ACRA Breakout Session

Onboarding a New Grants Administrator (Dept. Admin.)

July 25, 2016

<u>Top Suggestions (voted on by working group):</u>

- Know what systems people will need to use and the access people need:
  - SAP/BUWorks—reporting, shopping carts, etc.
  - Concur
  - Student Payroll
  - Sponsor System Access (grants.gov folder, eRA Commons, FastLane)
- Budget templates and descriptions
  - General purpose BU budget
  - Task based budget template would be helpful
  - Terminology: what is IDC, F&A; how to calculate salary; how to calculate cost share. These are particularly helpful for those who are new to budget development.
- Have a buddy system or peer mentoring system.
- OSP introduction to grants administration: lifecycle overview
  - This group would be able to form a cohort for following on training sessions and to learn from/connect with each other so they don't feel isolated in their role (sometimes they are the only one in their role in the school/dept.).
  - Have HR provide a download of new hires to OSP to generate the list. If a staff member is being promoted in to the role from within, the home dept/college should notify OSP.
- A list of who to contact and their contact information, along with a list of helpful websites.
- Much of the onboarding needs to be done at the school/college/department level then tying in to the University resources available. Perhaps schedule a working group on what onboarding tools are in place locally and then share best practices to have a somewhat standard onboarding procedure.

<u>Complete List of Suggestions:</u>

- What level are you hiring in to (admin assistant, grants administrator, financial manager, etc.) and what training is needed for that level? Provide a comprehensive list of training options, then mix and match to the new hire's role.
- Step by step guidance documents for forms and processes
- WHAT AND WHERE are the resources that can be used (websites are spotty, some with broken links, some with outdated information, some is hard to find)---new comprehensive research website may help alleviate this.
- Eliminate "BU Speak" when possible or provide a glossary of commonly used acronyms or phrases (e.g. OTD, Crosstown)

- Training should be done in a series, especially for BUWorks
    - Have an introductory session on a topic, i.e. journal entries, then a pre-scheduled follow up meeting for six weeks or two months later for those registered so they can have more hands on time or a better understanding once they have tried (and often failed) to use the tools.
- Have “cheat sheets” whenever possible.
- Find knowledge leaders in the departments or schools for deeper, hands-on training. Utilize resources that are available.
- Onboarding book.
- BUWorks training sessions for individual schools/colleges
- Detailed course on reporting