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
## 2020 Effort Certification Dates
Covering July 1 to December 31 - ecrt Training

<table>
<thead>
<tr>
<th>Date</th>
<th>Event</th>
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<tbody>
<tr>
<td>Friday, February 14, 2020</td>
<td>Pre-Review Begins</td>
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<tr>
<td><strong>Monday, March 2, 2020</strong></td>
<td>Certification Period Begins</td>
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<tr>
<td>Tuesday, March 31, 2020</td>
<td>Escalation Period Begins</td>
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<tr>
<td>Tuesday, April 30, 2020</td>
<td>Certification Period Ends</td>
</tr>
<tr>
<td>Friday, May 29, 2020</td>
<td>True-Ups Due in OSR's Worklist</td>
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[https://research.unc.edu/sponsored-research/train/ecrt-training/](https://research.unc.edu/sponsored-research/train/ecrt-training/)
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

operationalexcellence.unc.edu
Research Initiative and Solutions

INITIATIVES

reduce award set-up

SOLUTIONS

piloted with select depts in fall 2019

Engagement Partnership

Research Playbooks
Next Steps – April 2020

Engagement Partnership

• Online training available
• OSR Research Administration Teams to develop plans of engagement with campus partners

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
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/
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/](https://research.unc.edu/sponsored-research/train/rapids/)
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
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

A/R Tab and Direct links to transaction documents

Go to RAM Reports
Q & A