

## RESEARCH SUITE IMPLEMENTATION

KICKOFF MEETING

April 26, 2021



# AGENDA

**Introductions**

**Current State & Plan for Change**

**Grants & Agreements Implementation**

**Next Steps**

# INTRODUCTIONS



## THE TEAM

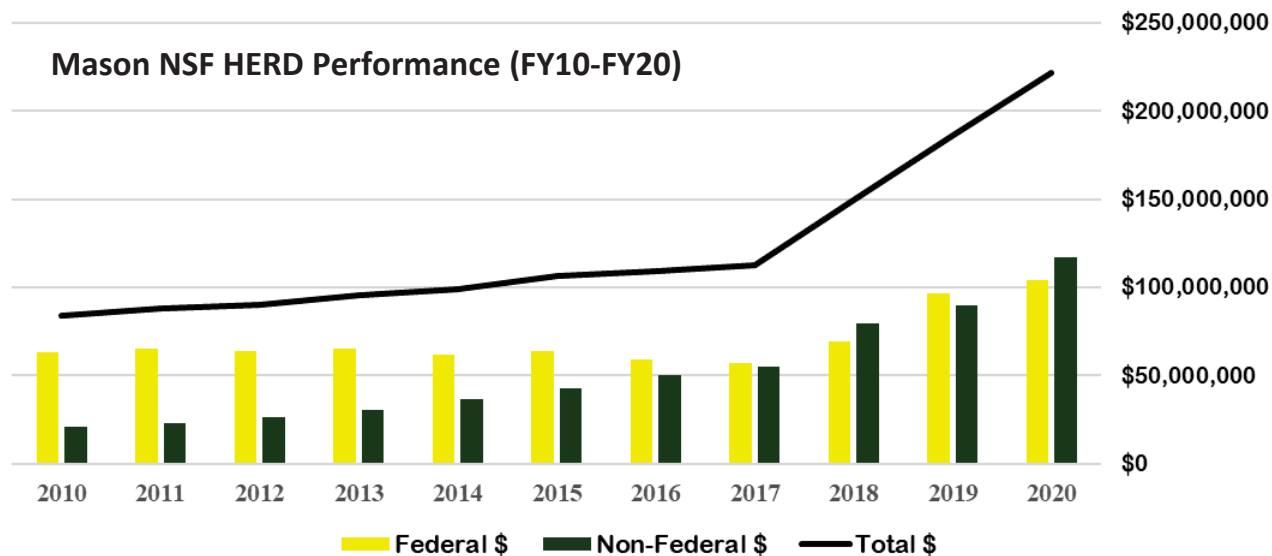
<b>Executive Sponsors</b>	<p><b>Kevin Borek</b>, VP of Information Technology and CIO</p> <p><b>Aurali Dade</b>, Interim VP for Research Innovation and Economic Impact</p> <p><b>Deb Dickenson</b>, VP for Finance</p>	<p><b>Mike Laskofski</b>, Assoc. VP, Research Services</p> <p><b>Charlie Spann</b>, Deputy CIO &amp; Assistant VP, Enterprise Service Delivery</p> <p><b>Rose Higgins</b>, Associate Dean for Research, CHHS</p>
<b>Project Leadership Team</b>	<p><b>Margaret Ewell</b>, Assoc. Dir., Proposal &amp; Award Mgmt</p> <p><b>Amanda Fucci-Bartoszek</b>, Assoc. Dir., Research Admin</p> <p><b>Rebecca Hartley</b>, AVP, ORIA</p> <p><b>Kim Jervey</b>, Assoc. Dir., Contracts in OSP</p>	<p><b>Mike Laskofski</b>, AVP, Research Services</p> <p><b>Andie Powell</b>, Project Manager, Info Technology</p> <p><b>Joe Taylor</b>, Huron, Managing Director</p> <p><b>David Tubis</b>, Huron, Director</p>
<b>Core Grants &amp; Agreements Implementation Team</b>	<p><b>Kevin Brooks</b></p> <p><b>Joanne Carter</b></p> <p><b>Janice Cohen</b></p> <p><b>Maggie Ewell</b></p> <p><b>Judy Fortin</b></p> <p><b>Jennifer Fortney</b></p> <p><b>Amanda Fucci-Bartoczek</b></p> <p><b>Jessica Guzzo</b></p> <p><b>Roopa Hemanth</b></p> <p><b>Kim Jervey</b></p>	<p><b>Mike Laskofski</b></p> <p><b>Kimberly Maze</b></p> <p><b>Megan Nykamp</b></p> <p><b>Andie Powell</b></p> <p><b>Angie Railey</b></p> <p><b>Andrew Sprecher</b></p> <p><b>Amir Tofighi</b></p> <p><b>David Tubis</b></p>

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**CURRENT STATE &  
PLAN FOR CHANGE**

## GEORGE MASON'S RESEARCH ENTERPRISE

- As research activity at Mason has increased, the procedural and technical capabilities to support the research enterprise become increasingly important. There is an increased scrutiny from funders and audit exposure as the level of research increases.
- The current systems are not integrated, many are outdated, currently at their capacity, and are not sustainable.
- Shadow systems, paper forms, and duplicate data entry increases the opportunity for errors and creates inefficient and ineffective processes. Centralized data will enable improved reporting capabilities for data driven decision making.
- Mason needs a scalable, pre-award, non-financial post-award, and regulatory and research compliance software system to replace some existing systems and work-around processes.

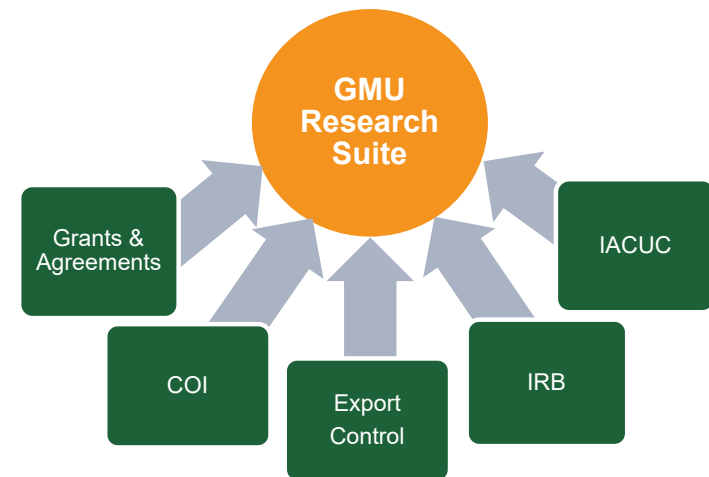


**NSF HIGHER EDUCATION SURVEY RANKINGS 2019 (over FY 2018)**  
 - Total Research: 122 (Up 11)  
 - Federal Research: 114 (Up 20)

## READINESS ASSESSMENT COMPLETED

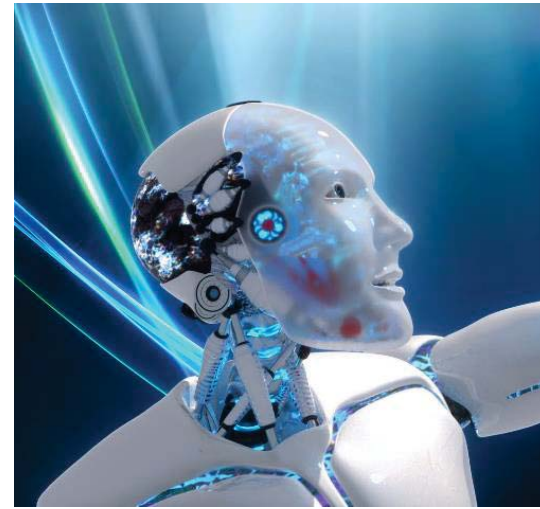
The Office of Research completed a readiness assessment of the Huron Research Suite, a “Software as Service” (SaaS) web-based system, to outline a detailed plan for a successful deployment.

- ✓ Reviewed Mason’s current business processes against the Huron Research Suite modules: Grants, Agreements, COI, Export Control, IRB, and IACUC.
- ✓ Reviewed the settings and extension capabilities provided in the research suite applications to minimize customizations and provide flexibility with business process decisions.
- ✓ Identified technical/integration needs to support required data importing/exporting/maintenance/reporting for the Research Suite.
- ✓ Outlined data conversion strategies for each solution.
- ✓ Provided an implementation approach and timeline.



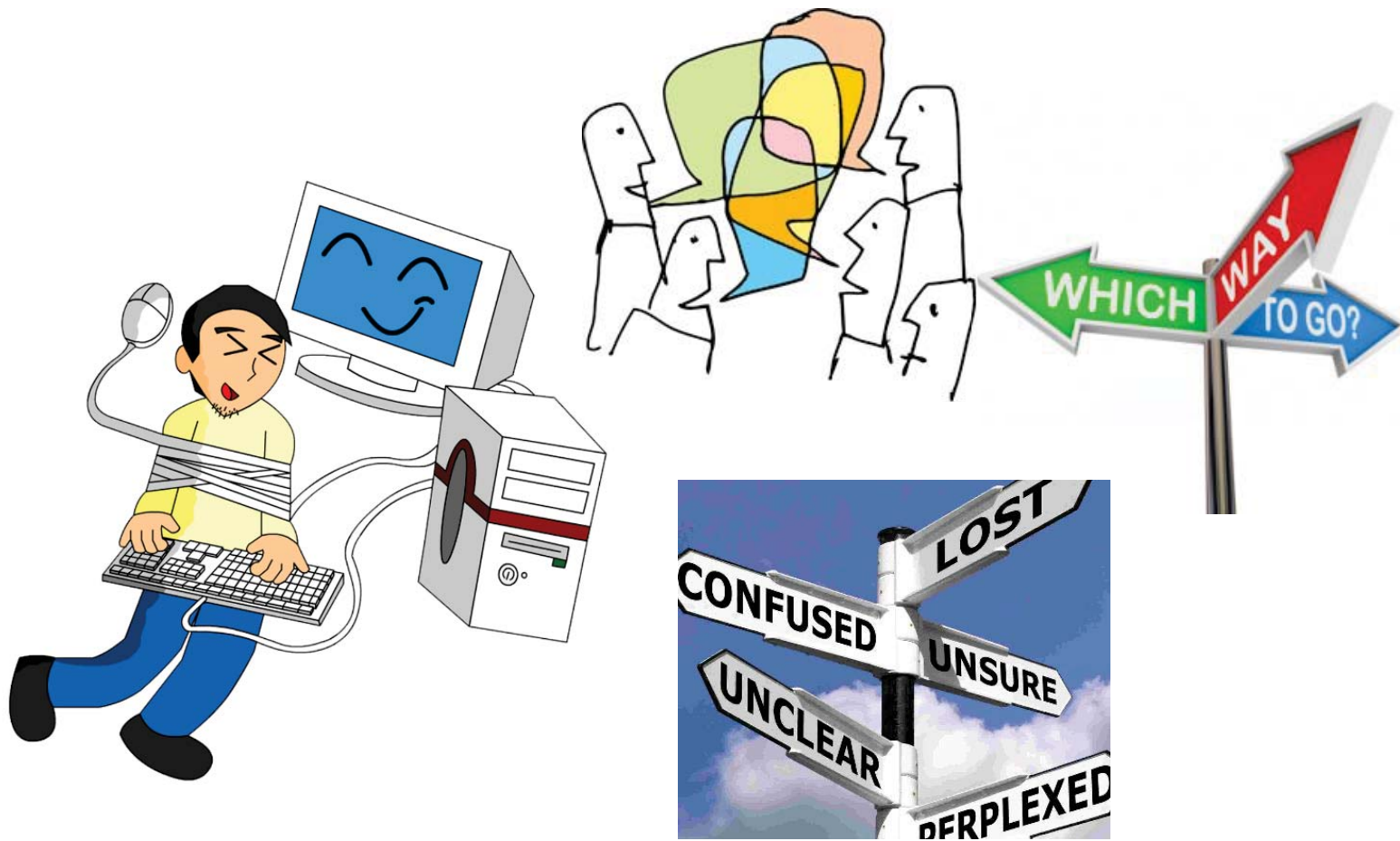
**Assessment reviewed with Mason Executive Leadership; Implementation Phase approved to begin!**

WHAT WE ARE TRYING TO DO





## WHAT WE DON'T WANT TO DO

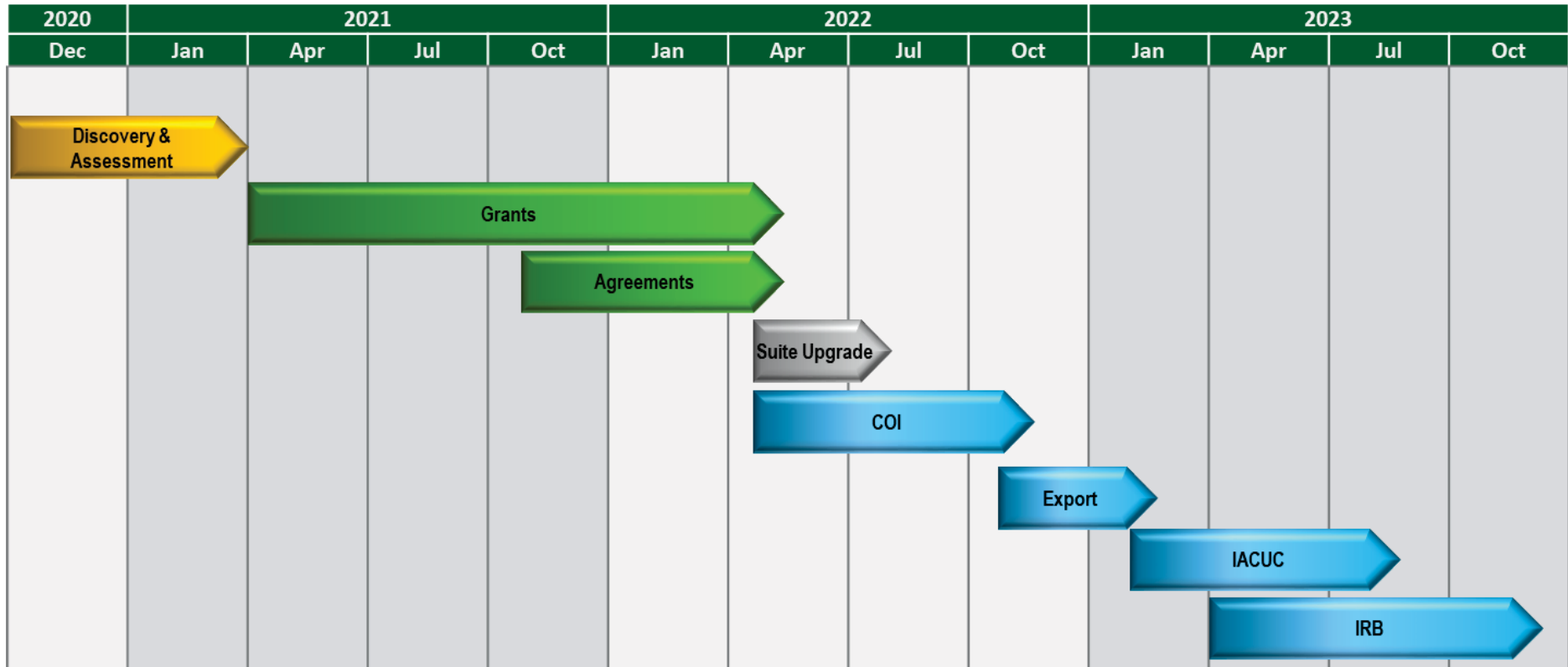


## BENEFITS OF A NEW RESEARCH SUITE

### What are the anticipated benefits of the new research suite?

- **One platform** for Mason's research applications
- Workflow **transparency** to easily see the status of a record, who has it, and the next steps
- **Dynamic SmartForms** only request required data and include validations (S2S with pre-validations, Hide-Show Functionality, etc.)
- Intuitive and **security-based workflow** to support a distributed proposal submission process
- **Integration** with existing operational systems
- Enables **better reporting** to assist with decision making

## RESEARCH SUITE IMPLEMENTATION TIMELINE



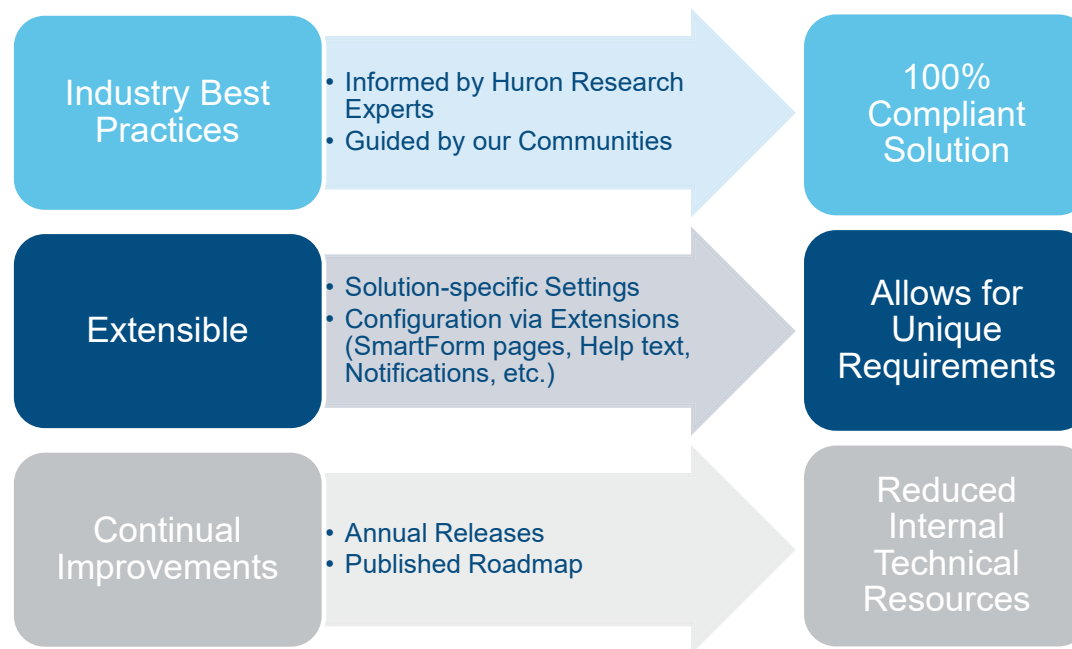
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**GRANTS &  
AGREEMENTS  
IMPLEMENTATION**

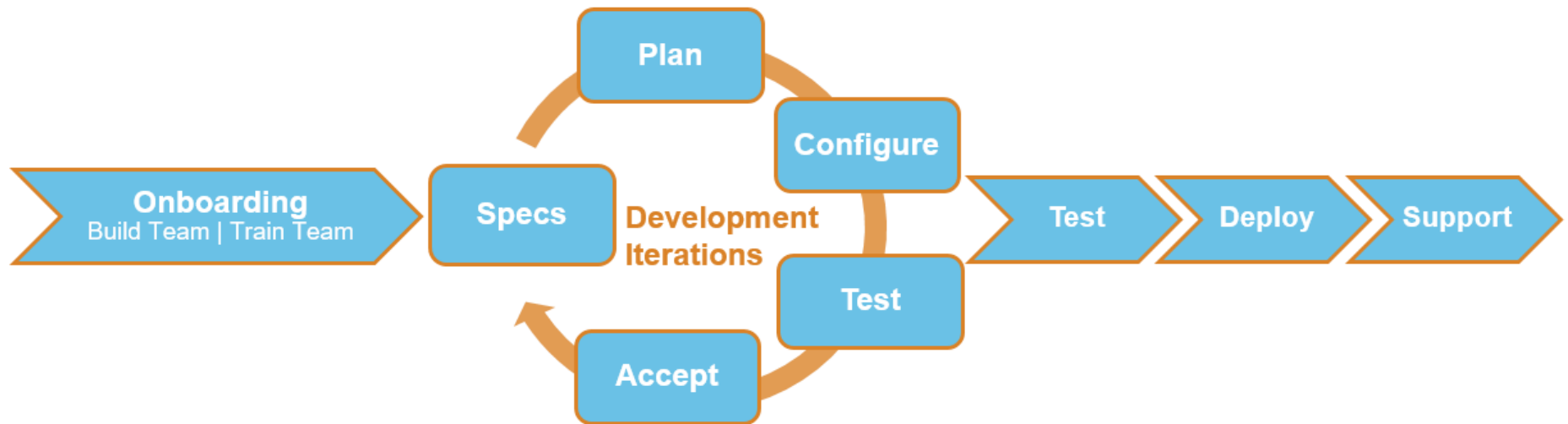
## IMPLEMENTATION GOALS & OBJECTIVES

Huron and George Mason will work together to implement the Grants & Agreements modules keeping the following in mind:

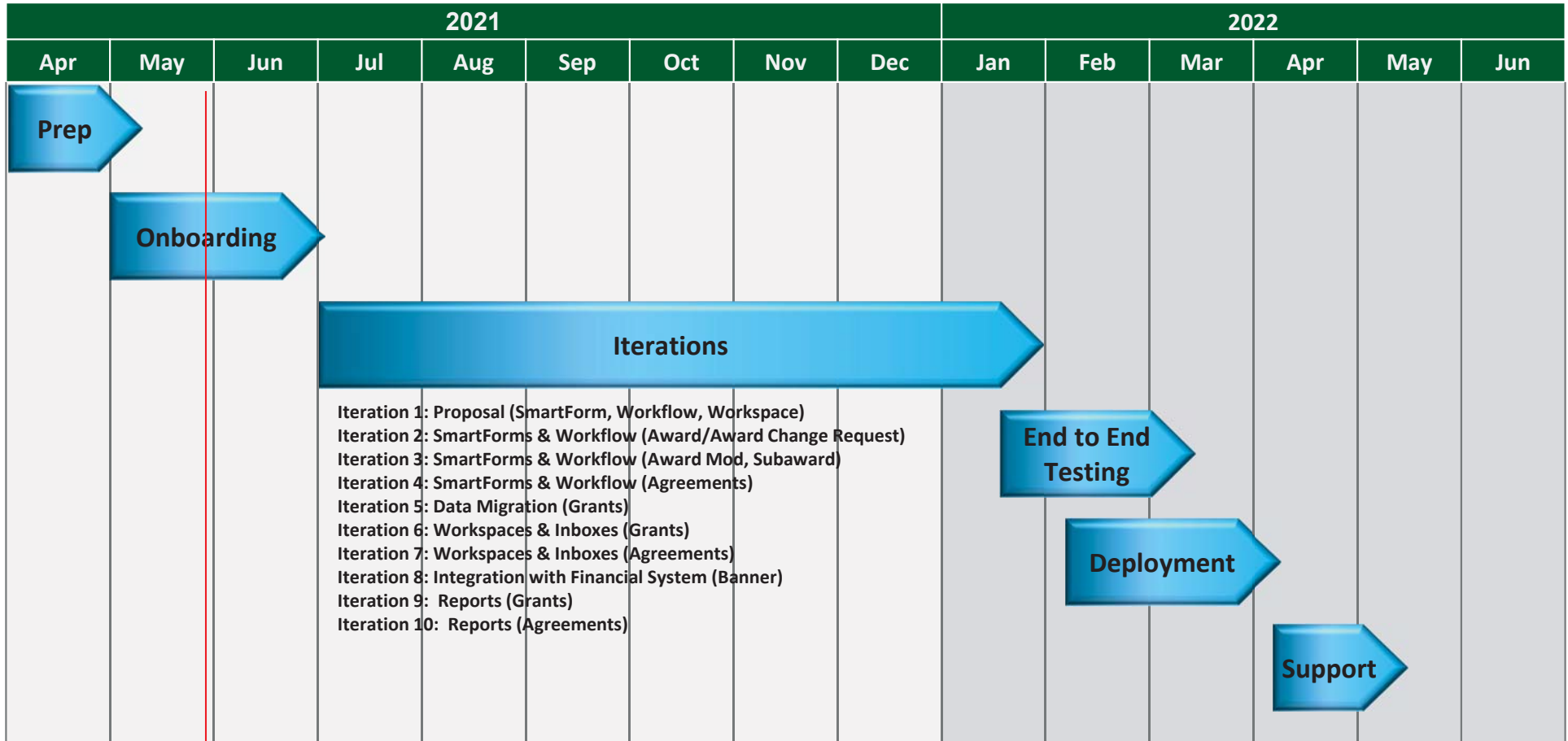
- Deploy software to support research administration with **limited customizations**
- **Leverage best practices** delivered within software and maintain upgrade path
- **Limit long-term cost** of ownership



## HURON IMPLEMENTATION METHODOLOGY



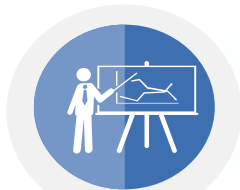
## GRANTS & AGREEMENTS IMPLEMENTATION TIMELINE



# NEXT STEPS



### GMU Grants & Agreements Onboarding: May 3 – June 25



Huron SME provides *Core Grants & Agreements Implementation Team* “**deep dive**” training on the software covering all the product capabilities and **building draft plan**



**Hands-On simulations** for the *Core Grants & Agreements Implementation Team*, ensuring full understanding of all **business use cases** and identification of gaps



Enumerate **all identified gaps** and decide if they will be addressed via **process change** or **software change**



*Core Grants & Agreements Implementation Team* demonstrations for **project leadership and Stakeholders**. Finalize all scope decisions and get **Executive Sponsors Project approval** of plan

## READINESS CHANGE ASSESSMENT QUESTIONNAIRE

### Project Team will be sending out a Readiness Change Assessment Questionnaire

- Provides insight into Mason's history of change
- Level of readiness for change related to the Research Suite Implementation
- Share valuable feedback by completing the Change Readiness Assessment
- Helps identify risk areas and develop mitigation plans for the successful adoption of the new Research Suite

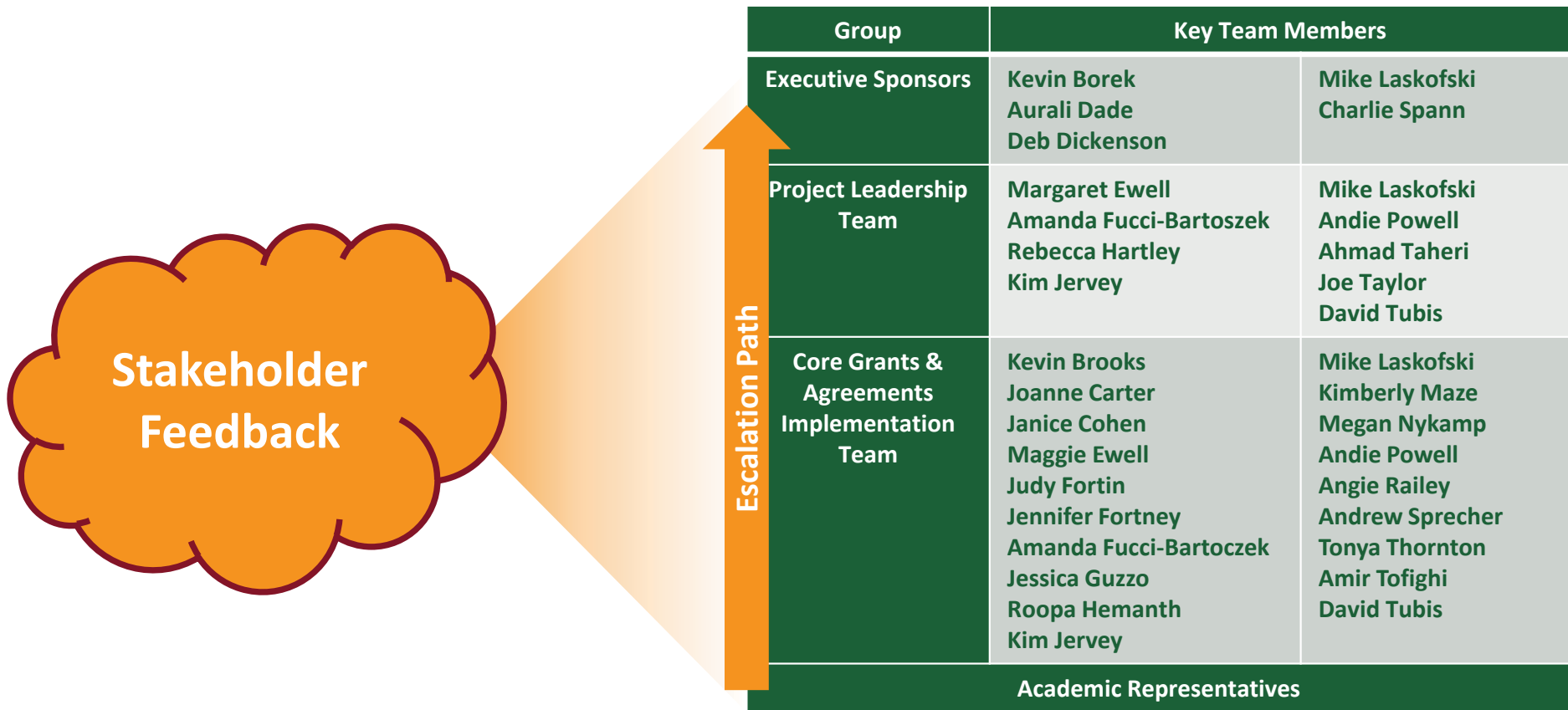


**Please Complete by Friday, May 7th**

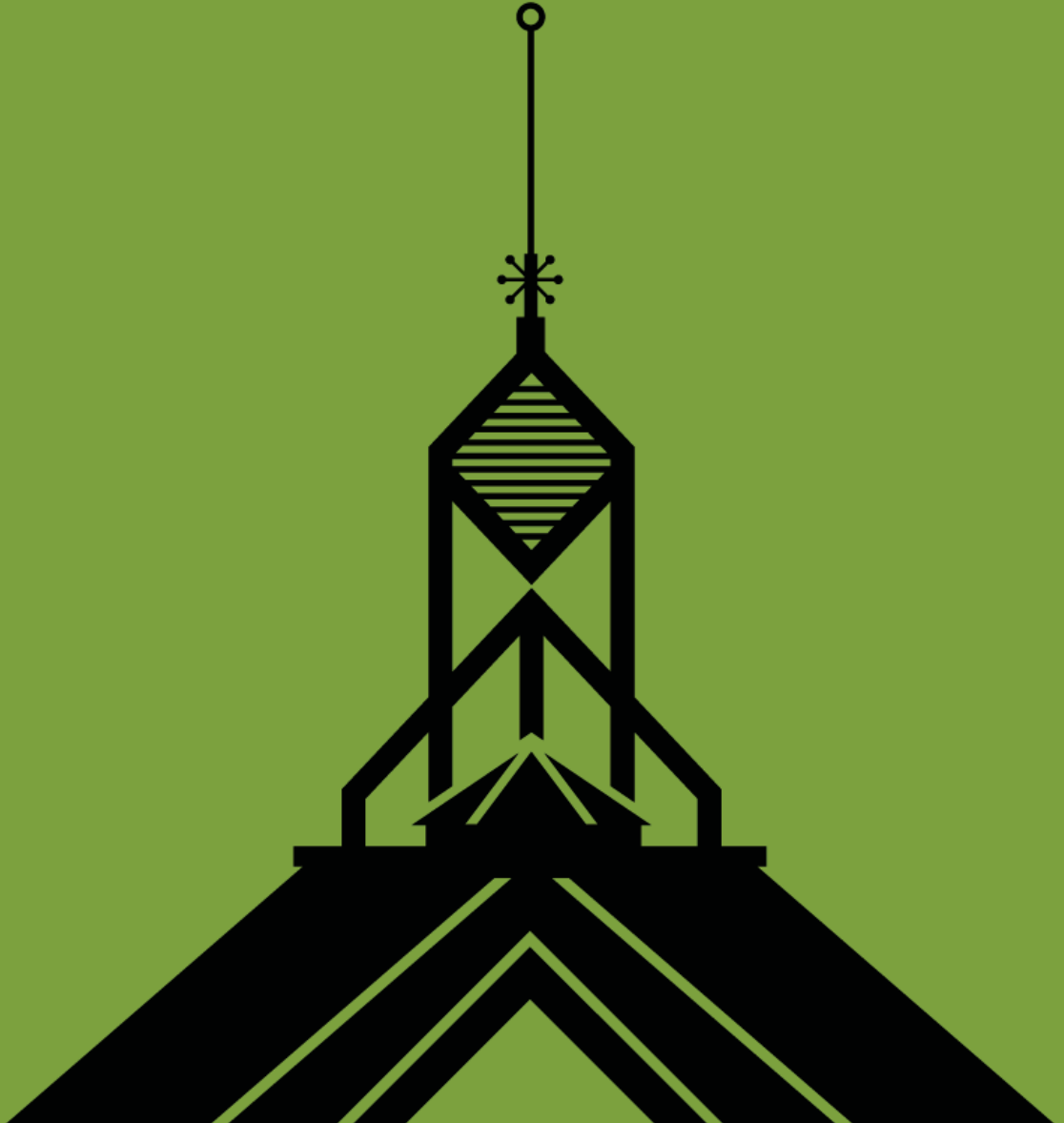
## COMMUNICATION PLAN

Stakeholder (Who)	Message (What/Why)		Format (How)	Frequency (When)
Project Executive Sponsors	✓	Update on policy, procedure and strategy	✓ Buy-In and Support	✓ Quarterly
	✓		✓ Meeting – Presentation	✓ Monthly
Project Planning Team	✓	Recap task/activities over past week	✓ Issues to be addressed/discussed	✓ Weekly
	✓	Planned activities for coming week	✓ Actions/Follow-up	
Project Leadership Team	✓	Review project plan and progress	✓ Review closed and upcoming actions	✓ As Needed
	✓	Discuss issues and risks		
Core Grants/Agreements Implementation Team	✓	Review project progress	✓ Plan for implementation/roll-out	✓ Bi-Weekly
	✓	Discuss system configurations		✓ As Needed
ITS Team/Resources	✓	Update on project plan/progress	✓ Understand timing of tasks	✓ As Needed
	✓	Understand role/ requirements		
Provost and Deans	✓	Information about the Project and Plan	✓ Buy-In and Support	✓ Bi-Annually
Research Council	✓	Guidance during implementation	✓ Buy-in and support	✓ Quarterly
	✓	Changes in business processes	✓ Specific Requests (e.g. reports feedback, etc.)	✓ As Needed
OSP Advisory Group	✓	Guidance during implementation	✓ Buy-in and support	✓ Monthly
	✓	Changes in business processes	✓ Specific Requests (e.g. reports feedback, etc.)	✓ As Needed
Academic Reps	✓	Project information	✓ Buy-in support	✓ As Needed
Faculty	✓	Project information	✓ Buy-in support	✓ As Needed
Research Services	✓	Information about the project	✓ Changes in business processes	✓ Monthly
	✓	Implementation plans – timing and activities	✓ Buy-In support	✓ As Needed
			✓ Email Communications	
ITS PPMO	✓	Update the official record on project status	✓ EPMO	✓ Bi-Weekly
			✓ Website Updates	

## FEEDBACK AND ESCALATION



QUESTIONS?



# APPENDIX



## GRANTS & AGREEMENTS SCOPE

### In Scope

- Onboarding (training and planning activities) of the core project team
- Configuration of the Grants and Agreements solution per a mutually agreed upon set of requirements
- Single Sign-On Integration
- Banner Integration
  - Persons and Organizations (Departments and Sponsors)
  - Flat File integration for Initial Award Setup and Modifications
- Data conversion of Submitted Grant Funding Proposal and Active Grant Awards (legacy data to populate C&P report)
- Integration within Huron Solutions
  - Common persons and organizations
  - Common navigation
  - Common inbox
  - Cross referencing of Grants and Agreements Records
- Agreement DocuSign Integration

### Out of Scope

- Integration with other 3<sup>rd</sup> party system not specified
- Data Migration of documents, proposals not yet submitted, closed/inactive awards, and Agreement records or documents
- Additional advanced reports and analytics
- Creation of ETL to populate data warehouse
- Expanding SF424 mapping
- Use of Complex Proposal (MPP)