Managing a Post-Award Office in Today's Environment

David Schultz

Assistant Vice President for Sponsored Programs, University of Houston

Martin Smith

Director, Education & Research, Huron

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Overview

Description:

- Managing a post-award office in today's environment presents new and difficult challenges.
- Staffing is especially challenging competing with a smaller pool of candidates, inflation with stagnant salaries, and retirements of long-time subject matter experts.
- Knowing how many FTEs are appropriate for ever growing research portfolios. These issues are magnified working in an environment with transition to cloud-based ERP systems, outdated business processes, and demands for improved reporting with data visualization.

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Overview

Learning Objectives:

- Participants will explore today's environment and the presenters will share solutions that have worked for them to navigate these difficult times, methods for benchmarking, and metrics for evaluating performance for improved outcomes.
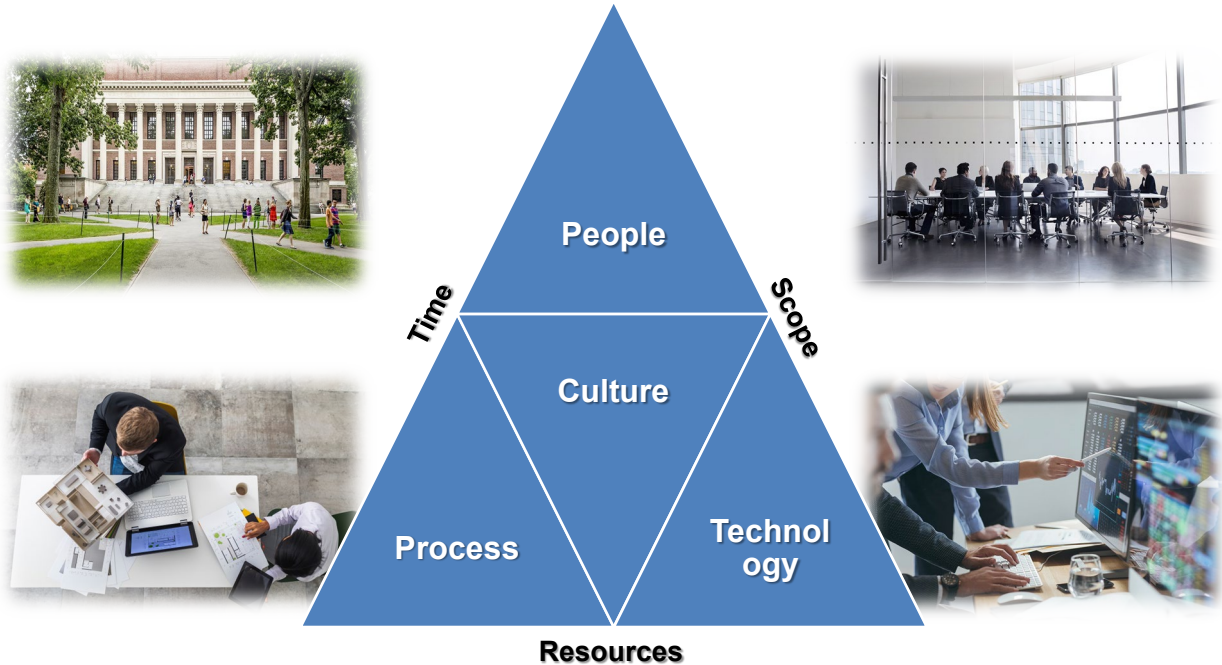
Pre-Requisites:

- Participants will want familiarity with Post-Award management and accounting functions.
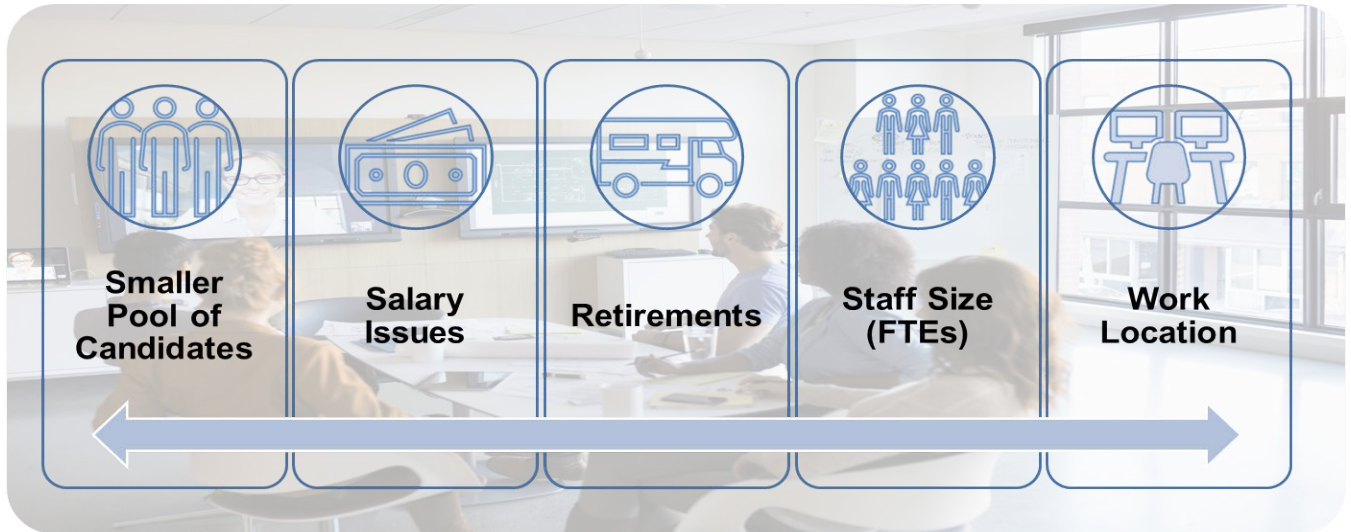
What is managing today's post-award office?

Suggested Management Framework

People

Culture

Process

Technology

Time

Scope

Resources

Managing today's post-award office: People

Smaller Pool of Candidates | Salary Issues | Retirements | Staff Size (FTEs) | Work Location

Managing today's post-award office: Technology

Financial System

- Outdated financial system
- Heavily modified system
- New ERP not well built out
- New ERP working perfectly 😊

Integrations

- Pre-award
- Service centers / feeder systems
- Effort reporting and commitments
- Compliance systems

Reporting

- On-demand canned reports
- Data warehouse with full end-user query capabilities
- Request reports from IT service team
- None of the above

Managing today's post-award office: Process

New system with old business processes and many gaps

Keeping up with constant changes (i.e., sponsor requirements)

More exotic funding and billing requirements (e.g., combination pre-pay, milestone payments, yet cost reimbursable).

Central vs. decentralized roles and responsibilities

Independent thinking vs. elaborate, documented desk procedures

Considering your solutions

Ideal

More money, more people, better systems

Realistic

Reality—current state may be the future state

Advanced Content Discussion

- Case studies
- Take-away ideas

Suggested approaches based on real examples

1. Large State School

- Stabilized operations by optimizing the financial system, then hired inexperienced talented people and train them how to do the job from the ground up, allowed them to work remotely, and are hoping they stay because the pay is in the bottom quartile.

2. Small Private

- Stabilized operations, hired inexperienced talented people and trained them how to do the job from the ground up, but paid them well above market rates and they stayed a long time (5+ years).

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Suggested approaches based on real examples

3. Medium State School

- Holistic rebuild, hired talented directors, who could develop and lead, revisited outdated business processes, and filled almost all vacancies.

4. Medium Private

- Institutional culture was insulated from financial compliance environment in which sponsored research functions.

Ten Takeaway Ideas

1. Appreciate the history of the office and how things got to where they are

2. Assess talent you have and make strategic hires

3. Review internal desk procedures (desk manuals, word-of-mouth "how-to" practices) and external content (website, forms, policies, procedures)

4. Build relations with your constituents—improvement will take time and you need their patience and support

5. Understand your systems and reporting capabilities

Ten Takeaway Ideas

6. Evaluate the "nice to do" vs. the "need to do" items

7. Develop a realistic timeline

8. Implementing change effectively and being mindful of the impact on your staff—going beyond emotional intelligence, but truly treating your staff as people and not "FTEs"

9. Be able to show quantitative results through performance metrics

10. Ensure you have effective conversations with leadership

Thank You!

David Schultz
Asst. Vice President, Sponsored Programs
University of Houston
Office 713-743-8383
dschultz@uh.edu

Martin Smith
Director, Education & Research
Huron
Mobile 267-259-5865
martsmith@hcg.com