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CU I&E Submission: Department PreAward Automation and Streamline [1]

Category

Sponsored Projects/Research
Technology

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Project Description

The PreAward process for submitting proposals is an ideal project for automation. This project involved low/no cost apps available to university staff: Trello, Zapier, and Formstack. Previously, faculty sent emails with some information about a pending submission that was transferred to a chalk board. Now faculty submit a formstack request that provides basic (consistent) information about their submission; the formstack triggers a Zapier automation which creates a card in a pre-award submission list in Trello. Now we have all upcoming submissions in one list in Trello. The Trello board also contains all PreAward resources in another list, template cards with standardized checklists based on the submission type (prime, subcontract, award with subcontracts, etc.). The Trello board also tracks the submissions through the review cycle into separate lists. Also, this streamline included the creation of two other formstacks that make the collection of routing and human subjects' information consistent and straightforward.

Project Efficiency

This dramatically reduces email traffic with the PI because we ask for consistent information every time through the notification process, routing intake information, and human subjects Formstacks. It saves time for the research administration staff responsible for the submission with standardized checklists, templates, and all required information organized on a single Trello board. This also has created an unintended efficiency because we track the status of each submission in a way that allows us to have meetings with our data team to assess the likelihood of funding, so we are more ready to onboard a project if funding looks likely.

Project Inspiration

This project used no/low-cost apps to streamline the department proposal submission process. The inspiration was to leverage technology to eliminate repetitive, disjointed, and manual processes to the greatest extent, thereby being as efficient as possible. I also wanted to create a process that improved knowledge transfer. There are a lot of tips/tricks, resources, answers to questions and problems that have been collected over the years and rather than having to have meetings or dig through emails it is all located in well organized and labeled cards that are searchable and indexed.

What Makes You Happiest about this Project?

Efficiency gained, fewer unnecessary/complicated communications, streamlined processes, and procedures. Furthermore, this was very easy to implement and cost very little (we do pay for 2 Trello Pro annual licenses for better features that also apply to other boards (~$250 annually for 2 licenses). This is set-up in a way that if the department onboarded another research administrator, we would be able to cut training and orientation time down as well because everything is contained and organized in one place.

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