGA Commitment to Customer Service

Customer service surveys indicate the campus research community seek confirmation of the following from OCGA:

- Who will be processing a specific proposal in OCGA?
- Did OCGA receive my proposal package?
- Is additional information required so the OCGA analysts can effectively review/submit proposals?
- Better communication between department/ORU staff and OCGA
Proposal Submission Process Email Address

- **Proposals-ocga@ucsd.edu**
- Fulfills 4 important objectives
  - Logs proposal within OCGA for tracking
  - Assigns to OCGA analyst
  - Communicates status to customer
  - Records existence of proposal **real time** in Coeus
    - Once proposal is logged in “Proposal Log”, status is posted to data warehouse
- Provides a **single email address** for all proposal related communication and documentation
Proposal Log Web Service Changes

Additional instructions to guide the user of circumstances when proposal log web services does not apply.

Pre-award contacts are displayed on the first page of the web service to ensure excellent customer service.

Note: Instead of using the proposal log web service, please contact the appropriate central office for the following types of situations.

- Anticipated Award type is Sponsor Initiated Clinical Trials - Contact OCTA
- PI is not established in PPS - Contact appropriate pre-award office
- Proposing to a new sponsoring agency - Contact appropriate pre-award

<table>
<thead>
<tr>
<th>Central Office</th>
<th>Phone Number</th>
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<tbody>
<tr>
<td>OCGA</td>
<td>(858) 534-3330</td>
</tr>
<tr>
<td>OCTA</td>
<td>(858) 534-xxxx</td>
</tr>
<tr>
<td>HS SPPO</td>
<td>(858) 822-4109</td>
</tr>
<tr>
<td>SIO</td>
<td>(858) 534-4570</td>
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</tbody>
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Enter PI name for your new UCSD proposal number
The field titled ‘Proposal Category’ was replaced with ‘Anticipated Type of Award’.

Additional options have been added to the ‘Anticipated Type of Award’ drop down options.

New Field: ‘Prime Sponsor’ Added
Proposal Log Web Services Changes

‘Assigned Office’ Field was added to facilitate the new OCGA Proposal Process.

‘Sponsor Deadline’ Options have been expanded
Proposal Submission Process Correspondence

- Two emails are associated with the new process
  - Email 1 = confirms that OCGA has received and assigned proposal to OCGA analyst
  - Email 2 = confirms sufficient supporting documentation is received and the OCGA Analyst is reviewing proposal

- Information included in emails
  - UCSD Proposal Number
  - PI Name
  - Department Contact
  - Proposal Sponsor
  - OCGA assigned Analyst name, email, and phone number
Questions