Kuali Research

There and back again …

a university tale

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Utah State University – (until Aug 5th)

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Land-grant, public research university

- 27,679 students enrolled (includes regional campuses, distance education, and USU Eastern)
  - 24,618 undergraduate students (15,959 Logan campus)
  - 3,061 graduate students
- 2018 Campus Sponsored Awards = $112M
NSF Research Expenditures FY14-FY17

<table>
<thead>
<tr>
<th>Year</th>
<th>Millions of Dollars</th>
</tr>
</thead>
<tbody>
<tr>
<td>2014</td>
<td>$169.6</td>
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<tr>
<td>2015</td>
<td>$175.4</td>
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<tr>
<td>2016</td>
<td>$180.6</td>
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<tr>
<td>2017</td>
<td>$187.3</td>
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- USU Campus
- USU Research Foundation

Note: The highlighted area in 2017 represents $94.2 million.
PARC

- What we started with
  - Database
  - Homegrown
  - Limited functionality
  - No electronic routing
- Result: paper-based system; required someone to run around collecting signatures

- Internal to Sponsored Programs
- Result: campus units maintained shadow systems
New Director – New System

- Charged with finding a system that:
  1. Made routing/approval process electronic
  2. Created transparency for campus
  3. Cost-effective
  4. From a Cayuse 424 school (prior)
Evaluation Process

- 2 year evaluation
- Cost
  - Storage, annual fees, lacking IT support
  - New IT model — minimize spinning disks
- Comprehensive
  - Other compliance modules available (COI, IRB, IACUC, etc.)
- Functionality
  - Intuitive — think TurboTax!
- Ease of use, electronic routing (no sneakers)
- Reputation
- Reached out to other schools
- Campus involvement
- Invited campus to attend demonstrations from various vendors
- Selected Kuali
History

- Demo (Kuali Coeus) — open source (MIT)
- Rsmart vendor
  - Offered cloud-based “Kuali Coeus”
  - USU in bid process
- 2014 Kuali Foundation & Rsmart
  - To become Kuali Company
  - “Kuali Research”
- USU in purchase
What is Kuali Research

- Database and user interface
- Auto-populate data from Banner
- Internal routing
- S2S to grants.gov
- PI
  - Proposal and Award history
  - Generate grant inside
- Route for review
- Complete package
  - SPO
  - COI
  - IACUC
  - IRB
- No Hardware (really!)
Picked Kuali Research

- Signed contract October 2014
- Hired Dan — December 2014
  - Software engineer, software program manager, trainer
- Operational October 2015 to SPO and managers
  - Internally operating for 1 full year (duplicate systems)
- A few “early implementers” — internal college routing
- Full to campus & faculty in February 2017
- All routing in place
Kuali Modules – USU Campus live

- Feb. 2017 — SPO
- Feb. 2018 — COI
- April 2018 — IACUC
- July 2018 — IRB (standby)
- Yet to come:
  - IBC, export control, negotiations, animal population management,
Surprises

- Kuali Research — Early for prime time
- Move was easy, data can be dirty
- Works well with us (after 1st year)
- Reports — what reports?
- Internal SPO — the system can do tracking that we never thought of
- Care at Award setup to maximize productivity

- Teaching of modules — teach KualiCo how modules need to work
- Faculty not interested in training — faculty were not into system until later
- T&E — effort-based personnel budgets
Contract today: $110K per year — Research Expenditures

Good for 5 years — 3% per-year increase

Software Engineer/Analyst (Not SPO)

Teacher, interface, banner, Kuali, troubleshoot
Kuali Research – Improvements Needed

- Self-improvement needed
- Budget module — T&E centric
  - Need a “back in” module
- “IBM 3270” like notification
- Workload balancing in SPO
- Reports (or none)
- S2S — better error reporting needed
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