

# Increased Transparency. Increased Trust. Increased Engagement. Doubling submissions for LSU's Office of Research

*An InfoReady Case Study with Louisiana State University*



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## *An InfoReady Case Study*

One of the key questions research administrators often ask when considering automating processes in a system like InfoReady is “Just how difficult is it to engage faculty and administrators and gain their trust?”

When Louisiana State University (LSU) needed an automation platform to solicit and review an increasing volume of grant applications for limited submissions, they turned to InfoReady. When asked about getting the campus engaged with it, here's the response of Stephen D. Beck, Ph.D., Associate Vice President in LSU's Office of Research and Economic Development:

“When we got the license we thought ‘let's try the review process’ and so we manually added all our submissions to the system. Then we simply distributed it to our reviewers who were members of the Council on Research. We did zero training, other than telling them to rank submissions from one to five, with one being best. That's all we did because, honestly, we felt InfoReady was pretty straightforward, and the feedback we got from reviewers confirmed our assessment. It was the same situation with faculty, largely because InfoReady was such a dramatic improvement compared to our previous automated processes, which were admittedly awful. What we found is that faculty know filling out a form is easy. What's [been historically] difficult is keeping up with the amount of regular email that comes from administrative offices. Even for faculty really diligent about organizing their email, it's almost impossible to keep things together. So initial acceptance was so tremendous we didn't feel any faculty training was necessary.”

Stephen goes on to add that “While we currently use InfoReady for our entire internal grants and competition portal, we started off working just with limited submissions and faculty awards. That proved so successful we've expanded its use to our internal grants programs, including travel grants, research grants, and managing and routing administrative approvals that don't flow through our electronic research administration platform – for example, F&A waivers and cost sharing approvals.”

“We also found that InfoReady’s Engagement Hub [Scale] is an excellent way of providing a more visual interface for our limited submission competitions, so we link it to our website and it provides a an easy way for people to instantaneously see what’s available in the limited submissions arena.”

Similar to most university research offices, LSU’s Office of Research and Economic Development bears responsibility for managing the selection processes for any limited submission program for which a faculty member or researcher chooses to apply. These processes include collecting letters of intent, identifying and collecting pre-proposals, identifying the reviewers, reviewing the pre-proposals and selecting the highest ranking one, and then notifying the Office of Sponsored Programs on who is eligible to submit to that particular limited submission. These multi-step processes are not only arduous and time-consuming when done manually, but rife with issues – from unopened email to errors, missed deadlines, and lack of transparency, to name a few.

“Working in a part of the office oriented around proposal development,” adds LSU’s Kristopher M Mecholsky, Ph.D., Associate Director of Research Advancement, “one of our tasks is identifying funding opportunities, particularly limited submission competitions. My colleague Kelly Robertson began by reviewing all opportunities and checking, first, their status as limited and then their initialization date, letter of intent, and other deadline dates. That allows us to develop a review process and timeline that’s customized to the particular process. For example, the Department of Energy has recently been sponsoring competitions due within a month or so of announcement. With that kind of extremely short turnaround, it’s easy to understand why InfoReady’s automated platform is so critical to structuring the information we’re asking from researchers, ensuring reviews and rankings are quickly completed, and internally announcing the successful proposals. Clearly, using email, manually produced documents, and spreadsheets are non-starters in this kind of competition time frame.”

**What about tips to boost compliance and participation?** Stephen reports that using standard faculty login and email addresses are helpful in eliminating barriers and Kris adds several other suggestions: “We learned that announcing funding opportunities, including limited competitions, was best done via weekly aggregate communications rather than announcing each one individually – which quickly led to email fatigue. We also make a point of directly communicating opportunities to the researchers who may be most interested in them. Over the past several years, too, we’ve developed a flowchart that helps us both standardize our processes or adapt them to unusual circumstances when necessary – as in an unusually brief response window.”

“The flowchart helps us identify when exactly we need to be announcing these limited submissions. Sometimes we’ll know about a limited submission competition years in advance, more often at least several months in advance, but occasionally, as with the DOE,

that can be just a month, so the flowchart is really helpful in tracking whether we can allow researchers leisurely time to submit a letter of intent or there's a more stringent deadline, how quickly we need to identify and secure reviewers and their deadlines, and ultimately make the award."

"If there's a much shorter turnaround, we might only be able to do what we call 'first notify,' which is just that: If you if you see it first, you get that spot, and so this system helps us determine when that approach is justified."

"In my tenure with the Office," continues Kris, "there's no question that InfoReady has greatly increased our capacity, and part of that is because we can replicate competitions year after year and keep track of them. Being able to replicate many recurring limited submissions means we're able to devote our time and resources to digging deeper to identify more limited submission competitions and funding opportunities."

From a Research VPs perspective, success in limited submissions and other kinds of competitions is a function of:

- identifying opportunities
- making investigators aware of those
- ensuring correct and timely letters of intent and proposals
- identifying willing reviewers and securing their commitment to timely review and ranking
- award notification and submission follow-through

"That may not seem like a complicated and ungainly process," says Stephen Beck, "but without InfoReady's automated platform, that's precisely what it is. The reason is because email is a singular point of failure. Messages get lost, missed, or buried, as well as being difficult to track and document. When the inevitable glitches occur – letters of intent lost, pre-proposals lost -- that in turn leads to faculty mistrust of the process and, worse, the results. It wasn't that people thought the process corrupt, but transparency was lost, and with it, trust."

"Another significant issue for us was getting reviewers to meet in person, which is both time-consuming and sometimes not even possible given the difficulty of synchronizing faculty schedules in a timely manner. The amount of administrative time attempting to make that possible can be considerable, too – time obviously better spent on other more productive tasks. Once we started using InfoReady, we were collecting data through a portal and it made the collection easy to document, easy to track, easy to archive, and easy to search. Importantly, too, it helped us maintain consistency in recurring competitions. And perhaps even more importantly from the University's perspective, InfoReady made it possible for us to significantly increase the number of competitions we could manage,

ultimately expanding faculty interest and participation and, we believe, enhancing the likelihood of our awardees receiving external funding.”

“Increasing faculty participation in our case wasn’t simply a function of the InfoReady system but what the system makes possible. For example, we found that automatic email responses when faculty submitted a document like a letter of intent or a pre-proposal were especially helpful because they provided a real sense of transparency to the process. Even though investigators understood it was the system responding, not a human being, they were confident that simply because there was a system in place, someone would actually read the submission, proposal, or letter of intent.”

“Another systemic benefit of InfoReady,” continues Stephen, “lies in allowing asynchronous reviews instead of requiring reviewers to meet in person. So reviewers do the work at their leisure and simply submit their reviews back to our office, after which there would be a discussion and final decision on the selected candidate or proposal. Faculty immediately embraced this process, user satisfaction increased, and the general trust in our office the belief that we were fair and consistent – increased. That was huge!”

“In terms of productivity, InfoReady significantly increased our capacity to handle opportunities and manage applications, and the numbers are impressive: From 2017 through 2020, the number of limited submission competitions we managed increased by 91% and the number of applications received by 92%. Just as impressively, even though applications rose significantly, we not only managed those without adding additional staff, but were able to reduce the number of staff working on limited submissions and redirect them to other important work in the Office.”

**What about recommendations to research administrators not yet using an automated process?** Stephen says “It’s probably pretty obvious we’ve found managing competitions by email is not a good idea; it breeds mistrust and complicates life for administrators. Automated processes, on the other hand, enhance faculty trust in transparency of the process and increase engagement.”

“We’ve also learned that using an automated portal system like InfoReady enables support for auditing, longitudinal data, and replicating annual activities. And its strong User Interface (UI) and User Experience (UX) capabilities lead to happier end users, reviewers, administrators, more participation, and more faculty trust in the research office. Overall, InfoReady was the right decision for LSU and we couldn’t be more pleased!”

*To learn more about InfoReady, schedule a demo, or get in touch with current InfoReady platform users, contact Amanda or Max at the contact info below.*

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