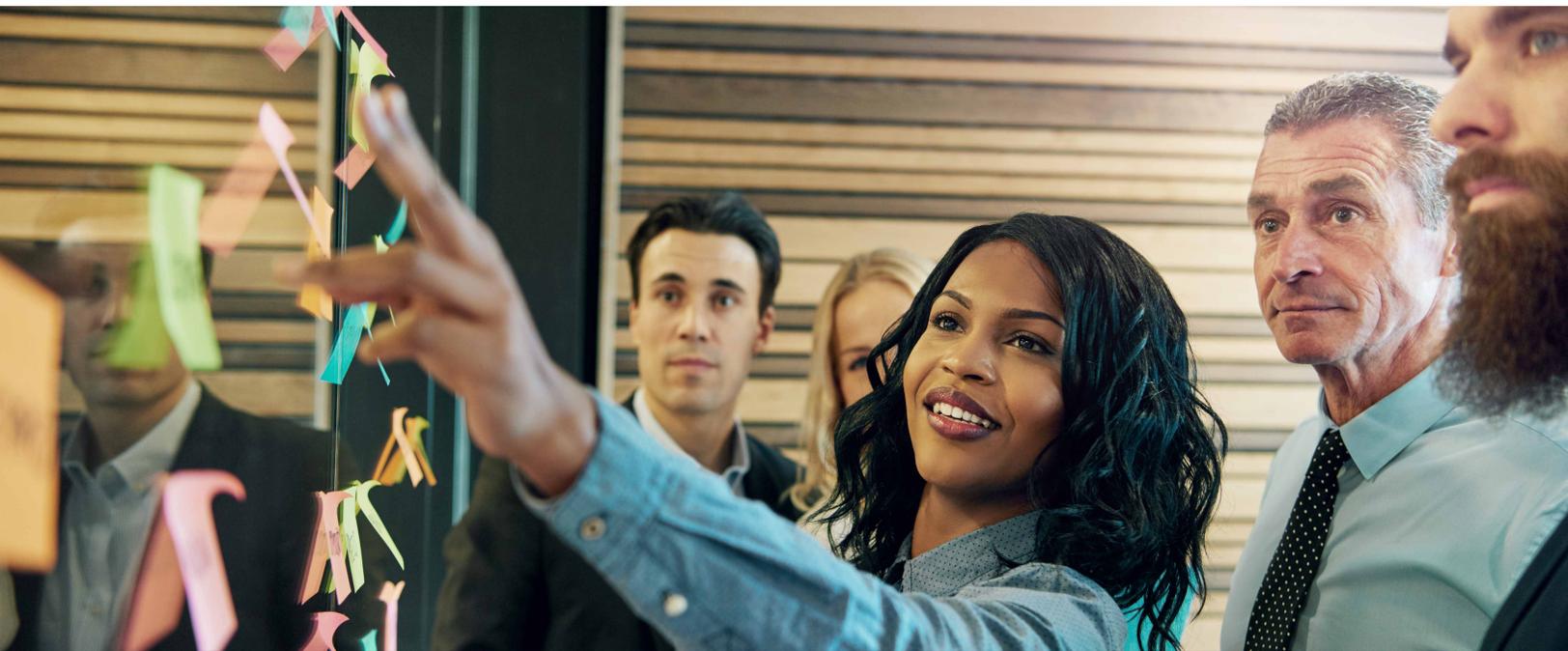


TECHNOLOGY SOLUTIONS CASE STUDY



UVA Research Launches Huron Grants and Agreements for Comprehensive Proposal, Award, and Agreement Lifecycle Management

UNIVERSITY OF VIRGINIA

Founded in 1819 by Thomas Jefferson, the University of Virginia (UVA) is a public research university located in Charlottesville, Virginia. UVA has approximately 17,000 undergraduate students, 8,700 graduate and professional students, and 17,400 faculty and staff. It provides 100 master's degrees in 52 fields and 70 doctoral degrees in 51 areas. The University is currently growing five strategic research areas: democracy, environmental resilience and sustainability, precision medicine, the brain and neuroscience, and digital technology and society.

UVA researchers received 2,207 awards for sponsored research in 2021. In April 2022, The Princeton Review ranked UVA as the best public or private university in the country for financial aid and the #3 best-value public school. In May 2022, *Money* magazine ranked UVA the #3 best-value college in the United States.

INITIAL GOALS AND SELECTING HURON GRANTS AND AGREEMENTS

In 2015, UVA's Office of Sponsored Programs launched a custom-built electronic research administration application named ResearchUVA. Over time, UVA's research community sought more modern functionality than the homegrown application could provide. The University required an enterprise system that could capture more meaningful data, provide tools for proposal preparation, enable system-to-system proposal submission, and provide workflow to simplify the grants proposal process and support UVA's growing research portfolio. However, it was clear that modernizing the existing ResearchUVA application posed too great of a burden and cost to be a viable solution.

In January 2019, UVA published a request for information (RFI) to explore potential enterprise research administration (ERA) solutions and received proposals from six leading vendors. Research administration stakeholders convened a selection committee of research community representatives, including department leaders and senior research administrators representing various schools and mini business units. The team, with substantial community input, evaluated vendor proposal responses to narrow the list, inviting three vendors to demonstrate their products.

As a result of the demonstrations and conversations with colleagues at peer institutions, the UVA selection team found the Huron Research Suite to have the most intuitive user interface and a strong track record of successful deployments at peer institutions. The Huron applications also integrated with Workday Financial Management; UVA implemented the Workday HCM system in 2020 and Financial Management in July 2022. UVA chose to license the SaaS versions of Huron's Grants and Agreements modules, intending to deploy additional Huron Research Suite modules over time.

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IMPLEMENTATION AND ROLLOUT

UVA branded the Huron solution as ResearchUVA Powered by Huron (PBH). The UVA team established a robust project governance structure, including a steering committee that oversaw the implementation, which was supported by a project management team. A separate grants and agreements team of functional experts helped configure the system and manage

end-user training. The core project team identified project champions (research faculty and senior research administrators) who participated in meetings to provide feedback on system requirements and configuration. The champions also communicated system updates to their departments and teams. From the start of the project, the ResearchUVA PBH team also sent out monthly newsletters to communicate project updates to the user community.

Alongside the Huron Grants and Agreements deployment, UVA's finance team was transitioning from a legacy accounting system to Workday Financial Management. UVA had committed its internal change management and communications resources to the Workday project, so the ResearchUVA PBH team engaged Huron's change management services to support the Huron Grants and Agreements deployment.

It took UVA approximately 13 months, starting in the spring of 2021, to deploy Huron Grants and Agreements. Huron provided the UVA core project team with an initial deep dive into the platform's capabilities using simulations of business use cases to demonstrate system functionality. The core project team worked closely with the project champions, a Huron team lead, and Huron subject matter experts to configure the system and leverage Huron's templates to migrate data from the legacy system to Huron Grants and Agreements.

The project team created a robust training infrastructure with a website to centralize learning and reference materials in several formats, including demonstration videos that cover various functions in the system, user reference guides (step-by-step written instructions), job aids (succinct how-to instructions for specific tasks and activities in the system), checklists that guide users through filling out form pages, and instructor-led training (live sessions recorded for on-demand viewing).

Before going live, the core team met with UVA business units to present the system and discuss future business processes. UVA launched Huron Grants and Agreements on April 25, 2022, enabling faculty and staff to begin working as registered users in the system for all grant pre-award tasks. Post go-live, the ResearchUVA PBH team established a support structure, providing office hours and help desk support. The team also created a support email address that automatically generates a ticket in the support system for incoming emails.

REPORTING AND ANALYTICS

While the UVA research team deployed Huron Grants and Agreements, it also stood up a sponsored programs data warehouse to support the unprecedented amount of data the Huron system captures. The UVA research community is working to improve reporting for institutional, unit-level, and individual needs. The project team worked with Huron to build an initial set of reports, and now that the system has been launched, users are identifying

additional data points they would like to report on. UVA Manager of Electronic Research Administration Debby Kessler works with Huron to add new tables to reports.

To enable accurate and comprehensive reporting, the ResearchUVA PBH team plans to launch a major initiative to backfill data in the University's converted records. UVA Executive Director of Sponsored Programs Stewart Craig says that backfilling the migrated data will be a heavy lift, requiring UVA to hire outside support. The team is also looking forward to integrating Huron Grants and Agreements with Workday Financial Management, which will cut down on duplicate manual data entry. Later in 2023, UVA plans to deploy the Huron Conflict of Interest and Employee Compensation Compliance modules.

BEST PRACTICES AND LESSONS LEARNED

UVA's robust and comprehensive internal project governance structure has been critical to the success of the Huron system's deployment. Kessler notes that the dedicated project team drove the system configuration, validation testing, and training of end-users, enabling a smooth rollout. Since launching the Grants and Agreements module, the core team has continued to meet voluntarily to work through issues related to their business processes and the new Huron and Workday solutions.

Craig and UVA Senior Director of Electronic Research Administration Vonda Durrer report that during the implementation phase, it has been difficult to fully comprehend how early configuration decisions will affect future process outcomes. UVA purchased five customizations in the initial Huron contract, which forced the team to be disciplined in adapting business processes to the solution's standard functionality. As the project progressed and the group gained a clearer understanding of the system's capabilities, they often re-evaluated customization decisions and made changes to their initial configurations.

Another challenging aspect of the Huron implementation has been the data conversion process from the legacy system into Huron Grants and Agreements. Huron provided data migration templates that the UVA team tailored to fit their requirements. Durrer recommends that institutions spend time with Huron to understand the data migration template fields, calculations, and outcomes, especially related to migrating budgets. Data migration is a lengthy process, and as UVA migrates its proposal information, the University has transitioned its legacy ResearchUVA platform to a view-only system, enabling users to download documents from the legacy platform to upload into the Huron system.

REALIZED BENEFITS OF HURON GRANTS AND AGREEMENTS

Craig reports that as users adapt to Huron Grants and Agreements, they are experiencing efficiencies from the system's workflow, electronic routing, and data capture capabilities.

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The UVA research administration community has replaced legacy processes that relied on email correspondence with consistent electronic processes that track communications related to proposal submissions and agreements, centralizing associated documentation. The Huron Agreements module provides transparency into bilateral negotiations by tracking internal and external communications and agreement versions. UVA also integrated DocuSign with the Huron system to streamline the signature process.

In the past, UVA investigators submitted sponsored project proposals through individual sponsor systems. Huron's system-to-system proposal submission functionality saves investigators time by automating components of proposal preparation and, for Grants.gov proposals, submission. Huron Grants provides electronic routing for internal review and transparency into the proposal's status. The Huron system automatically validates and submits proposals directly to Grants.gov.

Craig notes that Huron's workflow makes ancillary reviews easier to manage by centralizing projects in a workspace accessible from user dashboards and automatically notifying reviewers of their assigned proposals. Investigators from different departments and schools can more efficiently collaborate on a proposal through Huron's "study teams" functionality.

The Huron Grants and Agreements solutions use tags to connect the activities for proposals, awards, and agreements, linking them to University programs and investments. Over time, UVA will be able to access insight into how financial data and success rates relate to programmatic activity.

REFERENCES

For this research, Tambellini interviewed University of Virginia Executive Director of Sponsored Programs Stewart Craig, Senior Director of Electronic Research Administration Vonda Durrer, and Manager of Electronic Research Administration Debby Kessler. Tambellini also used publicly available information.

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The purpose of this report is to provide higher education institutions with information about the objectives, solutions, and outcomes related to the utilization of technology in colleges and universities across the US.

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