

Transition to Kuali-Coeus (KC)



Presentation to
Business Managers Group
November 30, 2015





Transition to Kuali-Coeus Software

- After extensive consideration, a growing number of USM institutions are committing to the transition to a **cloud-based Kuali-Coeus** system UMB, UMCP, UMCES, UB, UMUC, UMES, Towson University and Salisbury University.
- This USM alignment presents a unique opportunity for UMBC to benefit from a system-wide initiative by committing to buy into the initial implementation and annual license and thus becoming part of a USMwide network. KualiCo https://www.kuali.co/
- Advantages to our campus include **sharing of resources** (for implementation and operation), **cost savings** to implement and run the KualiCo system, and **enhanced support** of **multi-disciplinary and multi-campus integration of research**.















KC Draft Implementation Schedule

- Outreach & Awareness (Sept 2015 Mar 2016)
- Develop Project Plan (Dec 2015 Mar 2016)
- Implement Project Plan (Mar 2016 Sept 2017)
- Project Closeout/Review (Sept Dec 2017)



KC Work Group

CAHSS Linda Brown (Deb Geare)

Carlo DiClemente, Sarah Chard, Rachel Brubaker

Centers Danita Eichenlaub

CNMS Michael Summers

COEIT Gina Fischer & Lee Blaney

DolT Anthony Finneran, Stacy Long

OVPR Stan Jackson, Tim Sparklin and Dean Drake



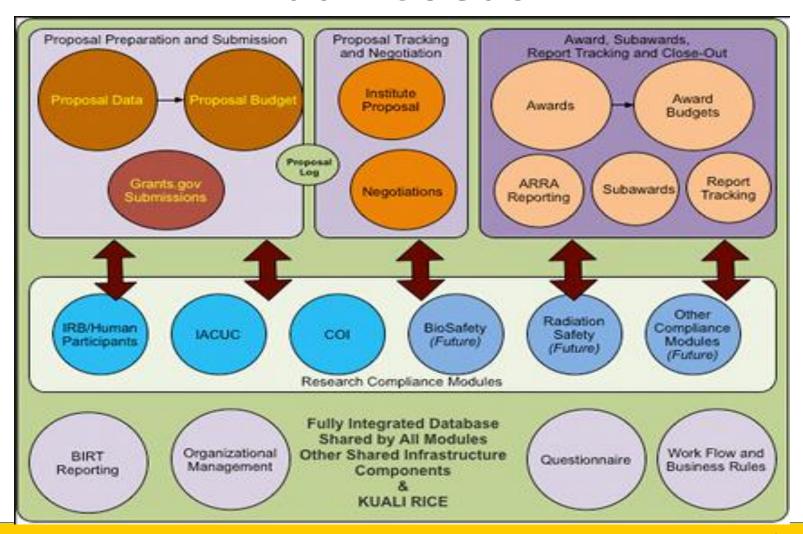
KC Implementation

Outreach & Awareness

Proposed	Actual	Group	Comments
Date	Date		
??		President's Council	
??		Council of VP's and Deans	
??		Council of Provost & Deans	
??		Faculty Senate	
11/13/15		Research Council	
9/21/15	9/21/15	Center Directors	Went well. Questions added to FAQ
10/21/15	10/21/15	Research Admin Group	
10/12/15	10/12/15	ERP Planning Committee	
10/5/15	10/5/15	Institutional Review Board	Tim presented well received.
10/16/15	10/16/15	Post Award Steering Comm	
10/14/15	10/14/15	Institutional Animal Care and Use Committee	
11/30/15		Campus Systems Executive Committee (CSEC)	
9/10/15 &	9/10/15 &	OSP	Just one of several
10/15/15	10/15/15		
??		VPR Team	
12/1/15	12/1/15	Business Managers	
11/12/15	11/12/15	Dean's Chair Meetings - CAHSS	



Kuali Coeus





Benefits of KC

- Integration
 - USM
 - Compliance, sub-recipients, MTA's and NDA's
 - Multiple UMBC Units
 - -PS
- Highly configurable
 - Will grow with us
 - Entry or experienced user
- Cloud Hosted by KualiCo



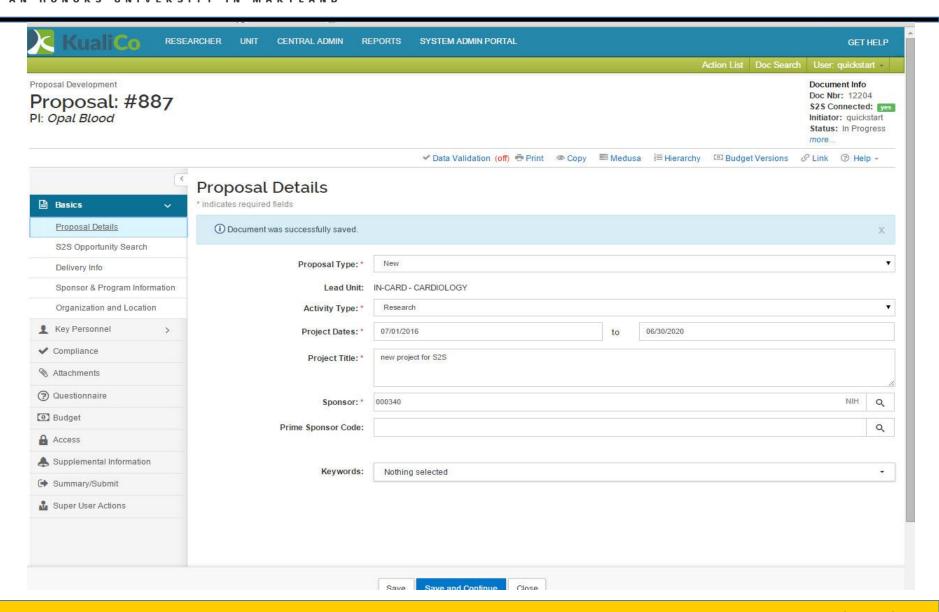
Benefits of KC

Proposals (Increased Quality and Quantity)

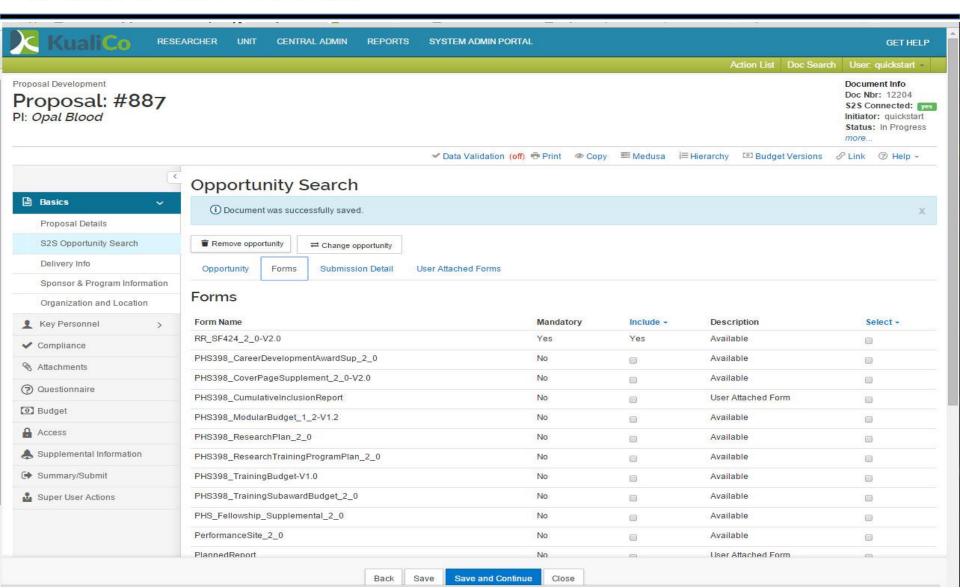
- S to S automated submission
- Standard work space for proposal development
- Security at proposal level
- Co-I Recording
- Automated validity checks
- Dual routing
- Remove Duplicate Entry
 - Bios, Current & Pending ,HR, Budgets, Cost share

- Common multi user proposal development workspace
- Automatic Uploads of sub budget with NIH R&R Form
- Internal controls/data integrity
- Reduced duplicate entry
- Greater Flex and tracking
 - OSP Status when unit starts
 - Work on research while routing
 - Lock/mark components as final
 - Flex rejects (full, partial, etc.)

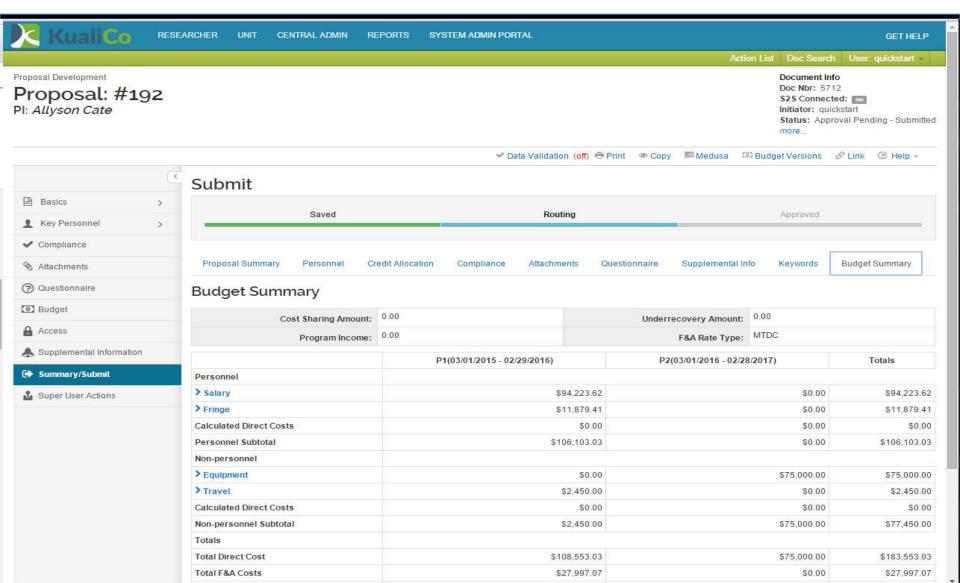


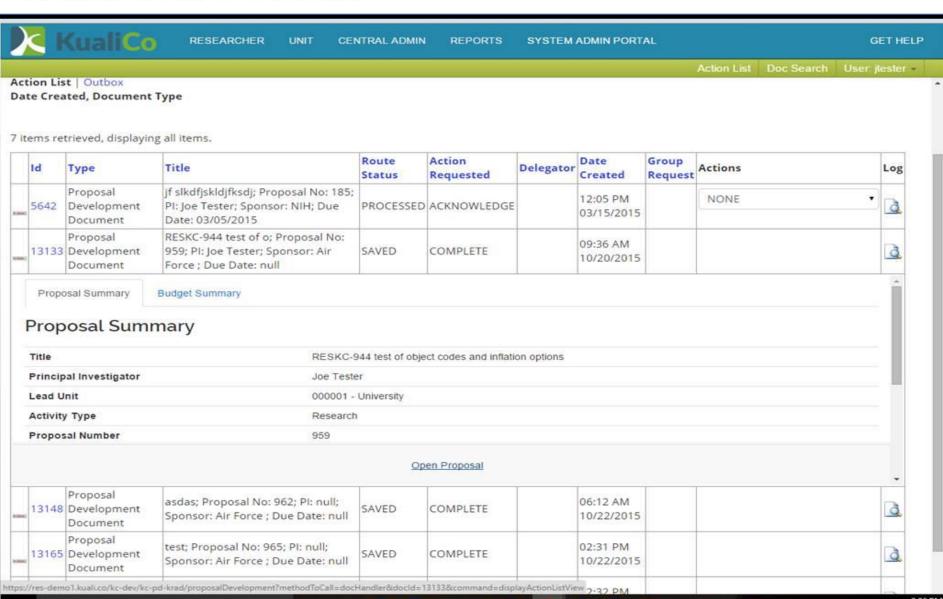




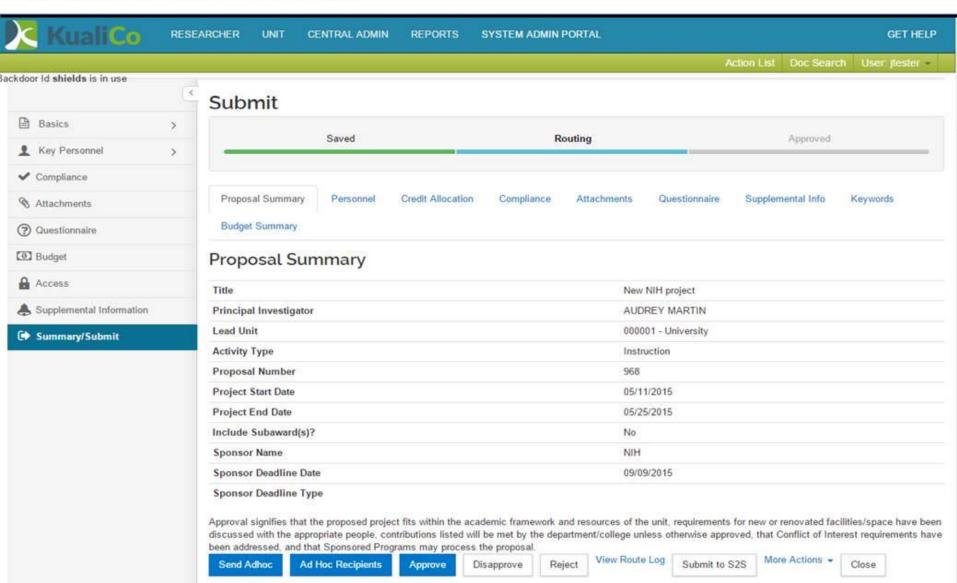












Proposal Summary

Personnel

Credit Allocation

Compliance

Attachments

Questionnaire

Supplemental Info

Keywords

Budget Summary

Budget Summary

Cost Sharing Amount:	0.00	Underrecovery Amount:	0.00
Program Income:	0.00	F&A Rate Type:	MTDC

	P1(01/01/2016 - 12/31/2016)	P2(01/01/2017 - 12/31/2017)	P3(01/01/2018 - 12/31/2018)	Totals
Non-personnel				
> Equipment	\$6,000.00	\$6,000.00	\$6,000.00	\$18,000.00
> Travel	\$1,000.00	\$1,030.00	\$1,060.90	\$3,090.90
> Other Direct	\$3,000.00	\$3,030.00	\$3,060.90	\$9,090.90
Calculated Direct Costs	\$972.00	\$986.58	\$1,001.60	\$2,960.18
Non-personnel Subtotal	\$10,972.00	\$11,046.58	\$11,123.40	\$33,141.98
Totals				
Total Direct Cost	\$10,972.00	\$11,046.58	\$11,123.40	\$33,141.98
Total F&A Costs	\$1,680.00	\$1,696.80	\$1,714.10	\$5,090.90
Totals Subtotal	\$12,652.00	\$12,743.38	\$12,837.50	\$38,232.88

F&A Rates



Benefits of KC

Pre-award & Nonfinancial Post-award

- Agreement Management
 - Negotiation tracking
 - Houses templates
 - Direct email to file
 - Non financial Agreements
- Greater system access & data integration (ORPC, OTD, Units, PI)
- Integrated Subaward System
- Improved Relationships

- Established:
 - Reporting
 - Training Programs
 - USM Resource availability
- Key Word search
- Captures anticipated funding
- Control over data w/o financial impact
- Unit level Reporting
- Paperless Office
- Automated notifications



Award Version	Principal Investigator	Lead Unit	Proposed Sponsor	Proposed Start Date	Proposed End Date	Total Costs	Action
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▼ Node: Current Action							
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	Version: 1			Account Type:			
	Award Status: Active			Activity Type: Rese	arch		
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→ nide Sponsor							
		Sponsor ID: 000340				Prime Spon	isor:
		Sponsor Award ID:				CFDA Num	ber:
		Modification ID:		NSF Science Code:			
Sponsor Funding Tran	sferred						
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Project End D	ate: 06/30/2020			Obligation End Date:	06/30/2020	E	
Execution D	ate:			Modification Date:		1	
Anticipated Di	rect: 955,413.82			Obligated Direct:	183,976.34		
Anticipated	8A: 70,299.31			Obligated F&A:	13,241.20		
Anticipated To	otal: \$1,025,713.13			Obligated Total: \$	197,217.54		



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Version:	1			* Subrecipient:	000084 General Atomic	cs Company		
Start Date:		=		End Date:	£[=		
* Subaward Type:	Grant ▼			* Purchase Order ID:	pa-5685-11			
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* Requisitioner User Name:	cbernal	© II		Requisitioner Unit:	000001	90		
	CONCETTA BERNAL				University			
Archive Location:				Closeout Date:	Ř	E8		
Comments:		-6 -6						
Obligated Amount:	50,000.00			Anticipated Amount:	100,000.00			
Amount Released:	10,000.00			Available Amount:	40,000.00			
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		Period 1 07/01/2015-06/30/2016	Period 2 67/01/2016 - 06/30/2017	Period 3 07/01/2017 - 06/30/2018	Period 4 07/01/2018 - 06/30/2019	Period 5 07/01/2019 - 06/30/2020	
Personn	nel IDIT						
▶ show	Salary	36,452	.73 0.00	0.00	0.00	0.00	36,452.73
▶ show	Fringe	(Oversidden amount) 0.	0.00	0.00	0.00	0.00	0.00
▶ show	Calculated Direct Costs	0	.00 0.00	0.00	0.00	0.00	0.00
	Personnel Subtotal	36,452	.73 0.00	0.00	0.00	0.00	36,452.7
Non-Per	rsonnel TOTA						
▶ show	Equipment	58,132	.87 0.00	0.00	0.00	0.00	58,132.87
▶ show	Travel	9,000	.00 0.00	0.00	0.00	0.00	9,000.00
▶ show	Participant Support	60,000	.00 0.00	0.00	0.00	0.00	60,000.00
▼ hide	Other Direct	14,645	.00 0.00	0.00	0.00	0.00	14,645.00
	Electrical Components	12,000	0.00	0.00	0.00	0.00	12,000.0
	Professional Services	800	0.00	0.00	0.00	0.00	800.0
	Raw Materials	1,845	5.00 0.00	0.00	0.00	0.00	1,845.0
▶ show	Calculated Direct Costs	5,745	.73 0.00	0.00	0.00	0.00	5,745.73
	Non-Personnel Subtotal	147,523	.60 0.00	0.00	0.00	0.00	147,523.6
Totals							
	TOTAL DIRECT COSTS	183,976	.33 0.00	0.00	0.00	0.00	183,976.3
	TOTAL F&A COSTS	(Overridden amount) 13,241.	21 0.00	0.00	0.00	0.00	13,241.2
	TOTAL COSTS	197,217	.54 0.00	0.00	0.00	0.00	197,217.5



Award/Expense Summary

▼ hide		
1		
Account ID:	123456	
Budgeted:	0.00	
Pending:	0.00	
Income:	0.00	
Expense:	0.00	
Available:	0.00	
	Account ID: Budgeted: Pending: Income: Expense:	Account ID: 123456 Budgeted: 0.00 Pending: 0.00 Income: 0.00 Expense: 0.00

send notification close



Sample Built in Proposal Reports

□ Proposals by Sponsor: What institutionally approved proposals have been submitted to
one or more specific sponsors for funding? What is my involvement in one or more specific
proposals that are being reviewed by sponsors?
□ Proposals by Proposal Type: What kinds of activities are supported by external
funding, such as the amount of research vs. training programs? What trends do we see
over different time periods?
□ Investigator History: For specific individuals, what is their current and past sponsored
program activity?
□ Proposals by Lead Unit: What proposals have been institutionally approved by unit?
What does sponsored program activity look like for the unit or units under my purview?
□ Funding Status: What proposals are currently funded? How much funding is projected?
How much indirect cost is likely to be generated?

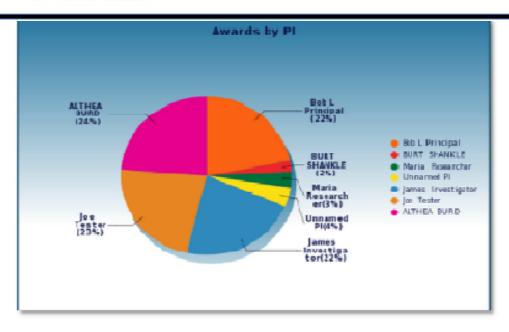


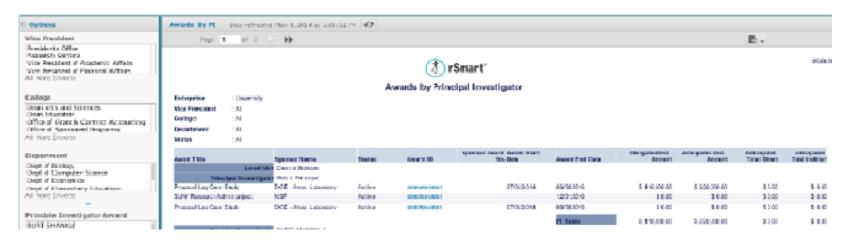
Sample Built in Award Reports

Active Awards: What proposals are active currently? What are the award percentages

received by Pis across the entire institution?
□ Awards by Principal Investigator: What award information is specific to me?
□ Awards by Sponsor: I need a list of active awards by sponsor within each unit?
□ Awards by Sponsor Type: What are the categorical sources of sponsored programs
funding for our institution, by unit, school, and across the entire university? What funding
trends do we see over different time periods?
□ Awards by Award Type: What do the terms and conditions of award agreements look
like for award types like contracts and gifts? For each award type, what are the trends
and success rates?
□ Awards by Start or End Date: When do specific institutional responsibilities start and
end? If approval is needed for advance funding on a pending award, how can I determine
when the expected sponsor funding authorization will begin?









Benefits of KC - Compliance

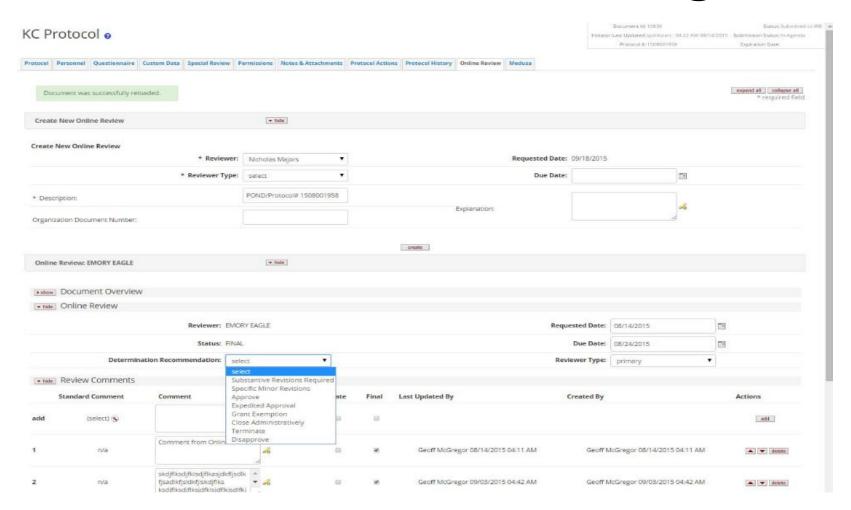
Committee Management

- Creation & Maintenance of Membership
- Route Protocols/member review via system
- Automated access to Protocols, approvals, minutes, etc
- Management of meetings, schedules, agendas
- Automation of approvals, notifications, renewals

Module/Protocol Management

- IRB, IACUC, COI (IBC & EC)
- Linked to proposals/awards in OSP modules
- Security follows OSP proposal level
- Linked to existing UMBC PI data
- Access at multiple levels
- Multiple users in one protocol
- Reduced PI and Staff time in:
 - Creation, Submission, Managing
- Customize for unique populations & research activities
- Paperless office

IRB Protocol Review Page





Estimated Costs to Implement

	S/W				
FY	License	Implement	Analyst	Students	Total
FY16	\$9K	\$25K	\$30K	0	\$64K
FY17	\$27K	\$125K	\$70K	\$25K	\$247K
FY18	\$27K	\$10K	\$75K	\$10K	\$122K
FY19	\$27K	0	\$75K	\$10K	\$112K

^{*} FY17 USM S/W License fee \$373,313 (TU, UMB, UMCP, & UMBC) - UMBC Share \$27K



Transition to Kuali-Coeus (KC) THANK YOU

Questions?

For more information go to: https://www.kuali.co/resources/

