



# ABA Meeting

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## Office of Contract & Grant Administration

*Linda Collins – Director/AVC, OCGA*

*Lisa Meredith – Associate Director, OCGA*

*Ross Dammann – Manager, Business Systems & Strategy, OCGA*

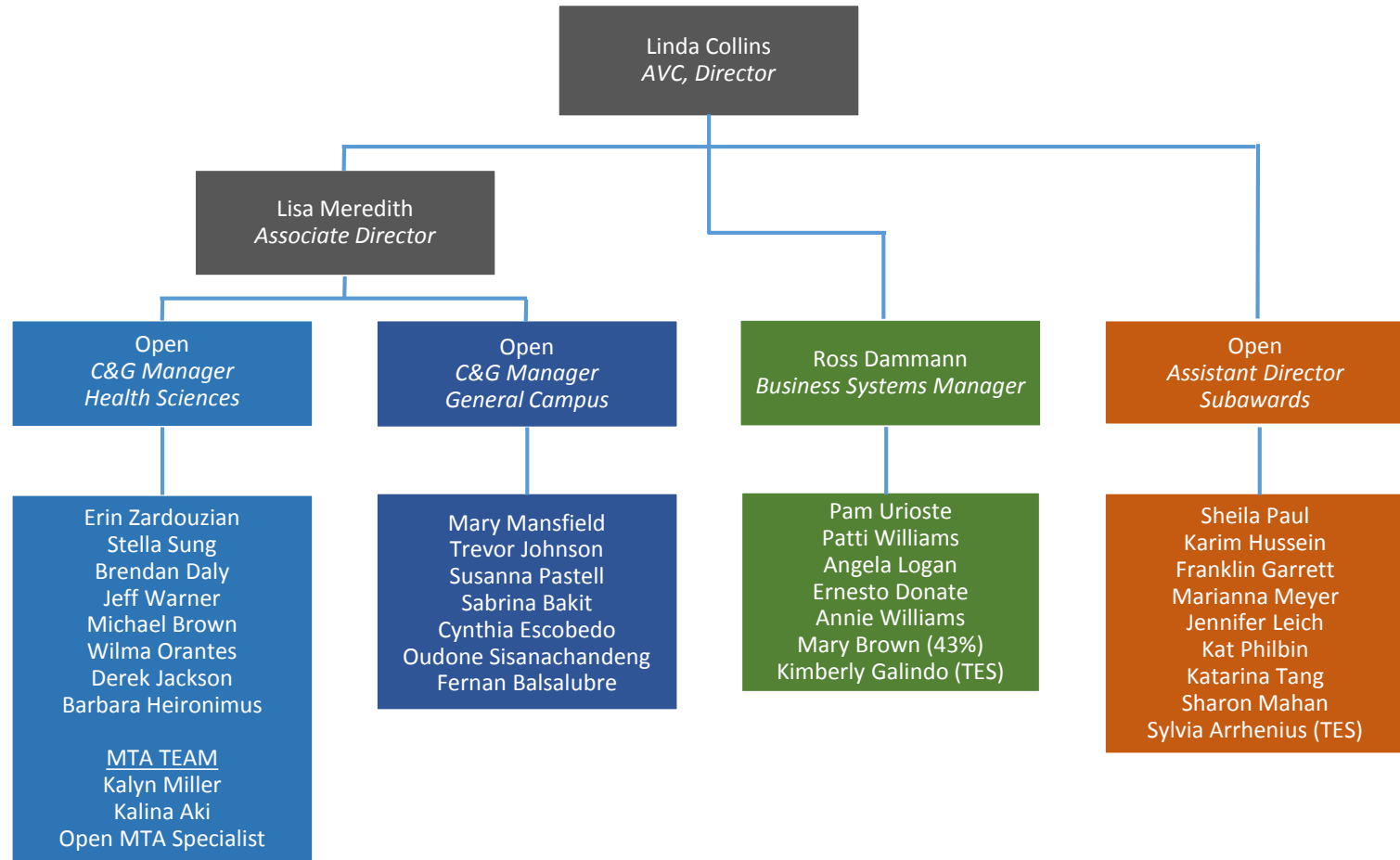
December 6, 2016

# Agenda

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- **OCGA – New Faces for the Future!**
  - Updated Organization Structure
  - Mission
- OCGA Improving our Service – Changing the way we assign work and service departments
  - What is the new OCGA Department Service Model?
  - What is the expected impact of the new model for departments?
  - When will the new model be effective?
- Discussion
  - Communication & Outreach
  - Timely Proposal Submissions

# OCGA Updated Organizational Chart



# OCGA Mission

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The Office of Contract and Grant Administration (OCGA) serves our valued research community with high quality expertise in support of sponsored research proposal and award administration. We commit to deliver timely, effective, and welcoming services through personal interactions and automated processes, and to ensure that UC San Diego's contract and grant process is best in class.

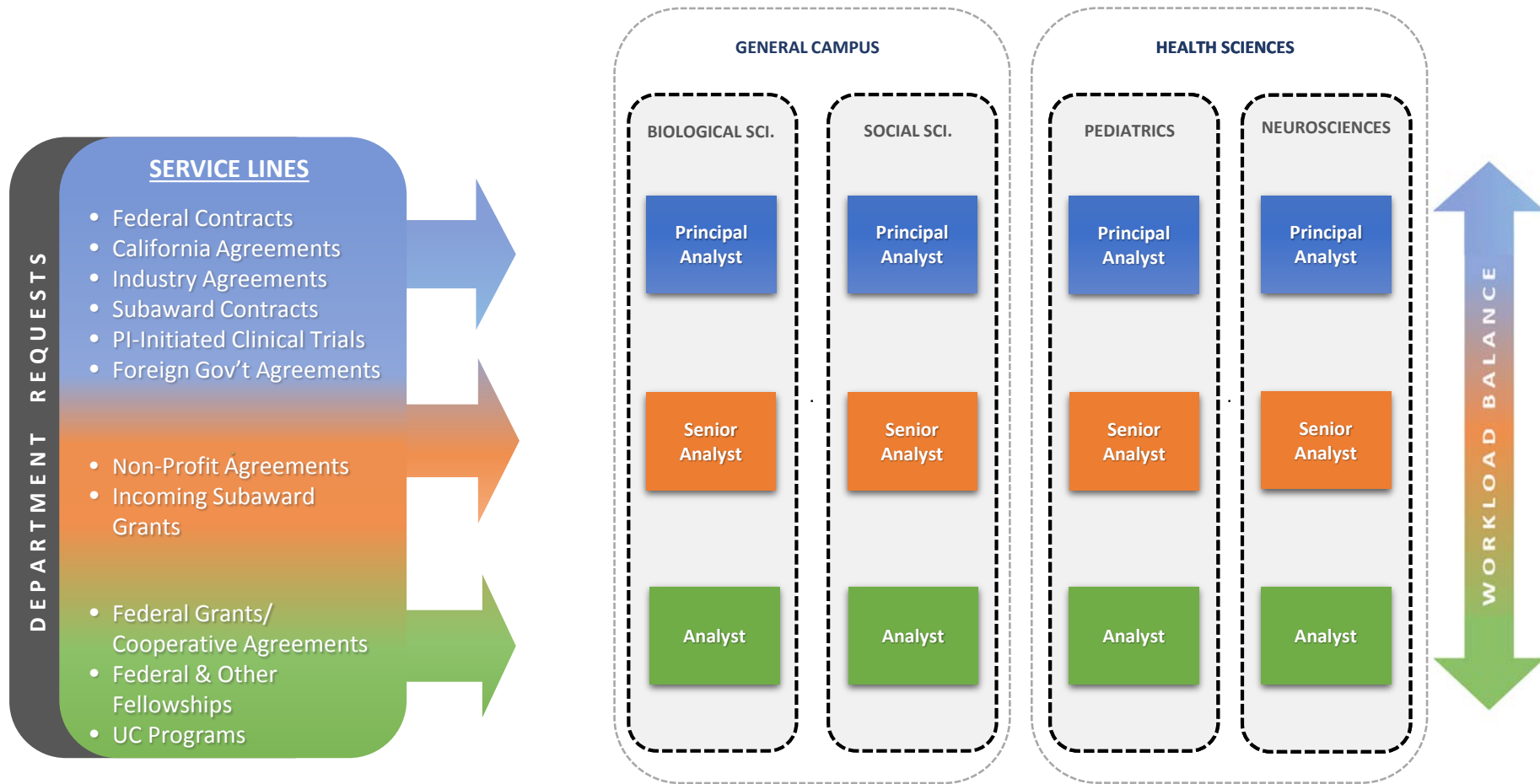
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# OCGA Department Model

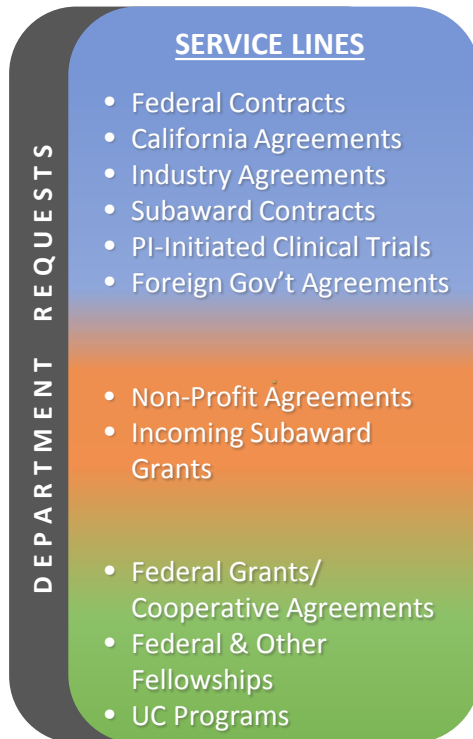


# Contract & Grant Service Lines

Service Lines are distinct categories of agreement/transaction types.

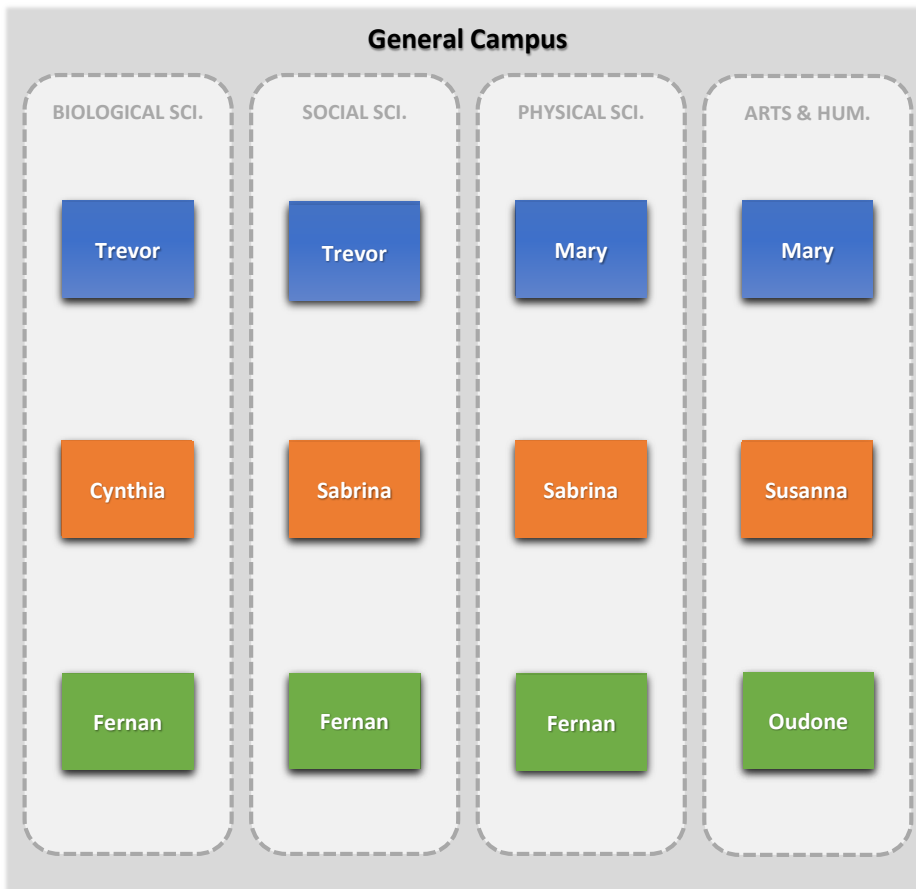
## How were they developed?

- Grouped by Like Items – What transactions are processed in a similar way, using similar steps or tools.
- Complexity – Some types of agreements include very complex legal language and terms and take a long time to negotiate, while other agreement types involve relatively routine terms and steps and can be completed more quickly.
- System Legacy – Some transaction types are handled in a certain way or using certain tools:
  - Because of how some systems are set up to handle their data (for example, because of the way some items are coded in COEUS).
  - Based on past processes between distinct offices (for example, between OCGA and OPAFS).



# Department Teams

Department Teams comprise of 3 c&g officers (1 analyst, 1 senior analyst, and 1 principal analyst) collaborating to serve a department.



## Benefits:

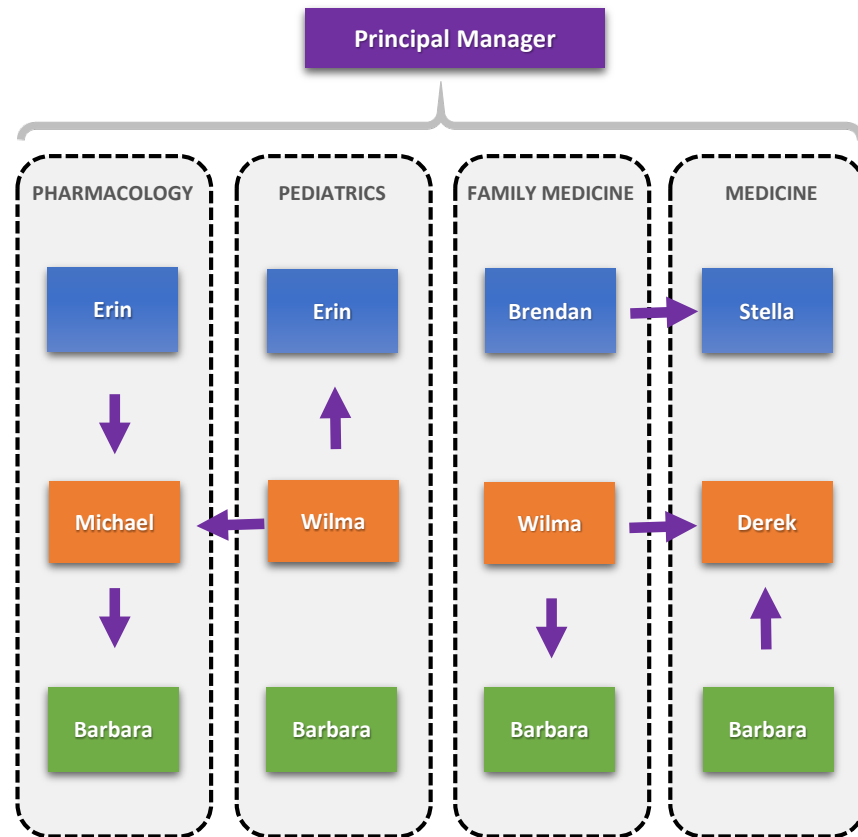
- Departments will have a consistent team they work with
- More insight into PI portfolios
- Builds strong relationships

\*Names are illustrative and not meant to reflect actual assignments\*



# Workload Assignment and Reassignment

Workload Balance is the redistribution of work within a Department Team to balance capacity and levels of complexity.



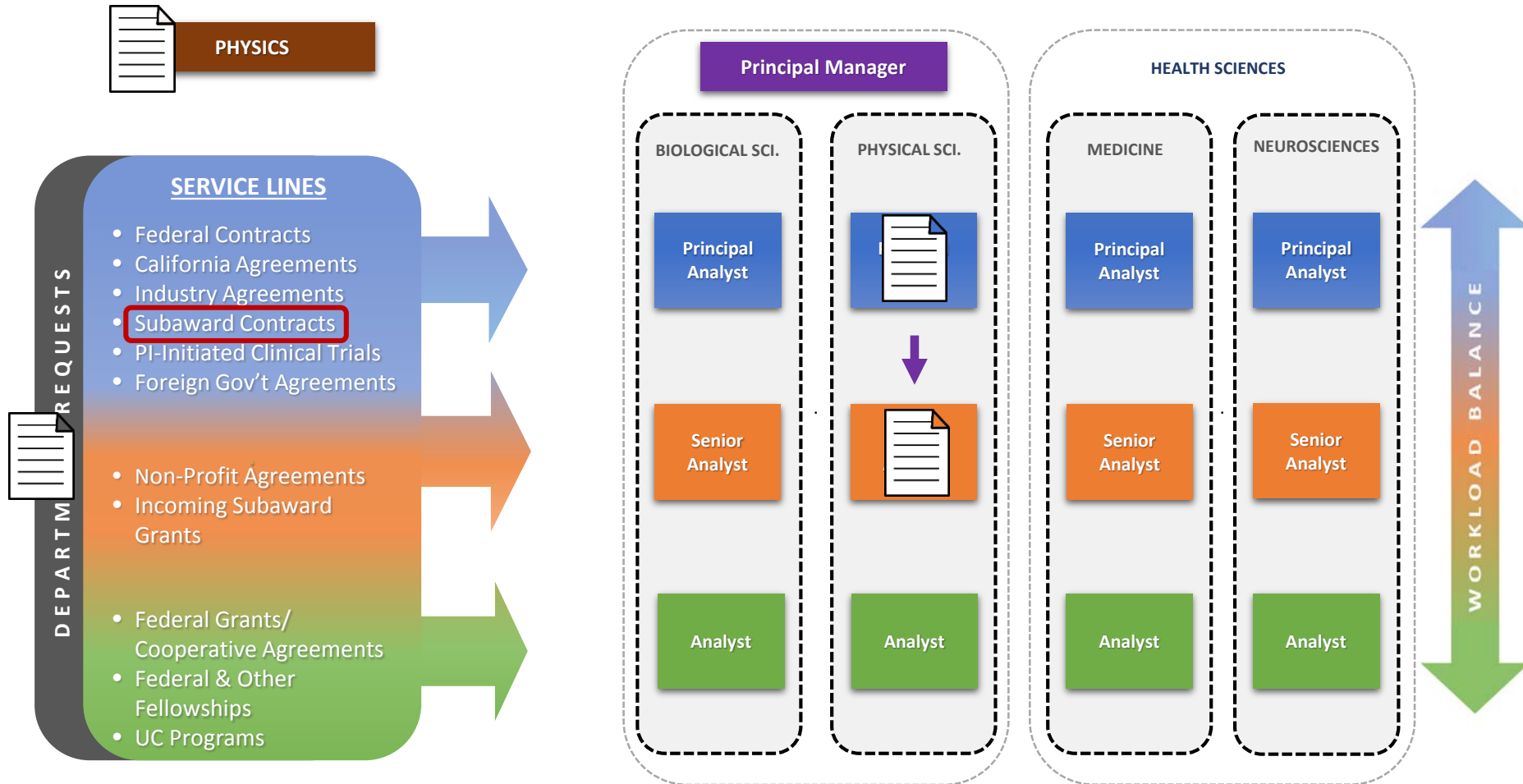
## Principal Analyst Managers

(1 HS and 1 General Campus) are responsible for distributing workload to the members of each Department Team based on:

- staff availability
- work capacity
- agreement complexity
- staff absences

\*Names are illustrative and not meant to reflect actual assignments\*

# Department Model at Work

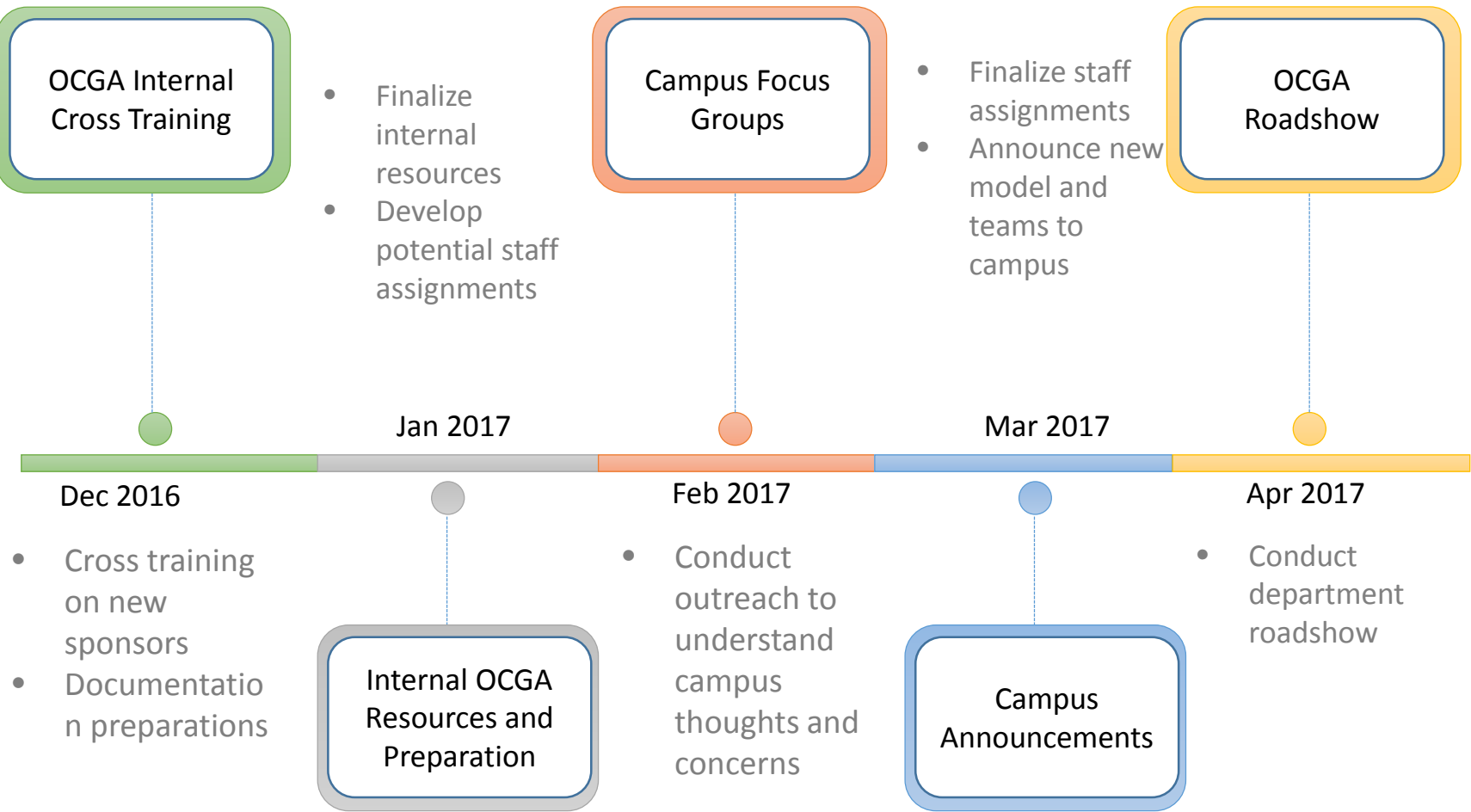


# Benefits of the New Model

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- Dedicated team for each department/division
- Reducing the confusion of who would be assigned
- Stronger understanding of the departmental needs
- Stronger relationships with department staff and PIs
- Better understanding of PI research portfolios
- Builds a broader knowledge base of each officer
- Creates stronger backup capability

# Expected 'Go-Live' Date



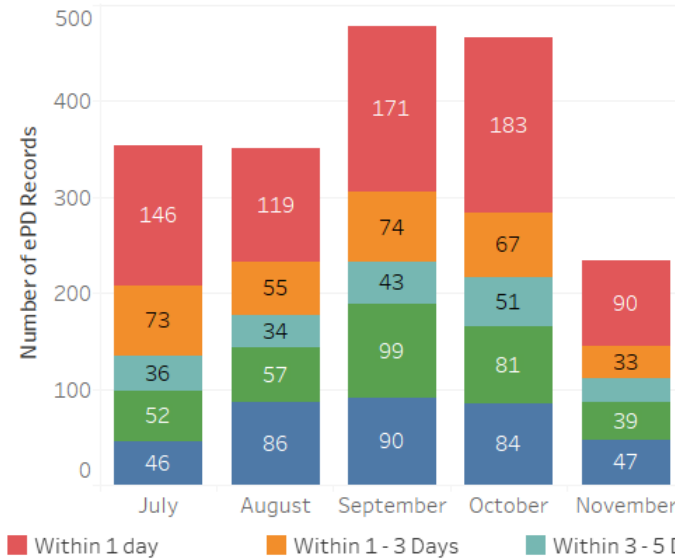
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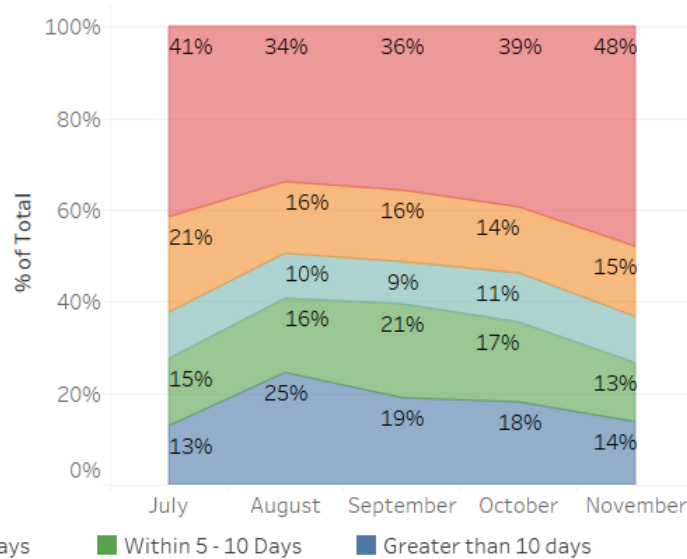
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- **Discussion and Next Steps**
  - Timely Proposal Submissions
  - Communication & Outreach

# Timely Proposal Submissions

Proposal Submission Count by Month



Proposal Submission % of Total by Month

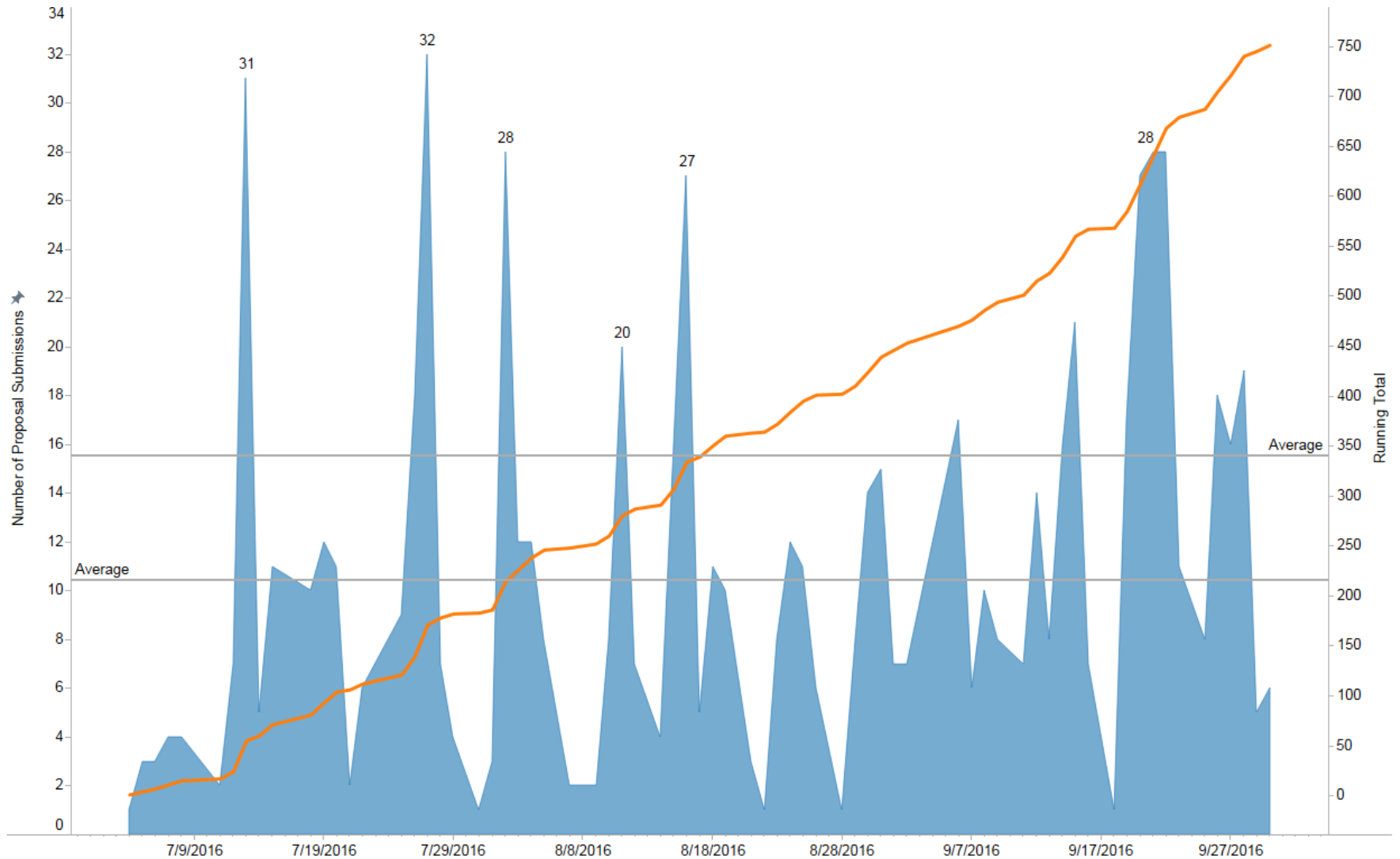


## Overall Proposal Submissions by Date ePD was Routed to Analyst Prior to Sponsor Deadline Date

Day Grouping	Number of ePD Records	% of Total
Within 1 day	658	38.08%
Within 1 - 3 Days	282	16.32%
Within 3 - 5 Days	172	9.95%
Within 5 - 10 Days	299	17.30%
Greater than 10 days	317	18.34%
Grand Total	1,728	100.00%

(Day Grouping = Routing Start Date - Proposal Deadline Date)

# Daily Proposal Submissions



# Next Steps

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- **January – April: Communication & Outreach**
- **Approx. Late April 2017: Launch of new model**
  
- **Continuous Department Feedback**
  
- **Questions?**