Research Administrator Portal
A Technology Solution to Support Research Administration Activities at the Unit Level
April 21, 2016

Overview

What is the Research Administrator Portal?

a technology solution designed to bring people and information together in one place for a common purpose – a more efficient and effective way to manage research at the unit level.
Institutional processes with a current “system” to process activity.

Unit-level activities with little or no technology support.

But why, if my Department is managing research just fine without this?

I mean, we are passing our metrics, nothing is broken, so what are we trying to fix?

Well, consider this....
This is Jane.

Jane is a Research Administrator.

Jane needs to provide an analytical report to her supervisor, so she manually compiles data from various systems.

Jane needs to make a request of another department, so she copies and pastes system to system to make her request.

Jane must track documents for all of the projects she manages, so she creates a paper filing system that is cumbersome to maintain and time-consuming to search.
This is Jack.
Jack is a Research Administrator.

Jack wants a more efficient way of doing his work, so he creates work-arounds and shadow systems to get stuff done faster.

Jack wants accountability and transparency in the process, so he uses email to document every transaction.

Jack needs to keep track of his workload and deadlines, so he uses spreadsheets and calendars to keep track of tasks.

The initial design includes...
- Reporting capabilities
- Form generation
- Process workflow
- A document repository
- Document sharing and version control
- A visual of all tasks and due dates
Research Administrator Portal (RAP)
Technical Overview

A Display/Integrate Info from External Applications (Apps)

1. Source
   - Existing Apps
     - NO CHANGES
       - NOT INTEGRATED INTO RAP
   - Planned Changes
     - CHANGES PLANNED
       - FOR INTEGRATION INTO RAP
   - Future Apps

2. Connect
   - Support RAP
     - SUPPORTING RAP
       - FOR INTEGRATION INTO RAP
   - Separate Effort
     - SEPARATE EFFORT
       - NOT INTEGRATED INTO RAP

B Build Internal Work Management & Collaboration Features

- Create
  - Document Management
  - Workflow
  - Task Management
  - Template
  - Notifications
  - Reporting
  - Security
  - Calendar

Organizational Synergy

Integrating People, Process and Technology

Organizational Synergy

- People
  - who does the work
    - the right number of people
    - in the right places
    - with the right knowledge skills and abilities (proficiency)
    - and attitude (efficacy)

Technology

- tools that help do the work
  - tools that work in tandem to automate and support a process

Process

- how work gets done
  - tasks and activities performed (macro and micro level)
  - in order to achieve a specific output

who does the work
the right number of people
in the right places with the right knowledge skills and abilities (proficiency) and attitude (efficacy),

People

Technology

Process
The Case for a Unit-Level Technology Solution

How to Achieve Organizational Synergy...

Technology

- Replace Paper-based Systems and Email-based Processes
- Reduce or Eliminate Duplicate Data Entry
- Replace Redundant Shadow Systems
- Increase Transparency
- Improve Reporting & Analytical Capabilities

How to Achieve Organizational Synergy...

The Case for a Unit-Level Technology Solution

<table>
<thead>
<tr>
<th>People</th>
<th>Current State</th>
<th>Goal</th>
</tr>
</thead>
<tbody>
<tr>
<td>Service to Faculty</td>
<td>Highly Variable</td>
<td>Consistent support level to all investigators</td>
</tr>
<tr>
<td>Roles &amp; responsibilities</td>
<td>Unclear</td>
<td>Defined and well-documented Accountability through data and metrics</td>
</tr>
<tr>
<td>Staff proficiency</td>
<td>Inconsistent</td>
<td>Knowledgeable and competent staff Business process training &amp; support provided</td>
</tr>
<tr>
<td>Back up support</td>
<td>Nonexistent</td>
<td>Ability to balance workload and provide back-up for staff</td>
</tr>
</tbody>
</table>

4/21/2016
### The Case for a Unit-Level Technology Solution

#### How to Achieve Organizational Synergy...

<table>
<thead>
<tr>
<th>Current State</th>
<th>Goal</th>
</tr>
</thead>
<tbody>
<tr>
<td>Process</td>
<td></td>
</tr>
<tr>
<td>Fragmentation</td>
<td>Collaborative team approach to processes</td>
</tr>
<tr>
<td>Operate in Silos</td>
<td></td>
</tr>
<tr>
<td>Inconsistency</td>
<td>Consistent, standardized and streamlined processes</td>
</tr>
<tr>
<td>Gaps and Overlaps</td>
<td></td>
</tr>
</tbody>
</table>

#### Goals of the Project

**What will we achieve?**

- **Strategic**
  - Reduce operational costs
  - Provide better service to all stakeholders; specifically our investigators
  - Improve overall management of our research portfolio
  - Increase employee job satisfaction

- **Organizational**
  - Enhance staff expertise and increase proficiency levels
  - Reduce redundancy and overlap in service delivery
  - Clarify roles & responsibilities
  - Provide management tools that help balance workload and provide increased coverage for staff

- **Business Process**
  - Reduce the time it takes to perform routine unit-level research administration tasks
  - Create standardized business process
  - Improve communication between/among unit-level and central research administration communities

- **Technology**
  - Replace paper-based systems and email-based processes
  - Replace redundant shadow systems
  - Reduce or eliminate duplicate data entry
  - Increase workflow transparency and real-time status updates
  - Improve reporting and analytical capabilities
**Project Details**

**How will the project be managed and who is responsible for the finished product?**

The Research Administrator Portal project will be governed using a structure adapted from the Closeout Project.

- **Working Groups**: Generates ideas and makes recommendations.
- **Advisory Group**: Vets WG output, prioritizes, operationalizes and champions the product.
- **Steering Committee**: Provides executive oversight, approves scope/schedule/priority, resolves issues.
- **Leadership Committee**: Provides senior business unit level perspective on planned activities, supports and drives implementation.
- **Core Project Team**: Leads the way to the ultimate technology solution.

---

**Project Details**

**When will the project be complete?**

Timeline for completion is **18-24 months from project initiation**.

Some components will be released **iteratively**.

Full implementation is expected by **Spring 2018**.
Questions or Comments?

Research Administrator Portal

People | Process | Technology

...Working Together.