

Opportunity	2015 Action	Steps & Metrics for 2015	Progress Made in 2015	2016 Action	Steps & Metrics for 2016
Strengthen effective communications	<i>...by developing personalized communication plans for teams and client faculty and fostering a customer service focus.</i>	Document preferred reoccurring meeting schedule for each department and/or division – noting frequency & mode – and post on OSR website by January 2015.	Posted mode, frequency, and attendees for department and/or division to meet with RMS representatives to OSR website (http://osr.ucsf.edu/content/office-sponsored-research-2015-action-plan).	<i>..by collaborating with other research units to increase transparency and clarity in proposal/award statuses and changes to processes/policy.</i>	Create a webpage on the OSR website that will centralize and promote existing resources on how to run reports.
		Aim for 100% target in meeting with client per established standard unless cancelled by mutual agreement.	Estimated 92% of RMS Teams are meeting with clients per established standards.		New proposal and award metric QlikView dashboards to be rolled out to campus by early Spring 2016, in collaboration with the Controller's Office.
		Establish training module for RMS staff (new & established) to reinforce proactive & effective strategies for communication. All current staff will complete training by March 2015.	Office of the Ombuds trainings on techniques for communication, conflict management, active listening at OSR All Hands meetings in March and June 2015.		Create a webpage on the OSR website with recommended listservs and newsletters for OSR clients. This information will be included as the last slide in every Research Administration Town Hall slide deck.
		Develop additional customer service training modules in FY 2015 to reinforce strategies for a customer service oriented approach to interactions between RMS and researchers/departments	Incorporated a partnership section into Research Administration 101 (required training for all new RMS staff).		Collaborate with research units to include OSR updates in a variety of communication forums - including but not limited to the Controller's Office, EVCP's office, and CTSI.
					Outreach to other units via collaborative workgroups (e.g. Research Administration Coordination meetings) regarding communications and policy that involve or have an impact on RMS.
					Leverage CGA implementation of PeopleSoft progress report milestones to efficiently notify Departments and RMS staff to achieve timely submission of continuation/annual reports

Opportunity	2015 Action	Steps & Metrics for 2015	Progress Made in 2015	2016 Action	Steps & Metrics for 2016
Developing productive relationships between the RSC and client researcher	<i>...by improving primary and secondary RSC assignments, regularly assessing customer satisfaction and inviting clients to participate in RSC recruitment.</i>	Meet with researcher at the start of each proposal unless declined by researcher.	Estimated 87% of RSCs are offering to meet with researchers at the start of each proposal.	<i>...by increasing face-to-face time and building relationships with faculty and staff in the client department.</i>	All RSCs available to work from department hoteling space on a regular basis, pending space availability.
		After submission of proposal offer debriefing meeting with client researcher to assess success & challenges of submission.	Estimated 56% of RMS Teams are offering to meet with researchers after proposal submission.		Standardize proposal reassignment procedures and introductions within teams, ensuring that the primary or more established RSC introduces faculty to the new RSC or RMS Associate and provides any guidance necessary to bridge the transition.
		Establish secondary RSC assignments for departments & communicate these by December 2014.	Secondary RSC assignments for all departments and/or divisions posted to OSR website (http://osr.ucsf.edu/content/office-sponsored-research-2015-action-plan).		RSCs and Team Managers to attend annual meet-and-greet with department faculty and staff in order to review RMS services and respond to any questions or concerns.
		Invite clients to participate in the selection of new RSCs & team managers effective December 2014.	Department managers are invited to participate in interviewing final candidates for the RSC, Assistant Manager, and Team Manager roles.		Pop up seminars to be offered on "hot topics" for faculty (e.g. Other Support).
		Team managers to continue to regularly review Qualtrics surveys & follow-up on all concerns raised -- either directly with respondent if identification provided and/or by reinforcing best relationship practices with team at weekly meetings.	Team managers continue to receive and review weekly customer satisfaction reports from Qualtrics surveys.		
		Every effort will be made to maintain established RSC/faculty assignments.	Established RSC/faculty assignments were maintained to the degree possible.		
Reducing staffing turnover	<i>...by partnering with departments to review factors that affect retention.</i>	Review results of staff exit interviews with client departments to develop retention strategies for valued employees.	Results of exit interviews shared internally with RMS Leadership and the staff representative RMS Council in order to develop retention strategies.	<i>...by recognizing, developing, and supporting OSR staff.</i>	Professional development forum for RMS staff will be offered in January 2016.
		Review internal environment within RMS to develop an impact plan to address retention.	Open ended comments were collected with the June 2015 OSR Staff Satisfaction Survey. Comments were analyzed by a subcommittee of OSR Leadership for themes and associated action items.		Create opportunity for OSR staff to volunteer with 501(c)3 organizations.
			Partnered with UCSF Wellness Program to brainstorm how OSR can improve wellness as an organization. Team based action plans are in place for 2016.		Research Administrator Day in September 2016 will recognize OSR staff and connect research administration to the UCSF mission.
			OSR telecommuting policy launched in December 2015.		

Opportunity	2015 Action	Steps & Metrics for 2015	Progress Made in 2015	2016 Action	Steps & Metrics for 2016
Improving subcontract services	<i>...by reviewing subaward processes and services in Spring 2015.</i>	Will engage workgroup comprised of department faculty & staff, RMS subteam & other staff to evaluate workflow & develop plan to evaluate & optimize work flow (in concert with Service Partnership Agreement workgroup recommendations).	Subaward Business Process Improvement took place in May 2015.	<i>...by evaluating, adjusting, and implementing improved subaward processes across RMS.</i>	Collect and assess feedback from pilot teams by early 2016 and move towards RMS-wide implementation and training.
					Review subaward cycle from award receipt to initiation to execution to identify and implement process improvement.
					Review technology to find system solutions.
					Train RMS Associates in the subcontract lifecycle, including document preparation, to help reduce inefficiency, minimize errors, and improve turnaround time.
Establishing service level expectations and consistency across teams	<i>...by updating the RMS Service Partnership Agreement and implementing common processes across teams.</i>	Campus workgroup updating Service Partnership Agreement. Initial review of responsibilities to occur by December 2014, with goal to establish implementation strategies by February 2015 that will include geographic town halls, client meetings, written communications.	Service Partnership Agreement (SPA) workgroup concluded in April 2015. The new RMS Service Partnership Agreement was effective October 1, 2015.	<i>...by continuing to evaluate and implement the RMS Service Partnership Agreement.</i>	Evaluate process changes implemented with the new RMS Service Partnership Agreement for efficiency by Summer 2016.
					Revise Service Partnership Agreement on a bi-annual basis regarding electronic system updates.
					Review internal processes across teams with an eye on standardization and simplification.

Opportunity	2015 Action	Steps & Metrics for 2015	Progress Made in 2015	2016 Action	Steps & Metrics for 2016
Increasing level of expertise across staff	<i>...by expanding the OSR training program to include ongoing training, and collaborative efforts between pre/post-award, UCB and Stanford.</i>	Collect feedback from clients and incorporate into FY 15 performance evaluations.	Estimated 60% of RMS Teams incorporated feedback from clients into FY 15 performance evaluations.	<i>...by ensuring consistent support of OSR staff across all teams.</i>	Standardize RMS Associate roles and expertise across teams to ensure consistent practices and expectations.
		Update Research Administration 101 & quarterly Circuit Training planned by March 2015.	Reviewed and incorporated participant evaluations into revised Research Administration 101 syllabus.		Develop established RSCs to take on mentorship roles within respective teams to help guide Associates and new RSCs in the rudiments of research administration.
		Identification of common training needs by Research Administration Think Tank. Implement shared pre/post curriculum in FY 15.	Offered pre-/post-award trainings on Other Support and related effort reporting in October 2015. Collaborated with the Controller's Office in order to offer monthly Research Administration Brown Bags.		
		Plan regional training with UCB & Stanford pre-award staff for spring 2015.	Hosted UCB/Stanford/UCSF Bridging the Bay conference in October 2015.		
Marketing of Government & Business Contracts (GBC) activities and communication of the dissolution of Contracts & Grants	<i>...by developing a comprehensive communication plan and leveraging web-based tools to direct faculty to the responsible office for given activities.</i>	Engage workgroup comprised of faculty & staff to identify the most effective way to communicate GBC's scope & services available.	Launched Find Office Responsible tool on OSR website to help identify offices based on activity type.	<i>...by strengthening collaborations and actively reaching out to partners.</i>	Join RSCs for faculty meetings for units with high volume of GBC matters.
		Implement plan by February 2015 that may include website, social media, town halls and meetings with departments & control points.	Government & Business Contracts (GBC) content updated and refined throughout OSR website.		Review online resources for services and collaborate with campus administrative units in developing consistent guidance tools.
					Education and outreach regarding unfunded research collaborations.