

# **New Post Award Management Process**

**Essentially as presented to  
DAC March 5, 2013**



# Administrative Modernization Research Subcommittee

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- **Maria Ceo**
- **Jack Cichon**
- **Jamie Dimond**
- **Teri Grieb**
- **Karen Lang**
- **Marty Lawlor**
- **Heather Offhaus**
- **Brenda Paulsen**
- **Craig Reynolds**
- **Scott Wood**

# History and Purpose

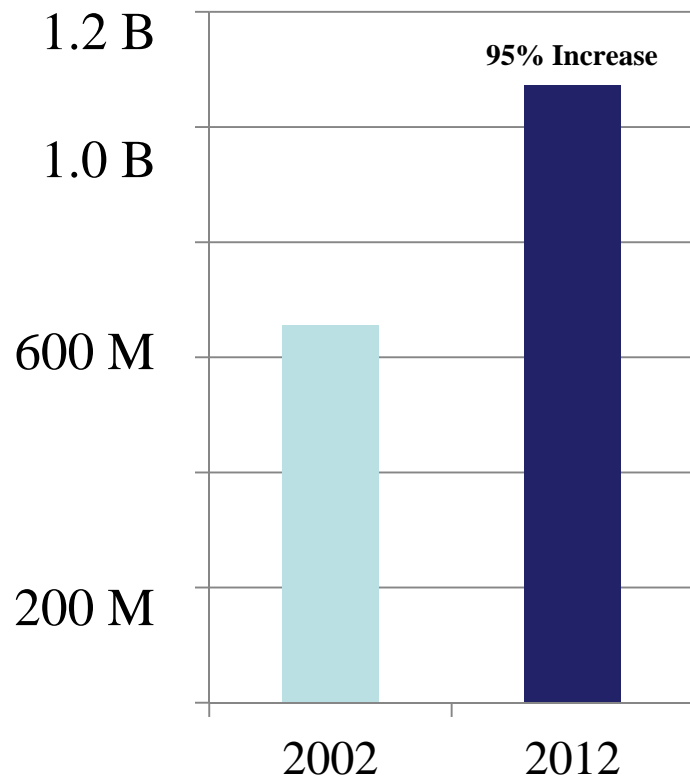
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- **Aggressive strategic growth plans to double research (OVPR), increase clinical research (UMHS), and expand NIH Market Share (UMMS) have realized research expansion at faster rates than staffing**
- **Primary purpose of initiative is to improve service and quality to Faculty, Administrators, Chairs and Dean**
- **No standard practices across departments**
- **No standard practices across divisions in the same department**
- **May be used across the University – other schools, colleges and institutes**

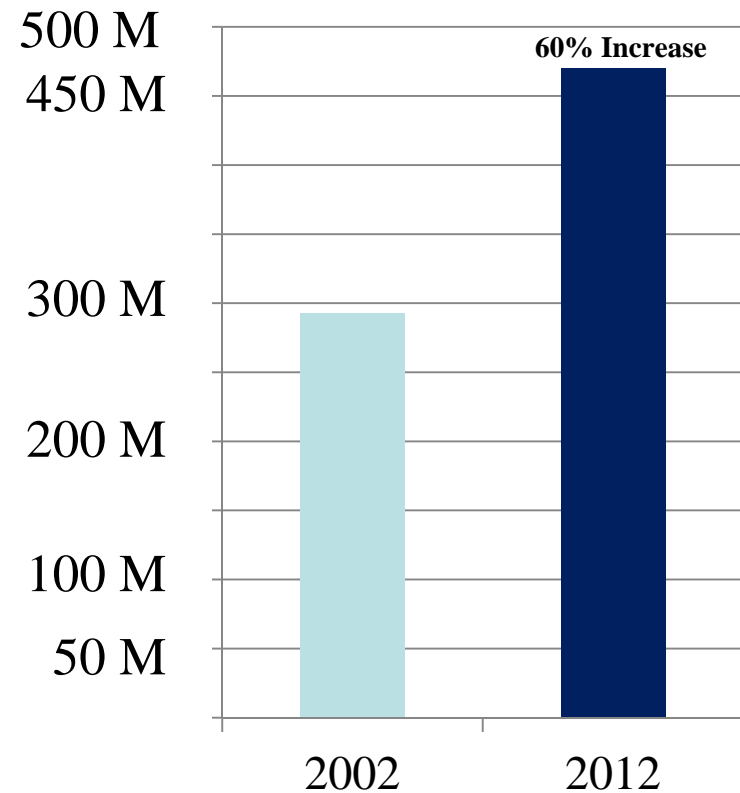
# Research Expenditures

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## All schools and colleges



## UMMS



# LEAN, Design and Implementation

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- **Cross-departmental team formed:**
  - Bottom line: we cannot continue to add additional support to meet growth
  - Philippe Sammour chosen to serve as LEAN Coach for design project – 10 post award managers identified to work on project
  - All team members attended 4-Day LEAN course
  - Mapped current process – very complex and “wasteful”
  - Assessed Post Award systems and chose MPathways Real Time Financials (RTF) Toolkit Team members will coach other departments during implementation

# Implementation Team Members

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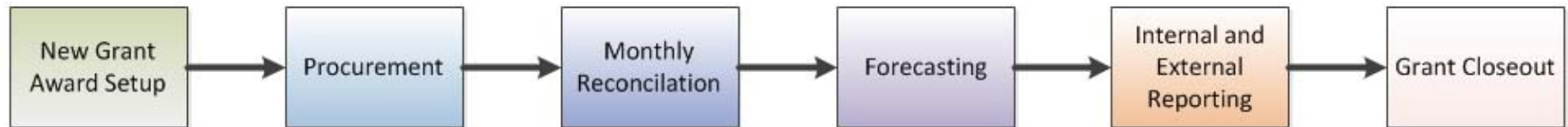
- **Linda Bailey – Radiology**
- **Elizabeth Brant – PM&R**
- **Donna Boyer – Internal Medicine**
- **David Golden – Pathology**
- **Sherry Hall – Psychiatry**
- **Emily Hamilton – Surgery**
- **Lisa Harris – ITS**
- **Melissa Karby – Cell & Developmental Biology**
- **Chad LaRue – Pediatrics**
- **Gene Napolitan – Project Manager**
- **Holly Rose - ITS**
- **Grace Sinay – Radiation Oncology**
- **Angela Suliman - Pathology**

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## LEAN Design Team Members

- **Paul Bristol – Surgery**
- **Marie Eddy – Urology**
- **Sara Hyde - Surgery**
- **Susan Vandersluis – Internal Medicine**
- **Philippe Sammour - MSA**

# Post Award Modernization Overview



**Activities and Tools:**

- Appoint Faculty/Staff
- Establish Budgets
- Subcontracts
- Unit Defined Commitments

**Activities and Tools:**

- Procurement of Lab Supplies and Equipment
- New User interface through MPathways

**Activities and Tools:**

- eReconciliation
- Unit Defined Commitments

**Activities and Tools:**

- New Forecasting Tool in Development

**Activities and Tools:**

- MReports
- New Forecasting Tool

**Activities and Tools:**

- Electronic Report Routing

# Procurement

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- **Reorganize the procurement process in Departments and Units by providing tools to PI's and Managers that will enhance the process**
  - **Paperless**
  - **Standardized/Centralized**
  - **Ordering Expert**
  - **First Time Quality**
  - **Goal to lower overall workload**



# Real Time Financials

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- **Improve financial reporting (RTF) for post award management using:**
  - **eReconciliation**
  - **Unit Defined Commitments (encumbrances)**
  - **Forecasting Tool**
  - **MReports**
  - **Partnerships – with ITS and FinOps through design and implementation**

# Proposed Timeline

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- **31 March 2013 – Procurement redesign and all proposed enhancements to RTF: eReconciliation, Unit Defined Commitments, Forecasting Tools, and MReports must be submitted to ITS.**
- **30 June 2013 – ITS will complete software enhancements for all of the above.**
- **July 2013 through September 2013 - Pilot testing by select departments/units will be initiated during this period.**
- **1 October 2013 through December 2013 – Training of all Post Award staff will begin.**
- **1 January 2014 – Implementation of the Post Award System will be activated.**

# Acknowledgement and Thanks

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- **Linda Bailey – Radiology**
- **Elizabeth Brant – PM&R**
- **Donna Boyer – Internal Medicine**
- **David Golden – Pathology**
- **Sherry Hall – Psychiatry**
- **Emily Hamilton – Surgery**
- **Lisa Harris – ITS**
- **Melissa Karby – Cell & Developmental Biology**
- **Chad LaRue – Pediatrics**
- **Gene Napolitan – Project Manager**
- **Holly Rose – ITS**
- **Philippe Sammour – Medical School Administration**
- **Grace Sinay – Radiation Oncology**
- **Angela Suliman – Pathology**