



THE UNIVERSITY
of NORTH CAROLINA
at CHAPEL HILL

Office of Sponsored Research (OSR)

TOWN HALL

February 28, 2020

Presented by:

David Paul

Assistant Vice Chancellor

OSR Leadership

Brian Bertlshofer

Director, Cost Analysis and Compliance

Jenifer Gwaltney

Director, Sponsored Projects Accounting

Jenn Teixeira

Director, Research Administration

Amanda Chang

Assistant Director, Operations

Agenda

- Effort Certification
- Operational Excellence Rollout
- PI Eligibility Policy
- SRA Training
- OSR RAFTs
- Carolina RAPIDs
- Science & Security Training
- Symposium
- Project Notification
- RAM Reports
- Q & A



Effort Certification Reminder

2020 Effort Certification Dates

Covering July 1 to December 31 - **ecrt Training**

Friday, February 14, 2020 - Pre-Review Begins

Monday, March 2, 2020 - Certification Period Begins

Tuesday, March 31, 2020 - Escalation Period Begins

Tuesday, April 30, 2020 - Certification Period Ends

Friday, May 29, 2020 - True-Ups Due in OSR's Worklist

<https://research.unc.edu/sponsored-research/train/ecrt-training/>



Operational Excellence

The goal of Operational Excellence is to create a high-functioning administrative operation that supports the University's key mission of teaching, learning and research.

Operational Excellence Team

Rick Wernoski, *Senior Vice Provost for Business Operations*

Joe Canady, *Senior Continuous Improvement Lead*

Jason Derrick, *Transformation Manager*

Sarah Elizabeth Leck, *Executive Assistant*

Mieke Lynch, *Transformation Manager*

Candace Reynolds, *Transformation Manager*

Emily Summers, *Assistant for Special Projects, Office of Chancellor*

KEY INITIATIVES

- Small-dollar spending
- SHRA and EHRA-NF hiring
- **Research award setup**
- Travel and expense
- Student employment
- Data use and literacy
- Student registration

OPERATIONAL EXCELLENCE SERVICE MODEL



Design Team

The primary OE service; used for complex operational opportunities requiring cross-cutting support



Training

Offered to schools/units seeking outside expertise on the approach and methods to solve an identified challenge



Facilitation

Offered to schools/units with an identified and clear challenge and a team in place, but requiring support around structure



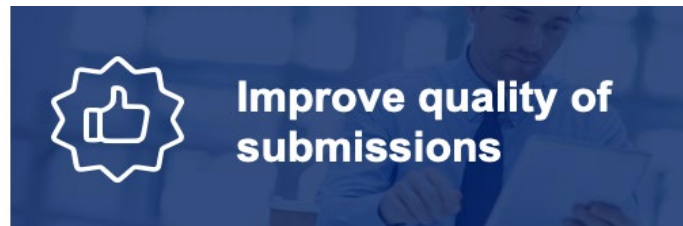
Advisory

Offered to schools/units requiring high-level advisory support on any dimension of operational improvement

Research Initiative and Solutions

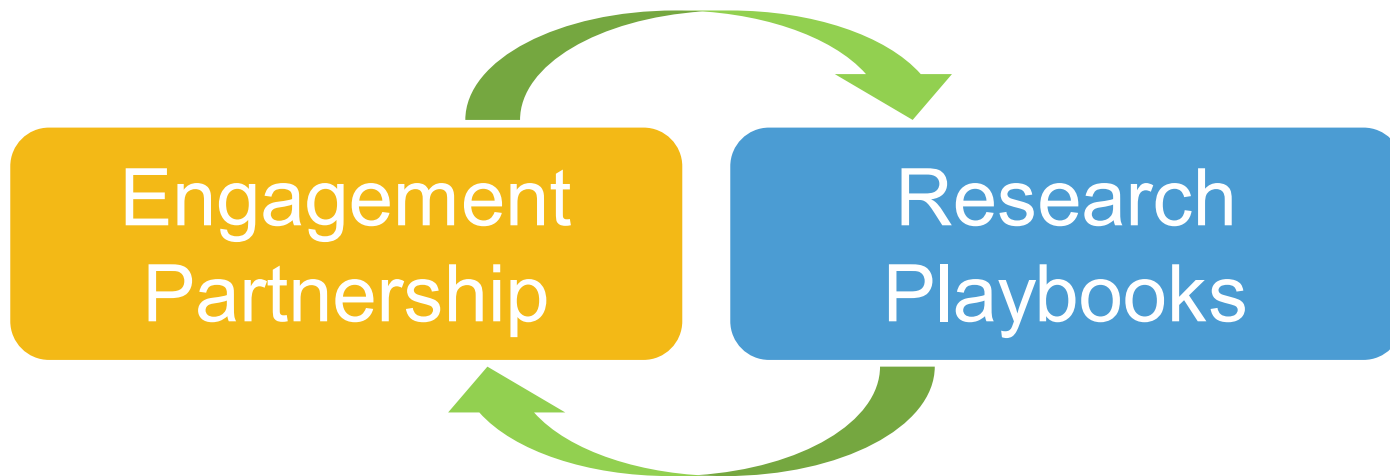
INITIATIVES

reduce award set-up



SOLUTIONS

piloted with select depts in fall 2019





Engagement Partnership

- Online **training** available
 - OSR Research Administration Teams to *develop plans of engagement* with campus partners
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Research Playbook - Proposals

- Online **training** available
- Playbook available on **OSR website**

PI Eligibility Policy

PolicyStat release in April 2020

Previously required Full Time permanent faculty appointment

Change will allow:

- 0.75 - 1.0 FTE has automatic eligibility
- 0.50 - 0.74 requires approval of Chair or Center Director
- Less than 0.50 requires approval of Dean, Chair/Director and OSR/VCR review
- Flexibility to approve PI for term of appointment instead of per proposal



SRA Training for Research Administrators



Next training workshop in May/June 2020
Details and registration coming soon



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OSR RAFTs

Research Administration Forum & Training sessions

Upcoming sessions:

- Thursday, April 23 | 1:00 – 2:15 PM
- Monday, April 27 | 11:00 – 12:15 PM

Topics:

- Closeout
- Research Playbook – Proposals

<https://research.unc.edu/sponsored-research/train/rafts/>



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Carolina RAPiDs

Research Administration Professional instructional Development system

Courses in the Foundations Core:

- Research and Regulatory Environment at UNC – *Released: Fall 2019*
- Introduction to Research Administration – *Released: Winter 2020*
- **Sponsored Projects Overview – *Spring 2020***
- Financial Concepts – *Spring 2020*
- Sponsored Projects Management – *Summer 2020*
- Subagreement Overview – *Summer 2020*
- Compliance Overview – *Fall 2020*



<https://research.unc.edu/sponsored-research/train/rapids/>



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Science & Security Training

Upcoming:

- Introduction (online) – *available soon*
- **Other Support (live webinar) – March 12, 2020**
**webinar registration released next week*

Planned topics in April and May 2020:

- Foreign Components / Progress Reports
- Disclosures
- Data / Export Controls

<https://research.unc.edu/sponsored-research/resources/science-security/>



SAVE THE DATE

Symposium for Research Administrators

Wednesday, August 12, 2020

Friday Conference Center

<https://research.unc.edu/sponsored-research/train/#trnSymposium>



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Project Notifications

former “Fund Authority”

Auto System Notifications for:

- New Awards
- Budget Revisions
- Budget/KK Date Extensions
- PI Changes
- Other Modifications



RAM Reports

Research Administration Management Reports

New tool to manage sponsored projects financials

ITS + OSR partnership and now testing w/select depts



- Available on new platform
- Easy to navigate and drill into details
- Data is 1 day prior to ConnectCarolina
- Data downloadable to excel
- Cost Share Tab

FUTURE
enhancements

A/R Tab and Direct links to transaction documents



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[Go to RAM Reports](#)

Q & A



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