

MEMORANDUM

Date: April 28, 2020

To: UNC Research Community

From: Robert A Blouin, Executive Vice Chancellor and Provost
Terry Magnuson, Vice Chancellor for Research

Subject: New OSR Research Tools from Operational Excellence

During the [Office of Sponsored Research \(OSR\)](#) Town Hall in February, OSR introduced their collaboration with the [Operational Excellence](#) team and [the Office of the Vice Chancellor for Research](#) on efforts to streamline the management of externally sponsored research programs at the University. Several research focused initiatives are underway: an **Engagement Partnership** to inform communications for research administration and a **Research Playbook** to provide guidance on proposal management.

The intent of this engagement partnership is to add structure to interactions between central research offices (OSR and the [Sponsored Programs Office](#)) and school/unit research administrators (RAs). The research playbook for proposals will guide RAs through the pre-award process for federal, industry (non-clinical) and nonprofit awards. These new resources will help Carolina achieve the following objectives:

- Reduce the time in award set-up
- Improve the quality of proposal submissions
- Reduce department response time

Over the past year, Operational Excellence playbooks have had a positive impact in eleven campus units where they have been piloted. The success of this work will build momentum for the University's new Strategic Plan, [carolinanext.unc.edu]*Carolina Next: Innovations for Public Good*.

The research playbook for proposals will soon be available on the OSR [website](#) to be followed by online training. For those of you involved with the management of sponsored programs, please be on the lookout for a forthcoming email communication directly from OSR that will include more details. Once the resources are available, we seek your assistance with:

- Reviewing the training materials
- Using the new resources and encouraging your fellow RAs to do the same
- As a manager who leads research administration efforts, recognizing early wins by thanking your team members who are using these new methods effectively

Please keep us updated on your experience and let us know what more we can do to ensure the success of this initiative by contacting Senior Vice Provost for Business Operations [Rick Wernoski](#) and Senior Associate Vice Chancellor for Research [Andy Johns](#). You can also submit comments via the Operational Excellence [feedback form](#). Thank you for your help and engagement in these operational improvements.