Overview for ABA/ ORUBA

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Jason DeFay
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Beatrice Dormoy
**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!

<table>
<thead>
<tr>
<th>Goals</th>
<th>Why?</th>
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<tbody>
<tr>
<td>• Continually transform research administration</td>
<td>• UCSD in top 10 for research</td>
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<tr>
<td>• Streamline and standardize business processes</td>
<td>• Requires significant administrative effort by</td>
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<tr>
<td>• Minimize time researchers and research support staff spend on</td>
<td>departments and central offices</td>
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<tr>
<td>administrative activities</td>
<td>• Current sub-optimal departmental facing</td>
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<td></td>
<td>research administrative tools</td>
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<td>• Behind the times – many advancements in</td>
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<td>automation &amp; systems years ago</td>
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Executive Committee (AVC’s, Directors, Faculty)

- **VC Areas**
  - Scripps Institution of Oceanography
  - Health Sciences Dean’s Office
  - Research Affairs, Chair
  - Academic Affairs EVC Office
- **Faculty Representatives**
  - SIO
  - Health Sciences
  - Academic Affairs
- **Stakeholders**
  - Audit & Management Advisory Services
  - Business & Financial Services
  - Administrative Computing & Telecommunications

Steering Team

- **Co-Chairs**
  - Research Affairs - Jason DeFay
  - OCGA – Linda Collins
- **Central Offices**
  - HSSPPO – Maureen O’Connor
  - SIO OCGA – Nancy Wilson
  - OPAFS – Mark Cooper
  - Procurement & Contracts – Ted Johnson
  - Administrative Computing – Kevin Chou
- **Departments/ORUs**
  - SIO – Anne Cressey
  - Health Sciences – Patty Camacho
  - Academic Affairs – Alma Palazzolo
- **Compliance Offices**
  - Animal Care Program – Phil Richter
  - EH&S - Gary MacPherson
  - HRPP - Michael Caligiuri
  - COI – Valerie Dixon
  - IACUC Office – Marilyn Torchia
  - TTO – Jane Moores
- **eRAP**
  - Beatrice Dormoy – eRAP Project Manager
UCSD Contract & Grant Proposals
Fiscal Years 2003 - 2012

* FY 09 and 10 reflect proposal increase due to stimulus opportunities
UCSD Contract & Grant Awards
Fiscal Years 2003 - 2012
(Dollars in Millions)

<table>
<thead>
<tr>
<th>Year</th>
<th>Awards (Millions)</th>
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<tr>
<td>2003</td>
<td>$627</td>
</tr>
<tr>
<td>2004</td>
<td>$640</td>
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<tr>
<td>2005</td>
<td>$728</td>
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<tr>
<td>2006</td>
<td>$733</td>
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<tr>
<td>2007</td>
<td>$714</td>
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<tr>
<td>2008</td>
<td>$829</td>
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<tr>
<td>2009</td>
<td>$882</td>
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<tr>
<td>2010</td>
<td>$1,059</td>
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<tr>
<td>2011</td>
<td>$960</td>
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<tr>
<td>2012</td>
<td>$1,010</td>
</tr>
<tr>
<td>Metric</td>
<td>2002</td>
</tr>
<tr>
<td>----------------------------------------------------</td>
<td>-------</td>
</tr>
<tr>
<td>Proposals/Transactions</td>
<td>3187</td>
</tr>
<tr>
<td>$$ Awarded</td>
<td>$550M</td>
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<tr>
<td>Award Transactions</td>
<td>3908</td>
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<tr>
<td>Individual PI's</td>
<td>1075</td>
</tr>
<tr>
<td>Departments and ORU's</td>
<td>105</td>
</tr>
<tr>
<td>Sponsors</td>
<td>660</td>
</tr>
<tr>
<td>Staff involved in sponsored research administrative duties</td>
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Current Projects

• **ePD** - Coeus Proposal Development module for entire campus
  - Phase 1 Basic
  - Phase 2 Advanced

• **eMTA** - Click Commerce electronic material transfer agreement request system

• **Reporting** - Research Data Warehouse with enhanced reporting capabilities (at risk of completion)
ePD (Electronic Proposal Development)

- Web based system for departments and proposal creators to...
  - create, upload, route, approve, submit and store sponsored research proposals
  - improves, automates, streamlines and standardizes business processes for departments and central offices
  - Integrate with Coeus enterprise databases, data warehouse and sub-systems
...who else is using it?

...just to name a few
ePD Features

- **Streamline** & automate PD processes by replacing current manual & paper-based tasks
- **Provide** central repository for proposal documents
- **Create** online collaboration interface for various entities involved in PD & pre-award processing
- **Eliminate** or minimize data entry duplication & ensure data validation
- **Speed up** routing & approval
- **Allow** status tracking & improve proposal workload visibility
- **Reduce** reliance on shadow systems
- Catalyst for **self-directed learning** through intelligent questions and self-help
ePD Rollout Plan

• Planned progressive rollout to:
  • 130 campus research departments/divisions/ORUs
  • starting Fall 2013 – Spring 2014

• The team a limited term cross-functional team:
  • project manager
  • training manager
  • operations manager
  • 2 developers
  • 3 sponsored projects central offices (project assignments)
  • 4 pilot testing departments (28 departmental/ORU staff)
A Quick Tour ...
Where are we now with ePD?

- Hardware infrastructure expanded
- Production environment software upgraded
- Pilot testing in progress:
  - 30 Pilot testers testing hundreds of proposal scenarios
  - Implementing 1st round of Pilot feedback
- Deployment Planning: Evaluating scope of ePD functions for Phase 1
- Touch points / Data integration analysis in progress
  - Identifying downstream data/system dependencies (IFIS, PPS, etc.)
  - Mapping new business processes
  - Prep for associated QA
- Developing communication plan for faculty and staff
- Developing training and customer support strategies
ePD Pilot Testing Overview

4 Pilot Departments (14 testers)
  - MPL, Neurosciences, SDSC and Physics

3 Central Offices (13 testers)
  - OCGA, SIO OCGA & HSSPPO

Pilot Testing underway
  - Orientation & training complete
  - Reconfiguring system based on feedback
  - Repeat tests and document results
  - Scheduled to proceed through May 2013

Over 7,000 unique proposal scenarios identified (proposal type, sponsor type, award type, etc.)
  - Testing dozens of proposal scenarios

Feedback from Pilot Testers
Impact/Considerations

- **Change management** - adoption of new process, system and business rules will be challenging.
- **New functionalities** – support new levels of accountability/compliance but may increase effort required.
- **Training** – UCSD research community is large & training needs are complex.
- **Complexity** - project has limited resources and there is a high demand for efficiency and success.
- **Phased feature roll out**
  - Basic ePD
  - Advanced ePD
Thank You!

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