



OCGA Updates

Patti Manheim – Director

May 8, 2014

Today's Topics

- Operational Management Challenges
- OCGA Master Training Calendar
- Revised EPASS
- Introduction of New Staff

Operational Management Challenges

Background - Leadership Bodies – RAPID Results, Updates, Accomplishments, and Initiatives

RAPID Steering Committee

- Convened by EVC Scott Waugh
- Membership includes Vice Chancellors, Deans, Senior Administrators
- AVC Marcia Smith reports to the Steering Committee on ORA operations and the direction of RAPID initiatives
- RAPID Faculty Advisory Committee reports to the Steering Committee and advises on RAPID priorities

Operational Management Challenges

Background

- Presented “Challenges in OCGA Operations Management” to Steering Committee in March
- Stunned/Astounded by ramifications and complexities of OCGA day-to-day operations
- Provost invitation to present to Dean’s Council

Operational Management Challenges

Background

- Dean's Council
 - Similarly Stunned/Astounded by ramifications and complexities
 - Provost summarizes risks to the institution
 - Deans agree
 - Provost solicits Deans analysis and recommendations

The Issues By the Numbers FY13

Proposals Submitted	4,674	
Received 2 days (16 working hours) or less in advance of sponsor deadline	1,899	42%
Received 4 days (32 working hours) or less in advance of sponsor deadline	3,468	74%

Larger component of our portfolio is complex

- 20% decrease in federal dollars
- 56% increase in state, foundation, other dollars

Impact of Late Proposals

- OCGA accepts ALL proposals regardless of:
 - How late it is received:
 - *5 minutes prior to deadline?*
 - How complete:
 - highly variable quality and completeness
 - highly variable preparer expertise
 - How inflexible the deadline and the electronic system
- Process to accommodate a *reasonable* number of late proposals/real emergencies

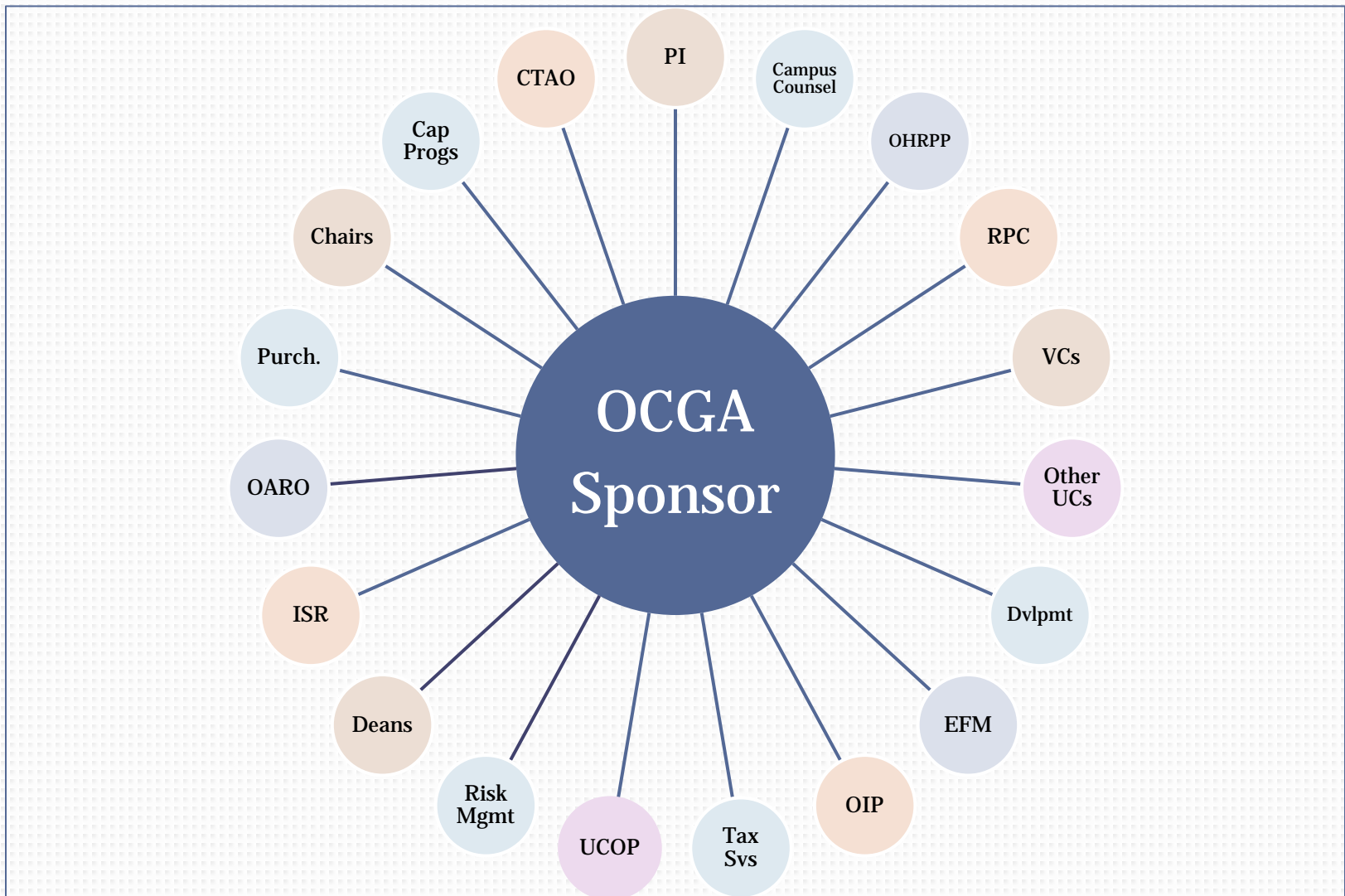
Delays in Award Set-Up

- \$21M of awards (174) currently on hold waiting for Department or PI response
- FY14 median award processing time:
 - 9 days -- complete proposal record
 - 13 days -- PI/Department information missing
- 46% of all awards in FY13 required additional information from the Department or PI before set-up
- 10% of awards (\$88M) in FY13 received for proposals submitted without institutional approval (No department, DRA or OCGA approval)

Increasing Complexity of OCGA Transactions

- Increasing percentage of non-routine – one-of-a-kind or few-of-a-kind transactions
- Complex transactions require coordination with campus experts:
 - Intellectual Property
 - Development
 - Risk Management
 - UCOP
 - General Counsel
 - Humans/Animals
 - Export Control
 - Conflict of Interest
 - PI/Department

Complex, Coordinated Collaboration



What are Other UC Campuses Doing?

Berkeley – Hard Line

- Must be complete (including internal forms and *all* signatures) or returned
 - Draft and placeholder sections are not acceptable
 - Except scope/research plan
- Five days prior to the deadline
 - Including pre-proposals, white papers, LOI's
 - Incomplete – returned and considered late
- Exceptions require written request for VCR approval – ***can be denied***

What are Other UC Campuses Doing?

Berkeley – Hard Line

- SPO's office hours: 8:00 am to 5:00 pm (M – F)
- SPO reserves the right to process non-compliant proposals only after on-time proposals for day are submitted
- Unreasonable and unfair to expect on-time proposals to be delayed or receive lesser review due to late proposals

What are Other UC Campuses Doing?

Irvine – Hard Line

- Must be complete (including internal forms and *all* signatures) or returned
 - Draft and placeholder sections are not acceptable
 - Except scope/research plan
- Standard Proposals: 5 days prior to the deadline
- Non-standard Proposals: 10 days prior to the deadline
 - Sponsor is not Government, UC, or Domestic Higher Ed.
 - Proposal is a contract
 - Proposal includes Award Terms and Conditions
 - Proposal includes SubAwards
 - Limited Submissions
 - Reduced F&A

What are Other UC Campuses Doing?

Irvine – Hard Line

- Applies to **all** extramural proposals – even if NO signature or institutional concurrence
- Final scope/research plan no later than 8 business hours before deadline time
- First-In/First-Out – no preference for late proposals
- Exception to 5/10 days require written request for VCR approval – ***can be denied***

What are Other UC Campuses Doing?

- Will provide data/feedback to Provost and Deans Council
- Currently reviewing standard/mandatory expectations for proposal completeness
- Currently reviewing OCGA proposal review processes and expectations based on when received
- Finalizing proposal receipt process (via Proposal Intake Team)
 - Proposals@research.ucla.edu

Revised EPASS

- Based on campus and ORA feedback
- Updated Form and Instructions available on the [OCGA Forms site](#)

Revised EPASS

Section 2: Department or ORU

- Added two ORUs to the pick-list:
 - California Center for Population Research (CCPR)
 - Grand Challenges

Department or Organized Research Unit (ORU)		California Center for Population Research (CCPR) California Nanosystems Institute (CNSI) Clinical & Translational Science Institute (CTSI) Ctr for Embedded Networked Sensing (CENS) Ctr for Nanoscale Innovation for Defense (CNID) Ctr for Scalable & Integrated Manufacturing (SINAM) Ctr on Functional Engineered Architectonics (FENA) Grand Challenges Institute for Digital Research & Education (IDRE)
Administering Department Name:	<input type="text"/>	
Account #:	<input type="text"/>	Cost Center: <input type="text"/>
Dept. Contact Name:	<input type="text"/>	Extension: <input type="text"/>
If your department/unit has a single e-mail address for all proposal/award related correspondence, please enter it here: <input type="text"/>		
Affiliated with Center/ORU: <input type="text"/>		
If "Other Center/Institute" is selected above, please specify name, or if multiple Center(s)/Institute(s) please add additional selection(s) here: <input type="text"/>		

Revised EPASS

Section 5: Sponsor Information

- Reorganized fields and provided more information to clarify direct versus prime sponsor
 - Left side: *Sponsor Information (Entity which will provide funding directly to UCLA)*
 - Right Side: *Prime Sponsor Information (Complete this section when UCLA is a subrecipient)*

<p>5. Sponsor Information (Entity which will provide funding directly to UCLA)</p> <p>Sponsor Name: <input style="width: 90%;" type="text"/></p> <p>Sponsor Due Date: <input style="width: 20%;" type="text"/> Time (Pacific): <input style="width: 20%;" type="text"/></p> <p>Deadline Type: <input style="width: 80%;" type="text"/> ▾</p> <p>FOA/RFA/RFP# (if applicable): <input style="width: 90%;" type="text"/></p> <p>Contact (if known): <input style="width: 90%;" type="text"/></p> <p>Email Address: <input style="width: 30%;" type="text"/> Phone #: <input style="width: 30%;" type="text"/></p>	<p>Prime Sponsor Information (Complete this section when UCLA is a subrecipient)</p> <p>Prime Sponsor Name: <input style="width: 90%;" type="text"/></p> <p>Prime Sponsor Due Date: <input style="width: 20%;" type="text"/> Time (Pacific): <input style="width: 20%;" type="text"/></p> <p>Prime FOA/RFA/RFP# (if different): <input style="width: 90%;" type="text"/></p>
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Revised EPASS

Section 6: Proposal Checklist

- Added *Cost Sharing Amount* to cost sharing question(s):

Is any Cost Sharing/Matching proposed in this application? (Do not include unfunded effort or salary cap differential here.)
 If Yes, required by sponsor? Yes (mandatory committed) No (voluntary committed)
 Cost Share Amount: Source/FAU#:

- Human and Animal Subjects; *If yes, indicate “Pending” or IRB #:*

Human Subjects? If yes, indicate “Pending” or IRB#: Delayed Onset
 Are study related patient care costs to be billed to the award OR to a third party payor (i.e. medical insurance/Medicare)? If yes, then a Policy 915 Coverage Analysis is required (refer to www.clinicaltrials.ucla.edu).
 Animal Subjects? If yes, indicate “Pending” or ARC#: Delayed Onset

Revised EPASS

Section 7: Additional Forms Required

- Added clarifying language to 700-U
 - Required for *Research*
 - Hover over help for types of *Research*



Type of Research: Applied Org Research, Basic Org Research, Clinical Research, CT Device, CT Drug, CT Gene Therapy, CT Gov./Non-Profit, CT In Kind, CT PI, CT Other, Dev Org Research, Other Org Research, Research Training or Visiting Scientist

Additional Forms Required		COI (Disclosure Requirements)
Yes	No	Sponsor/Prime Sponsor is Federal Public Health Service (PHS) or agency that has adopted the PHS regulations? If yes, provide names of other investigators on page 3 (See UCLA Policy 926).
<input type="checkbox"/>	<input type="checkbox"/>	
Yes	No	Sponsor/Prime Sponsor is Federal (other than PHS), CIRM or special research programs managed by the UC Research Grants Program Office (RGPO)? If yes, attach COI Form 740 & Supplement to Form 740 (if applicable). See UCLA Procedure 925.3.
<input type="checkbox"/>	<input type="checkbox"/>	
Yes	No	Non-Government Sponsor/Prime Sponsor? If yes and project is Research , attach Form 700-U, 700-U Addendum and 700-U Supplement, as applicable, unless sponsor is exempt. See UCLA Procedure 925.2
<input type="checkbox"/>	<input type="checkbox"/>	

OCGA Master Training Calendar

- Beginning September 2014
- First Thursday of each month
- Kinross 210
- 60 – 90 minute sessions on a focused topic
- Presented by subject matter experts

OCGA Master Training Calendar

UCLA OCGA
Office of Contract and Grant Administration

Master Training Calendar July 2014 - December 2015

First Thursday of the Month*
210 Kinross
*except January 2015 (third Thursday)

September 2014 <table border="1"> <tr><td>Su</td><td>Mo</td><td>Tu</td><td>We</td><td>Th</td><td>Fr</td><td>Sa</td></tr> <tr><td></td><td></td><td>1</td><td>2</td><td>3</td><td>4</td><td>5</td></tr> <tr><td>6</td><td>7</td><td>8</td><td>9</td><td>10</td><td>11</td><td>12</td></tr> <tr><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td></tr> <tr><td>20</td><td>21</td><td>22</td><td>23</td><td>24</td><td>25</td><td>26</td></tr> <tr><td>27</td><td>28</td><td>29</td><td>30</td><td></td><td></td><td></td></tr> </table> <p>Filling out the EPASS: How and Why</p>	Su	Mo	Tu	We	Th	Fr	Sa			1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30				October 2014 <table border="1"> <tr><td>Su</td><td>Mo</td><td>Tu</td><td>We</td><td>Th</td><td>Fr</td><td>Sa</td></tr> <tr><td></td><td></td><td></td><td>1</td><td>2</td><td>3</td><td>4</td></tr> <tr><td>5</td><td>6</td><td>7</td><td>8</td><td>9</td><td>10</td><td>11</td></tr> <tr><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td></tr> <tr><td>19</td><td>20</td><td>21</td><td>22</td><td>23</td><td>24</td><td>25</td></tr> <tr><td>26</td><td>27</td><td>28</td><td>29</td><td>30</td><td>31</td><td></td></tr> </table> <p>Reviewing Program Announcements: What to Look for and When</p>	Su	Mo	Tu	We	Th	Fr	Sa				1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31		November 2014 <table border="1"> <tr><td>Su</td><td>Mo</td><td>Tu</td><td>We</td><td>Th</td><td>Fr</td><td>Sa</td></tr> <tr><td></td><td></td><td></td><td></td><td>1</td><td>2</td><td>3</td></tr> <tr><td>4</td><td>5</td><td>6</td><td>7</td><td>8</td><td>9</td><td>10</td></tr> <tr><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td></tr> <tr><td>18</td><td>19</td><td>20</td><td>21</td><td>22</td><td>23</td><td>24</td></tr> <tr><td>25</td><td>26</td><td>27</td><td>28</td><td>29</td><td>30</td><td></td></tr> </table> <p>When are COI Disclosures Needed?</p>	Su	Mo	Tu	We	Th	Fr	Sa					1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	
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September 2014

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Filling out the EPASS: How and Why

October 2014

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Reviewing Program Announcements: What to Look for and When

November 2014

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When are COI Disclosures Needed?

Click on the topic for details

OCGA Master Training Calendar

- Topic:** Filling out the EPASS: How and Why
- Date:** Thursday, September 4, 2014
11000 Kinross Ave, Room 210 9:30AM-11:00AM
- Presenter:** Patti Manheim
- Summary:** This session will address the background and purpose of the EPASS. We will review and discuss each section of the EPASS with specific examples of questions from users. This session is appropriate for anyone with responsibility for completing, reviewing or processing EPASS forms.
- RSVP:** [Click here to RSVP](#)

New OCGA Staff

Sam Perez, Award Intake/Grant Analyst

- Experience
 - Nine years in OCGA as a Contract and Grant Specialist
 - Comprehensive understanding of OCGA processes and procedures, technical expertise with ORA/OCGA systems

New OCGA Staff

Rae Anne Robinett, Senior Grant Analyst

- Previous experience:
- UCLA Office of Intellectual Property and Industry Sponsored Research
 - Eight years of in-depth and comprehensive expertise in reviewing proposals, negotiating complex agreements.

OCGA New Staff

Shauna Huntsman, Senior Grant Analyst

- Effective June 2, 2014
- Experience:
 - Senior Research Administrator at UCSF
 - Grant and contract proposal preparation and award negotiation
 - UC expertise
 - Solid background in federal and non-profit sponsors

OCGA Staff – Open Positions

- Contract and Grant Officer
- Contract and Grant Specialist
- Assistant to the Director

QUESTIONS