



**Resource Optimization**

| Unit     | Project Title                       | Impact to unit | Impact to Office of Research | Impact to campus | Project Description                                                                                                                                                                                                                                                                                  | Dates                | Compliance | Reputation / Competitiveness | Federal Requirements / Reporting | Infrastructure | Systems / Tools | Reduce Burden / Enhance Research Enterprise |
|----------|-------------------------------------|----------------|------------------------------|------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------|------------|------------------------------|----------------------------------|----------------|-----------------|---------------------------------------------|
| HSD      | Guidance-- Is It Research           | x              | x                            | x                | Topics of "Is It Research" and "Is it Human Subjects" investigated and comprehensive guidance and trainings for staff provided to clarify HSD policy on these determinations                                                                                                                         | 11/1/2015 - 4/1/2016 |            |                              |                                  | x              | x               | x                                           |
| ORIS     | Research website redesign/discovery | x              | x                            | x                | Evaluation of work needed to consolidate OR and sub unit sites in one user focused website                                                                                                                                                                                                           | 4/15/2016            | x          |                              | x                                |                | x               | x                                           |
| ORIS     | MyResearch Portal                   | x              | x                            | x                | 2016 Spring release included:<br>- Newsfeed Beta<br>- New landing page summaries<br>- Training Transcript refreshers and equivalencies                                                                                                                                                               | 6/1/2016             | x          |                              |                                  |                |                 | x                                           |
| ORIS     | Researcher Profiles                 |                |                              | x                | Decision was made to defer the Implementation of Researcher Profiles in light of budget constraints                                                                                                                                                                                                  | 6/1/2016             |            | x                            |                                  |                |                 | x                                           |
| ORIS     | Subaward Management in SAGE         |                | x                            | x                | Enable research teams to begin collaborative research up to 4 weeks sooner by reducing overall processing time on subawards, and improve process transparency, with a combination of business process changes and by moving subaward request intake out of ARIBA (procurement system) and into SAGE. | 5/16/16              |            |                              |                                  |                | x               | x                                           |
| ORIS/HSD | Zipline                             | x              | x                            | x                | Zipline Phase I successfully went live to all academic units that submit human subjects research applications to IRB J in HSD.                                                                                                                                                                       | 5/31/2016            | x          | x                            | x                                |                | x               | x                                           |
| ORIS     | E-Learning hosting                  | x              | x                            | x                | Set up e-learning hosting platform for required and voluntary training.                                                                                                                                                                                                                              | Jan 2015 - Sept 2016 | x          | x                            |                                  |                |                 | x                                           |

|          |                                                                                          |   |   |   |                                                                                                                                                                                                                                                                                          |               |   |           |  |  |   |  |   |
|----------|------------------------------------------------------------------------------------------|---|---|---|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------|---|-----------|--|--|---|--|---|
| OSP      | Agreement types decision tree                                                            | x | x | x | Streamline process for agreement types that go different places (CoMotion, Global Affairs, Advancement etc.)                                                                                                                                                                             | May -         | x |           |  |  | x |  | x |
| OSP      | Strategic Plan                                                                           | x |   |   |                                                                                                                                                                                                                                                                                          |               |   |           |  |  |   |  |   |
| OSP      | Review & collaborate with Post Award Financial Compliance Office on "Calendar" elearning |   |   | x |                                                                                                                                                                                                                                                                                          | March         |   | Jan-April |  |  | x |  | x |
| OSP      | End of Award Form Development & Publication                                              | x |   | x |                                                                                                                                                                                                                                                                                          |               |   |           |  |  |   |  |   |
| OSP      | March -April - Revamp Subaward Web content                                               | x |   | x |                                                                                                                                                                                                                                                                                          | March - April |   |           |  |  |   |  |   |
| OSP      | Develop & communicate Subaward transition plan                                           |   |   | x |                                                                                                                                                                                                                                                                                          | Jan-June      |   |           |  |  |   |  |   |
| OSP      | Collaborate on intro to Research Admin Campus Course revamp                              | x | x | x | PAFCO, ORC / CORE collaboration - this was completed - card needs fleshing out of activities                                                                                                                                                                                             |               |   |           |  |  |   |  |   |
| OSP      | Prep for OSP Participation in FDP Expanded Clearinghouse Phase 1 Pilot                   |   |   |   | UW will participate in piloting an FDP expanded Clearinghouse with 40 other institutions that would contain audit, demographic and fiscal information needed by pass-through entities (PTEs) when they are issuing subawards. Initial work is needed to prepare for OSP's participation. |               | x | x         |  |  |   |  | x |
| OSP      | update Subaward templates                                                                | x |   |   | update OSP subs template to the FDP templates                                                                                                                                                                                                                                            |               | x |           |  |  | x |  | x |
| OSP      | Subs in SAGE engagement plan                                                             | x | x | x | planning and executing a through engagement plan to support Subs in SAGE, and roll back Ariba                                                                                                                                                                                            | Jan-June      |   |           |  |  |   |  |   |
| OSP      | Subaward Training & materials                                                            |   |   | x |                                                                                                                                                                                                                                                                                          | Jan-May       |   |           |  |  |   |  |   |
| OSP      | HSD launch of Zipline - OSP training needs and business process changes                  | x |   |   | HSD is launching a new electronic system on May 31st. This card represents analysis of both OSP training needs (provided by HSD) and possible changes to OSP business process and guidance documentation.                                                                                | March-June    | x |           |  |  |   |  |   |
| OSP      | Update IRB verification guidance (CC locations, other changes, meet with HSD rep)        | x |   |   | Update IRB verification guidance (CC locations, other changes, meet with HSD rep)                                                                                                                                                                                                        | March-June    | x |           |  |  |   |  |   |
| OSP SUBS | NEW - Subawards Requests in SAGE                                                         |   |   |   | Developed and deployed (w/ORIS) Release 1 of new SAGE module - Subawards in SAGE                                                                                                                                                                                                         | mid May       |   |           |  |  |   |  |   |
| OSP SUBS | Release 2 Subawards in SAGE Design/Planning                                              |   |   |   | Developed requirements (w/ORIS and Campus) for Release 2 of Subawards in SAGE                                                                                                                                                                                                            | May/June      |   |           |  |  |   |  |   |
| ORC      | CORE: Training Grants Workshop                                                           |   |   | x |                                                                                                                                                                                                                                                                                          | 1/15/16/      |   |           |  |  |   |  | x |
| ORC      | CORE: Dedicated Learning Space                                                           |   |   | x | Acquired a computing/classroom for CORE                                                                                                                                                                                                                                                  | 1/30/16       |   |           |  |  |   |  | x |

|     |                                           |  |   |   |                                                                                         |         |   |   |   |  |   |  |   |
|-----|-------------------------------------------|--|---|---|-----------------------------------------------------------------------------------------|---------|---|---|---|--|---|--|---|
| ORC | CORE: Course Materials                    |  |   | x | CORE presentations, resources and training materials                                    | 3/1/16  |   |   |   |  | x |  | x |
| ORC | Equipment Threshold Communication Plan    |  |   | x | Broad plan for communicating the new rules for Equipment Threshold                      | 3/4/16  | x |   |   |  |   |  | x |
| ORC | FDP UW Survey Report                      |  | x | x | Analysis and Report of FDP/UW Survey Results (reported to campus)                       | 3/30/16 |   |   | x |  |   |  | x |
| ORC | Energy Fact Sheet                         |  |   | x | Updated Energy fact Sheet                                                               | 6/20/16 |   | x |   |  |   |  | x |
| ORC | FCOI Refresher Course                     |  |   | x | FCOI eLearning Training                                                                 | 6/30/16 | x |   |   |  |   |  | x |
| ORC | Scenario-based Design of Two CORE Courses |  |   | x | Updated CORE courses based on scenario-based design: F&A Type Costs, and Cost Transfers | 6/30/16 |   |   |   |  |   |  | x |