PURE Efficiency

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#pcrn2018

October 31 – November 1 2018

Philadelphia
Where are we?
About Monash
Established 1958

Students
- Domestic 44,690
- International 22,859
- Offshore 10,708

78,257

Staff
- Academic 3,689 FTE
- Academic unit & support staff 2,953 FTE
- General institution and other services 1,278 FTE
- Student Services 440 FTE
8,360 FTE
Research

4 Australian Campuses
3 Teaching Hospitals – Translational Research

Research Income - AU$342 Million/annum

10 Faculties

Arts
Art and Design
Business and Economics
Education
Engineering
Information Technology
Law
Medicine, Nursing & Health Sciences
Pharmacy
Science
Global Rankings

Monash’s international recognition ranks it in the **TOP 1%** of universities worldwide

Monash University is ranked in the top 100 of universities on a number of measures:

- Top 1% of universities worldwide according to Times Higher Education World Rankings (2017-2018)
- #21 World’s Most International Universities Times Higher Education 2017
- #1 Australia, #28 Asia – Reuters Top 75
- #56 NTU Ranking 2018 (Performance Ranking of Scientific Papers of World Universities)
- #57 Global Universities Graduate Employability Ranking 2017)
- #60 QS World University Rankings 2017-2018
- #68 US News World Rankings 2017-2018
- #80 Times Higher Education World Rankings 2017-2018
- #91 Academic Ranking of World Universities
Benchmarking

Ranked in the top 50 (QS World University Rankings by subject 2018) in the world for subjects including:

#2 Pharmacy and Pharmacology
#14 Education
#18 Nursing
#22 Performing Arts
#23 Accounting and Finance
#24 Chemical Engineering
#24 Anatomy and Physiology
#26 Law
#29 Business
#29 Medicine

The number of publications that, compared with other publications in the same field and in the same year, belong to the top 10% most frequently cited

Source: Lieden - 2018
Why Pure Awards Management Module

Where we were coming from: Challenges

• Client – Server research administration system
  • Data held centrally and not accessible to the people who needed it.
• Multiple systems built on to meet needs.
• Multiple spreadsheets to track activities.
• Paper based information gathering
• Data entry completed post event
  • Data integrity questionable
• Data collected in multiple systems – devolved.
• Communications outside of system – multiple email role accounts/personal accounts/phone
• Duplication of business processes/data collection
Business Process - Applications

- **Researcher**
  - Signals intention to submit
  - Adds detail to proposal in Pure
  - Early visibility of proposals wanting grant development support or proposals seeking funding contributions

- **Faculty supports development of proposal**
  - Support available from R&R/MRO/Faculty etc. on request

- **Accesses support information website**
  - Tips
  - Dates
  - Rules
  - Costing model
  - Information
  - Contacts

- **Develops draft**

- **Requests peer review**
  - Peer Review

- **Costs the project using online tool**

Next slide
Business Process – Applications

Researcher

Prepares application in funder’s system

Completes proposal in Pure and attaches documents

Workflows proposal in Pure to Research Office for compliance check

Obtains necessary certifications

RO checks application and provides feedback

Submits application to funder

Faculty Approves

Provost or delegate approves
Client-Server

Before

After

• Was 20-30 Users, now 200+ admin & all academics
• Visibility by relevant staff – Pure Roles
  • Data Integrity
Coversheet

Before

After

- Data only entered once – can add as it’s available
- Saveable
- Known data from other systems
- Reduced amount of information requested
- Visibility by relevant staff – Pure Roles
Data live – everyone is looking at the same data
No double entry – data integrity
Flexibility to see what’s relevant to individual
Visibility by relevant staff – Pure Roles
Copies of Applications from funder system

### Before

- **Application**
  - *Bacterial metabolite mediated regulation of the immune and metabolic systems*
    - **Funder**
    - National Health & Medical Research Council (NH&MRC)
    - **Funder Ref.**
    - L1148476
  - **Funder**
  - **Funder Ref.**
  - **Funder**
  - **Funder Ref.**
  - **Funder**
  - **Funder Ref.**

### After

- **Application**
  - *Enhancing joint replacement outcomes through national data linkage*  
    - **Funder**
    - **Funder Ref.**
    - **Funder**
    - **Funder Ref.**
  - **Application**
  - **Funder**
  - **Funder Ref.**
  - **Funder**
  - **Funder Ref.**

### Details

- **Cost Codes**
  - **Application approval route**
  - **Funder**
  - **Funder Ref.**
  - **Funder**
  - **Funder Ref.**
  - **Funder**
  - **Funder Ref.**

### Notes

- All records in one secure (soft) location
- Access to all who authorised users, including researcher
Business Process Visibility

Before

• Visibility by relevant staff (Pure Roles) of progress of all matters.
Before Approval Process

- Visibility by relevant staff (Pure Roles)
- Access to all relevant documents
- Electronic approval short circuits logistical/geographic challenges
- Electronic approval facilitates ease of approval
Before

• Communications all in one spot
  • avoiding cc’ing everyone/visibility of others comms
  • don’t lose trial when person leaves
  • history in one spot –with application record
• System notification to emails when notifications are created.

After

- System notification to emails when notifications are created.

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### Important Note for CI

The Chief Investigator (CI) must seek agreement from other Chief Investigators (CIs) (if any) named on the application. The CI will need to provide written consent (e.g., via email) to the MOE of all CIs before the application can be submitted to the NHMRC. The CI should replace all consent emails from CIs and forward to the Monash Research Office with the final version of their application.
Business Process Awards

- Accept grant/fellowship
  - Liaise with central admin
  - Funds awarded or contract executed

- Create Pure award:
  - $ amount
  - Milestones

- Adjusted budget set up in Metis

- Milestone triggers alert
  - Report to funding body
  - Initiate variations

- Manage project expenditure
  - Action variation request
  - Issue invoices

- View award and manage milestones

- Milestone triggers alert
  - Liaise with researcher

- View award and manage milestones

- Report to funding body

- Initiate variations

- Manage project expenditure

- Milestone triggers alert

- Liaise with researcher

- Issue invoices

- Close funds

- Submit final report

- Pure award updated for project close

- Conclude research project

- Conclude research project

- Close funds

- Pure award updated for project close
Before

- Previously took 4 weeks to enter all data for detailed reporting
- No Data ready within 24 hours.
- Award records created within 24 hours
- Funding Acceptance packages sent out within 48 – 72 hours.
- Faculty reports available within 24 hours
  - Normally sooner.

After

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- Funding Acceptance packages sent out within 48 – 72 hours.
- Faculty reports available within 24 hours
  - Normally sooner.
Before

**Milestones**

- Milestone created at the time of award creation
- Views/notifications for researchers
- Dashboards for Research Administrators/Finance

After

**Award record**

- In 20 days milestone
- Survey completion date
- In 34 days 2/20/16
- Data collection interviews/interest groups at 3/6 sites
- In 56 days 1/2/16
- Interim report
- In 103 days 1/30/16
- Data collection interviews/interest groups at 3 sites
- In 135 days 4/15/16
- Final report
- In 135 days 4/15/16
- Run – Invoice Milestone (final report)

**Researcher Personal Overview**

- The role of osteoclasts in regulating type II interferon production
- Understanding the genetics of blood cells and blood cell disorders

**Dashboards for Research Administrators**

- Award record
- Researcher Personal Overview
- Milestones
- In 20 days milestone
- Survey completion date
- In 34 days 2/20/16
- Data collection interviews/interest groups at 3/6 sites
- In 56 days 1/2/16
- Interim report
- In 103 days 1/30/16
- Data collection interviews/interest groups at 3 sites
- In 135 days 4/15/16
- Final report
- In 135 days 4/15/16
- Run – Invoice Milestone (final report)
### Fund Creation

#### Before

- Previously – 2 weeks -> Now – within 24 hrs
- Visibility for all approved users
- Notifications to relevant users

#### After

- Engaging new generations learners – working towards confident delivery of [Award Grant]

**Types and status**

**Award type**
- Grant · Award

**Status**
- Internally approved

No status set
- In contract negotiation
- Internally approved
- Terminated

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<table>
<thead>
<tr>
<th>Date</th>
<th>ID</th>
<th>Award Type</th>
<th>Title</th>
<th>Organisation</th>
<th>Category</th>
</tr>
</thead>
<tbody>
<tr>
<td>05/08/18</td>
<td>213844/1</td>
<td>Grant · Award</td>
<td>Development of Device Technology for High-End Research in the Medical and Science Field</td>
<td>Monash University</td>
<td>Category 1: Australia</td>
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<tr>
<td>10/08/18</td>
<td>213844/2</td>
<td>Grant · Award</td>
<td>Development of a Medical Device</td>
<td>Monash University</td>
<td>Category 1: Australia</td>
</tr>
<tr>
<td>15/08/18</td>
<td>213844/3</td>
<td>Grant · Award</td>
<td>Development of Medical Device</td>
<td>Monash University</td>
<td>Category 1: Australia</td>
</tr>
</tbody>
</table>

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**Edit Budget...**

<table>
<thead>
<tr>
<th>Organisation</th>
<th>Cost Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>Microbiology</td>
<td>3194612</td>
</tr>
</tbody>
</table>
Summary of Benefits

For researchers

 Visibility of researcher information

 Single point of access to information and web-based system

 Savable semi-populated forms

 Milestones recorded with automated reminders

 Grants, contracts and outputs display automatically on profile and CV - prizes, distinctions and other achievements can also be captured

For the institution

 Electronic workflow for internal approvals eliminating paper processes

 Single repository holding all relevant documents

 Visibility of org-level grant & contract activity that enables proactive support

 Identify links between projects, awards, equipment and outputs

 Ability to easily populate our BI data lake with Pure’s use of web based services

 Reduced manual effort in managing publication data collection and milestone management and invoicing

 Timely establishment of research funds

 Accessible reporting for Academic Promotion and Performance development meetings
How did we do it?
# Strong vision

### Vision

To enable achievement of the University’s research aspirations by providing outstanding research management support services.

### Mission

We partner with the research community by providing professional research management and support services which are customer focused, responsive, integrated and innovative.

<table>
<thead>
<tr>
<th>Values</th>
<th>Goals</th>
<th>Measures</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Be customer centric and committed to achieving outcomes (go beyond completion of tasks)</td>
<td>• Remove silos, both in terms of how we operate and how we are organised</td>
<td>• Contribution to achievement of research objectives</td>
</tr>
<tr>
<td>• Be accountable for our services and strive for continuous improvement to the benefit of the University as a whole</td>
<td>• Work in partnership with our researchers, forging mutual respect and holding each other accountable for our respective responsibilities</td>
<td>• Customer satisfaction</td>
</tr>
<tr>
<td>• Embrace teamwork and forge trusted relationships with researchers</td>
<td>• Professional staff possess the capabilities and capacity that are needed across the University</td>
<td>• Efficiency</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Effectiveness / responsiveness</td>
</tr>
</tbody>
</table>
People

Professional staff
Greater ability to provide the best quality support to researchers

By shifting people from transactional administrative tasks …

… to value-add research development and support activities
Process

Researchers completes proposal in Pure and attaches documents.

Workflows proposal in Pure to Research Office for compliance check.

Prepares application in funder’s system.

Obtains necessary certifications.

Faculty approves.

RO checks application and provides feedback.

Provost or delegate approves.

Submits application to funder.

Submits application to funder.
By shifting from isolated and disparate information systems and processes …

… to a single information platform with aligned business processes that drive operational efficiencies
Challenges

Time
Senior support
Clear need
Simplify
Challenges – academic users
Challenges – reimagine how

http://meetcontent.com/blog/reimagine-content-in-higher-education/
Factors for success
2+ years on
Questions and discussion

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