

Post-Award Support Roadmap | May 2025

Prepared by: Post-Award Committee Project Manager: Jeanne Hossenlopp	BACKGROUND: Marquette's success in obtaining external funding for research, instruction, equipment, and other projects has created significant challenges for PIs and support staff who assist with grants management tasks. The strategy for addressing these challenges involves process improvement to: Reduce time required for key tasks, reduce error, increase staff capacity, improve communication, and create training and resource materials for all stakeholders who help manage grants.
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PRIORITIES, GOALS AND MILESTONES						
Priority	Projects	Status	Milestones			Additional Comments
Create user friendly platform for monitoring grant accounts (PI priority during NSF ADVANCE AMP discussions; staff requested earlier identification of any needed corrections to streamline processes for close of fiscal year and for grant closeout).	User-friendly, consolidated grant dashboard that includes information on all budget expenditures, including personnel.	IMPLEMENTED	AUGUST 2024 Public launch	SEPTEMBER 2024 Training sessions		Click here to view Grant Budget Dashboard information (Supporting in part by MU NSF ADVANCE award #1936148).
Improve set-up process from official notice of award (NOA) to ready-to-spend grant accounts , with transparent communication and tracking.	Redesign financial account set-up to streamline workflow: Create the account only after defining all parameters so when the account is created, it is ready to spend from the start. DocuSign is the workflow tool, can track progress.	PHASED ROLLOUT UNDERWAY	NOVEMBER 2024 All new account setups workflow through DocuSign. Team continues to improve with error proofing, extending the number of process steps captured within DocuSign workflow, and improving the user experience.			
	Use Kuali Dashboards to communicate progress with PI, Colleges, and others.	IN PROGRESS	MAY 2024 Validated feature functionality	DECEMBER 2024 Deployed with Material Transfer Agreements (MTA)	APRIL 2025 Expanded to participant agreements	Continue work with additional agreement types (e.g. speaker, consultant, subaward, etc.).
	Annual report of key time-to-completion metrics for account set-up.	FUTURE DEVELOPMENT				MU POST external evaluators currently leading metrics development workshop with selected stakeholders to develop set of metrics most useful for evaluation and future planning.
Provide additional central support for PIs.	Hire and train two grant advocates (one funded by MU POST).	IMPLEMENTED	MARCH 2024 Internally funded Advocate hired	OCTOBER 2024 MU POST Awarded	DECEMBER 2024 MU POST funded Advocate hired	Advocates working with selected PIs following criteria specified in grant applications (Click here to see Advocate Engagement Process). Training is on-going.
	Create and disseminate grant management tools.	IN PROGRESS	JANUARY 2025 Post award and responsibilities document	MARCH 2025 Grant award pre-kickoff checklist	APRIL 2025 Grant award checklist	Click here for documents posted on ORSP website. Next steps: MU POST website under development; Monthly checklist for PIs.
	Kuali data available in DataMarq.	IN PROGRESS	SEPTEMBER 2024 Initial data engineering testing completed		APRIL 2025 “Project development commitments” report published	Work will continue to deliver additional reports (e.g. awards, reporting deadlines, etc.).
Address limitations that grant budgets cannot cross fiscal years in the budget system (MBS). Year-end close requires (1) loading a temp budget to continue spending during the summer and (2) after fiscal close is finalized uploading the carry-over budget with funds reallocated to resolve any/all overdrawn naturals.	Streamline processes to reduce manual work and errors in annual grant budget rollover.	COMPLETE	MARCH 2024 Used BI report to automate reallocating overdrawn naturals in the carry-over budget (NOTE: identified tangential opportunities being addressed separately).			This is a "behind-the-scenes" process that strains staff capacity during peak grant spending periods, which often coincide with other major university priorities—creating compounded challenges for ongoing grant support.
Continue to utilize stakeholder feedback for future project prioritization and evaluation of completed project impact.	Stakeholder feedback survey.	IN PROGRESS				MU POST external evaluator designing initial survey for late spring/early summer 2025.
Improve processes to limit errors in grant-funded summer salary payment.	Streamline the salary authorization approval and transaction workflow with DocuSign to provide visibility and tracking.	IN PROGRESS	DECEMBER 2024 All colleges submit these forms with DocuSign		APRIL 2025 Student Affairs and Office of the Provost submit the forms with DocuSign (rather than email)	Salary authorization processes impact operations beyond grants so this workstream supports the post award improvement initiative but is not housed under it.

GLOSSARY	Kuali - Marquette University's electronic system for proposal approval and submission, research compliance and grants management.
	DataMarq - Used for reporting and analytics at MU. Offers a searchable, user-friendly catalog of reports available to the university community as well as reports available to the public.
	PI (Principal Investigator) - The individual responsible for an externally-funded project. PIs are accountable for the project's technical success, financial management, and compliance with applicable regulations.
	SA (Salary Authorization) - Formal approval process required before an employee's salary can be entered into the university's payroll system. This process ensures that funding sources are appropriate, employment terms are valid, and the salary is within the approved budget. It's a crucial step for both student and faculty/staff hires.
	* Anything underlined blue is an external link

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