

eRA Evaluation and Selection Project Kickoff

Improved Electronic Research Administration (eRA) System

Agenda

Introduction

Meet Our Team

What We Learned From You

Acquiring Solution & Services

Collaborative Partnership

Next Steps/Q&A

Project Purpose: ND needs a state-of-the art eRA that can support the research growth expected in the next decade.

Institutional Objective: Provide a best-in-class centralized system for managing the research life cycle by minimizing risk, maximizing efficiency, optimizing planning, and providing on-demand reporting to empower data-driven decision making across the institution.

Why Now? - Key Drivers



Opportunity

ND's 10-yr strategic framework in 2023 recognizes the need for investment in infrastructure, specifically tools that will support the research growth in the coming decade.



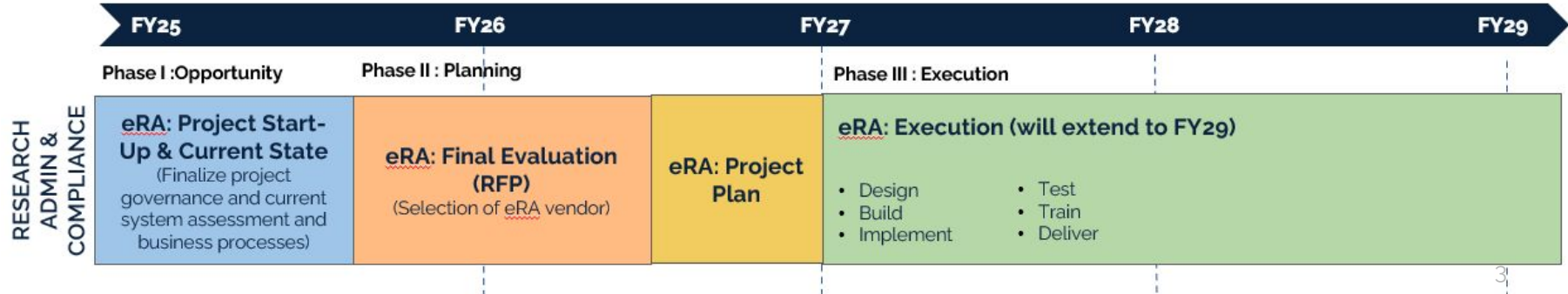
Risk

There is a risk that Cayuse will stop supporting the current version and ND will be forced to upgrade. Moving to the new version = "implementing" a completely new system.

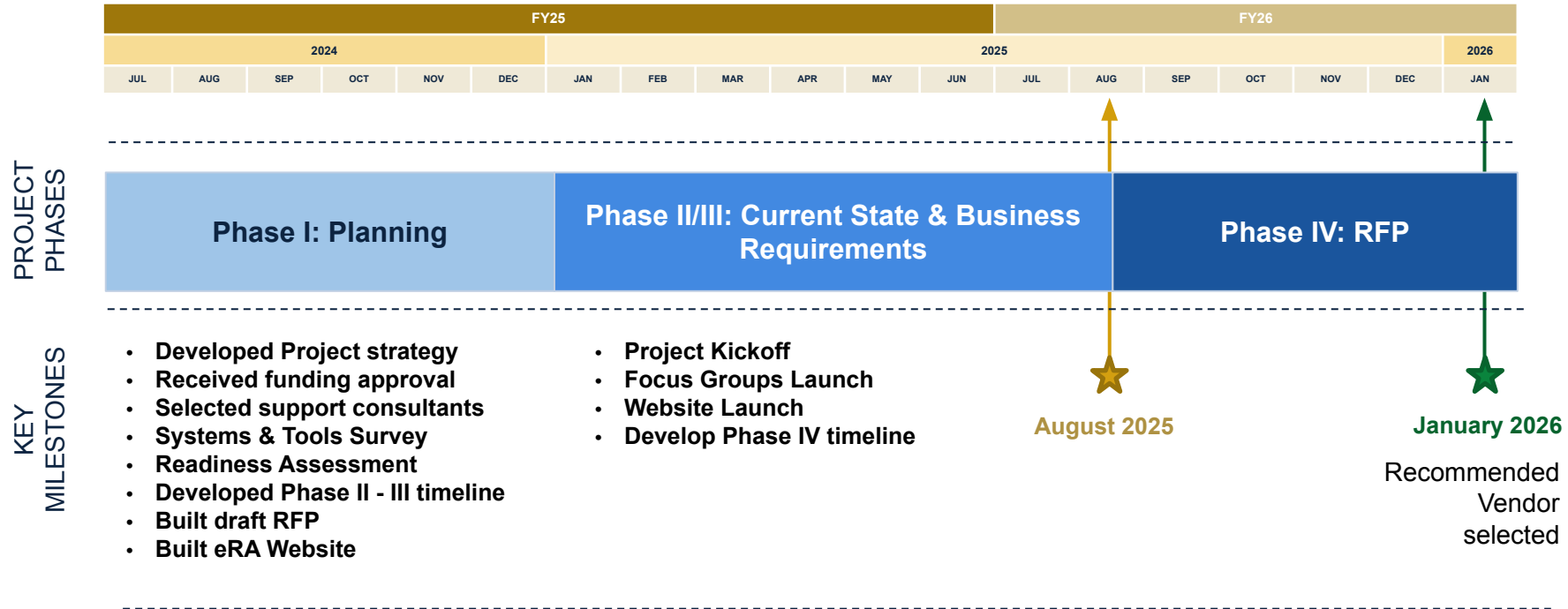


Outdated Tech

ND has outgrown the capabilities of the current software; we need to improve workflows and operational efficiencies to support the research life cycle.



NDR eRA Project Timeline (as of 10/31/24)



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Notre Dame Research eRA Project Leadership Team

eRA Project Sponsor



Liz Rulli

Associate Vice President for Research

eRA Project Director



Carolina Avendano

Director of Research BI, Sys & Ops

eRA Change Manager



Colleen Butcher

Strategic Projects Program Manager

ISG eRA Project Leadership Team

eRA Project Advisor



David Hemingson

ISG Partner: Higher Education and
Academic Medical Center Practice

eRA Project Manager



Kristi Bradford

ISG Director

eRA Technical Advisor



John Wheat

ISG Director

ISG Experience

Service Offering

- Assessment of legacy administrative systems
- Acquisition of Enterprise Resource Planning (ERP) and other enterprise software, along with related implementation/integration services
- Project oversight of large enterprise-wide software implementations
- IT sourcing and cloud computing advisory services

Independence

- We maintain our independence with regard to all software providers and integration services vendors

Public-Sector Focus

- Our client base includes institutions of higher education (private and public), states, cities, and counties located throughout the United States

Client Success

- We use every client we have ever had as a reference

ISG Higher Education



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Systems & Tools Survey

Survey Stats

Total Surveys Issued: 94 | Total Survey Responses: 68 | Overall Response Rate: 72%

Represented Areas

NDR Leadership
NDR RBISO
NDR Pre-Award
NDR Contracts

NDR GPM
NDR Policy and Training
NDR Research Integrity
RSPA Controllers

C&F Relations
NDR RPM
OIT

Who Responded?

Management Responsibilities



■ Supervisors ■ Non-Supervisors

Type of User



■ Transactional ■ Informational ■ Both ■ None

Login Frequency



■ <3 times ■ 3-5 times ■ 6-15 times ■ >15 times

Experience



■ 0-1 year ■ 1-5 years ■ 5+ years



Key Areas of Feedback

Modules	Functionality	End-User Friendliness	End-User Understanding	Regulatory Compliance	Timely System Changes	System Availability	Overall Average
Sponsored Projects Pre-Award (PRA)	2.56	2.22	3.67	3.07	2.46	3.59	2.93
Compliance (CO)	2.00	1.64	3.27	3.00	1.89	3.27	2.51
Sponsored Projects Post-Award (POA)	2.94	2.58	3.17	3.34	2.92	3.60	3.09
Agreements (AG)	2.45	2.36	3.00	2.67	2.25	3.33	2.68
Financial Forecasting (FF)	2.31	2.17	3.08	3.00	3.20	3.78	2.92
Cross-Functional (CF)	2.11	2.50	3.25	3.17	2.17	3.88	2.85
Reporting (RP)	2.20	2.33	3.11	3.00	2.29	3.25	2.70
Technical (TE)	2.00	2.00	4.00	4.00	4.00	4.00	3.33
Total Averages	2.32	2.23	3.32	3.16	2.65	3.59	2.88

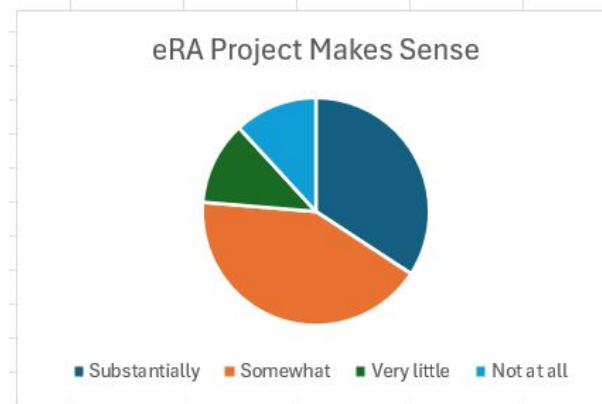
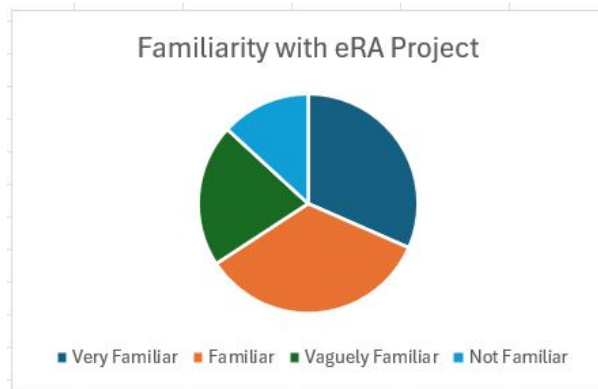
Trends in User Comments

1. Lack of integration of the data requires pulling data from multiple systems to perform reporting/data analysis
2. Lack of integration between the systems makes it difficult to see the full lifecycle of the award (and where it is in the process)
3. eRA systems are not intuitive and require training and experience to understand/use
4. Solutions are outdated and are not easily improved
5. Documentation is not easily or consistently stored, retrieved or retained

eRA Project Readiness Survey

Survey Stats			
Total Surveys Issued:150 Total Survey Responses: 87 Overall Response Rate: 58%			
Represented Areas			
NDR Leadership	NDR GPM	OIT	Provost
NDR RBISO	NDR Policy and Training	Staff Academy	UCRSP Faculty
NDR Pre-Award	NDR Research Integrity	IRB Committee	Procurement
NDR Contracts	NDR Research Security	IBC Committee	Faculty/Researcher
NDR	RSPA Controllers	IACUC Committee	
NDR RPM	C&F Relations	OGC/Audit	

Key Areas of Feedback- Familiarity



Summary

- Opportunities continue to exist to inform the Notre Dame community regarding the electronic Research Administration (eRA) initiative and the benefits that it is expected to provide.
- Survey respondents that are familiar with the vision and objectives of the initiative better understand and support it.
- Of those respondents that are familiar with the initiative, trends in prioritized benefits align with feedback from Systems and Tools survey: More tightly integrated systems, Intuitive user interface, a single institution-wide data repository for reporting, improved compliance and regulatory requirements

Key Areas of Feedback- Effort Required



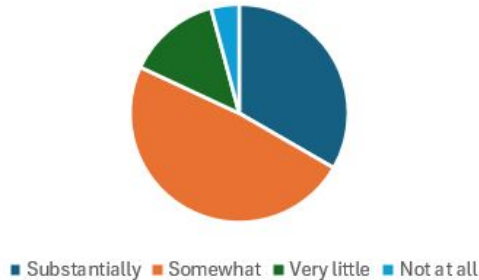
Summary

Respondent comments indicate an interest in:

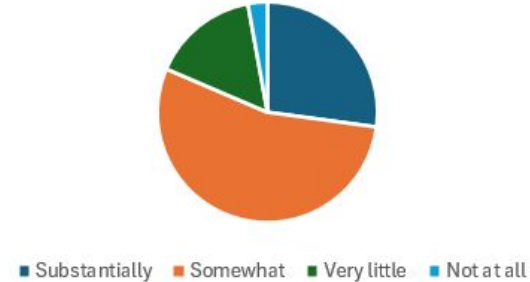
- Continued and expanded updates regarding the status of the initiative
- A better understanding of who will be involved in the initiative, expectations regarding the respondent's involvement (and particularly how this involvement will mesh with day-to-day responsibilities), and the timing of the involvement
- Gaining an early understanding of these expectations; others reported a belief that this information would be forthcoming when a plan to transition to the implementation phase is ready

Key Areas of Feedback- New Ways of Working/Process Changes

Organization Process Changes



Individual Process Changes



Summary

- Respondents indicated a strong anticipation of process changes both at the organization/department and individual level
- Respondents are convinced their supervisor is willing to accept these new ways of working and are of the same mind themselves. Of those who were supervisors, 66% indicated that their reports are very willing or willing to accept new ways of working.
- Respondent comments focused on opportunities to reducing manual processes through improved access to information, system integration, automated workflow tracking and routing, alerts and notifications, and other means of improving productivity and efficiency.

Key Areas of Feedback- Communications

eRA Communication-Unit Level



■ Very Open ■ Open ■ Limited ■ Not Open

Consistent and Effective



■ Always ■ Generally ■ Sometimes ■ Never

Summary

Of those indicating they are familiar with the initiative, 60% of the respondents indicated that opportunities to discuss changes in ways of working within their organization are very open or open.

On the other hand, 40% indicated these opportunities are either limited or nonexistent, or they did not respond.

Respondent comments indicate an interest in:

- Increased communication regarding more detailed expectations and timeline
- Targeted communication to the system end users as well as the more senior staff
- Understanding of where the project is in the process and where their teams need to participate

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Acquiring Solution & Services

What We Will Need From You

Next Steps/Q&A

Acquiring Solution and Services Approach

Project Planning

- Align Goals & Objectives
- Establish Governance structure, decision-making and PM standards
- Formalize Project Charter and Project Schedule
- Project Status Reporting and Progress Monitoring in place
- Onboard and orient project team

Current State

- Establish Focus Groups
- List Current State Business Processes
- Understand current pain points
- Awareness for Project Stakeholders
- Understanding of Project Readiness Level
- Readiness analysis and recommendations to improve Project Readiness Level

Future State

- Alignment on Future State Requirements
- Understanding of requirement priorities
- Identify and document opportunities for improvement
- Document solution requirements to include in RFP

RFP & Evaluation

- Recommend vendor for eRA software/services
- High-level understanding of critical gaps between the selected solution and required business needs
- Budget estimate for implementation, ongoing support and operations
- Build consensus and support for the solution
- Identify employees to participate in the implementation phase

Project Management

Change Management



Key Success Factors

Aligned Goals and Objectives

Organizational Change Management

Strong Sponsorship

Understanding of Critical Functions and Gaps

Wide Stakeholder Participation

Strategic Acquisition Approach

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Evaluation & Selection eRA Project Governance

Governance Areas:

- Scope
- Timeline
- Budget
- Resources
- Quality
- Risk



eRA Evaluation and Selection Project Team Structure



Governance Approach

Guiding Principles

- Proactive issue management
- Forward-looking risk management
- Leverage standard functionality
- Timely decision-making
- Adherence to project processes and procedures

Key Success Factors

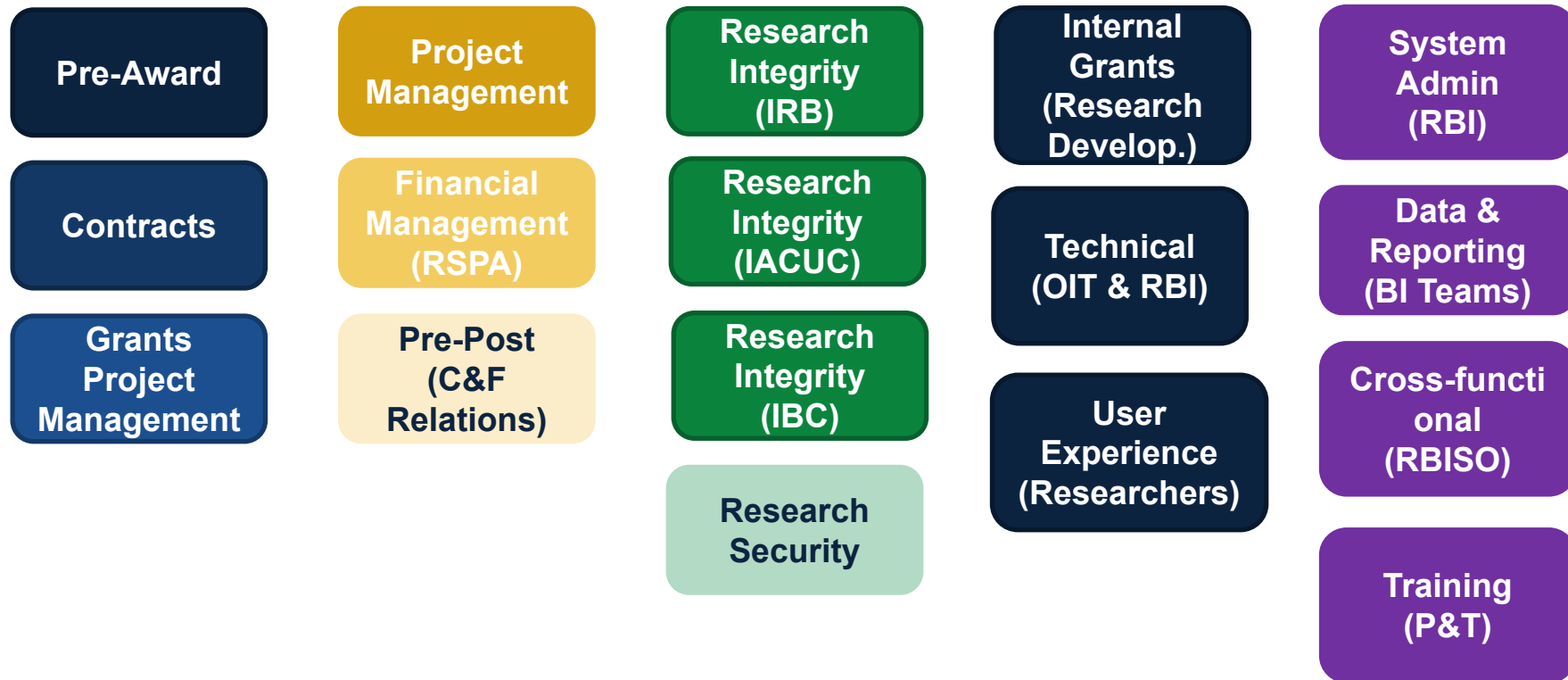
- Timely decisions that are efficiently communicated
- Membership provides representation of the collective voice of the organization
- Evaluation committee members are vocal change advocates



How You Help Make the Project a Success



Current State (CS)/Business Requirements (BR) Focus Groups



CS/BR Focus Groups Activities

Guiding Principles

1. Define Clear Objectives
2. Diverse Representation
3. Structured Facilitation
4. Data-Driven Approach
5. Active Listening and Empathy
6. Iterative Process
7. Actionable Recommendations

Expectations from Participants

- Attend Process Mapping training
- Attend 1-3 focus group sessions
- Complete pre-work as needed to come prepared to contribute
- Provide open & honest feedback
- Foster a collaborative environment

CS/BR Focus Group Training:

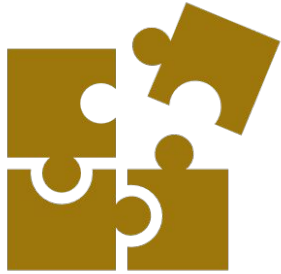
- Process Mapping Training – February 2025
- Launch at NDR February 2025 Onsite

CS/BR Focus Groups:

- Scheduled Feb 2025 – July 2025



How Change Management Drives Project Success



- Ensuring that people are “in the know” as the project unfolds
- Developing comprehensive, interactive communication
- Creating space for collaboration, reflection, and feedback
- Identifying and proactively building competence
- Building trust across project phases
- Embedding people-focused change practices into the project planning and strategy

eRA Project's Change Management Approach



eRA Project Website



Where to find us for all the latest information!

Notre Dame Research

UNIVERSITY OF
NOTRE DAME

About People Our Research Our Services News & Events

Electronic Research Administration (eRA)

Empowering research innovation through streamlined processes

- About eRA
- eRA Dates and Milestones
- eRA Governance
- eRA Frequently Asked Questions
- Contact eRA

Home > Electronic Research Administration (eRA)

The University of Notre Dame is committed to fostering research growth and innovation through robust infrastructure and streamlined processes. The Electronic Research Administration (eRA) Project is a transformative initiative to select and implement a cutting-edge system that supports the entire research lifecycle, empowering data-driven decisions and operational excellence.

Join the journey to shape the future of research administration at Notre Dame, ensuring that researchers, administrators, and partners have the tools they need to succeed.

Discover the [best practices](#) in preparing for, selecting, and implementing the eRA system, explore key [project milestones](#), and learn about the [governance and collaborative approach](#) driving this effort. View answers to [frequently asked questions](#), and share questions or feedback by [emailing the eRA team](#). Let's build the future of research administration together.

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What's Next?



Readiness Interviews: **January 22-23**

Process Mapping Training: **February**

Focus Groups Launch: **February 20 (during onsite)**

Project Updates: <https://research.nd.edu/era/>

Contact Us: **era-project-team-list@nd.edu**



Q&A