

MU POST Baseline Survey Results

July 2025



MARQUETTE
UNIVERSITY

BE THE DIFFERENCE.

MU POST Stakeholder Survey

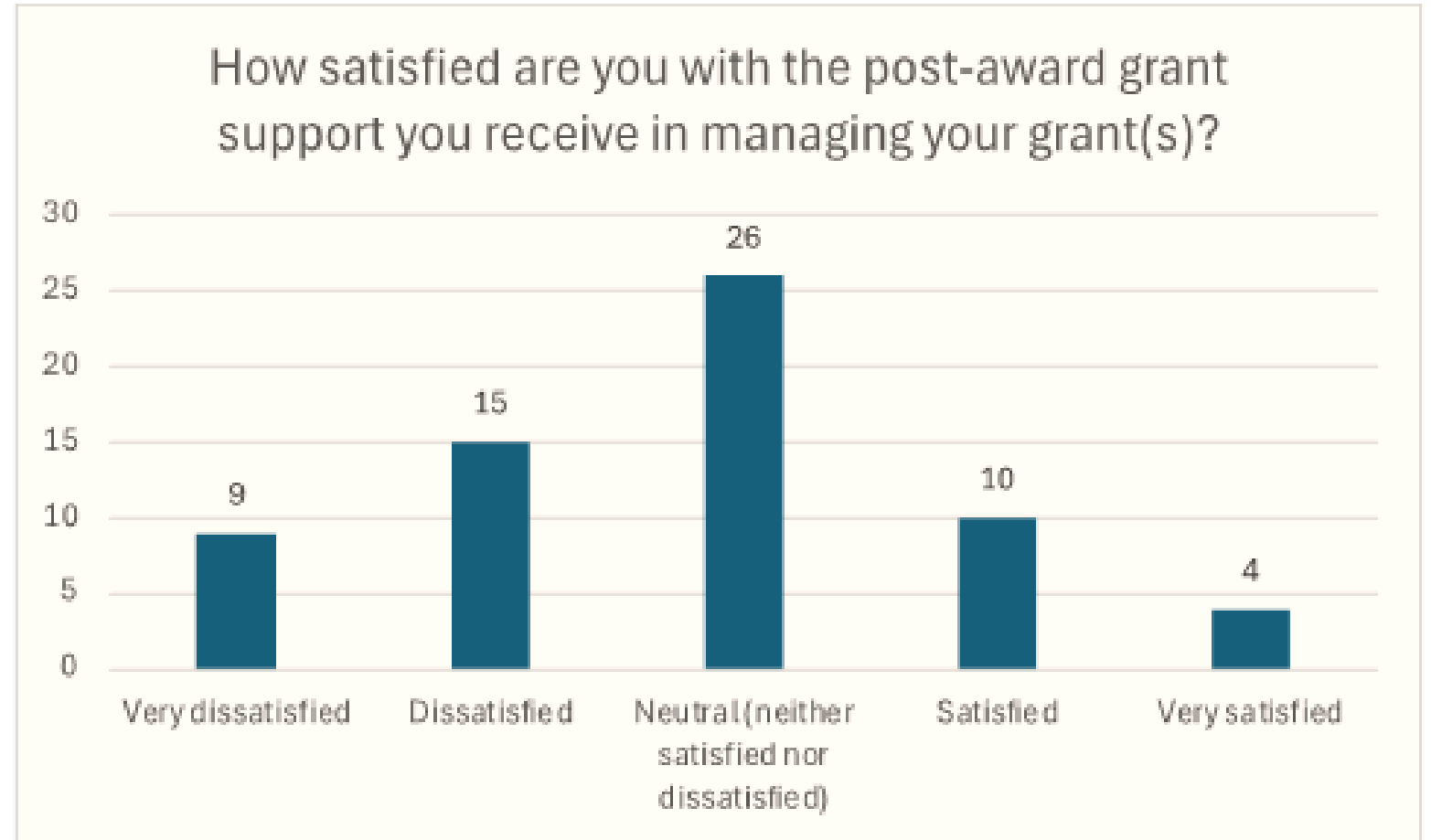
Respondents:

78 PIs,

15 business
operations/department
staff,

9 university central office
staff,

7 academic leadership
(dept chairs, associate
deans for research)



External Evaluator Findings: Summary of Key Challenges

Role Clarity

Documentation
and
Transparency

Communication
and Hand-offs

Forms and
Report Use

Faculty-Staff
Interface

Capacity and
Resourcing

Stress and
Empowerment

Another View of Survey Comments

Specific Issues

External Evaluator Themes

Delays in
Award/Account Set-up

- Communication and Hand-offs
- Capacity and Resourcing

Accuracy and User
Understanding of New
Dashboard

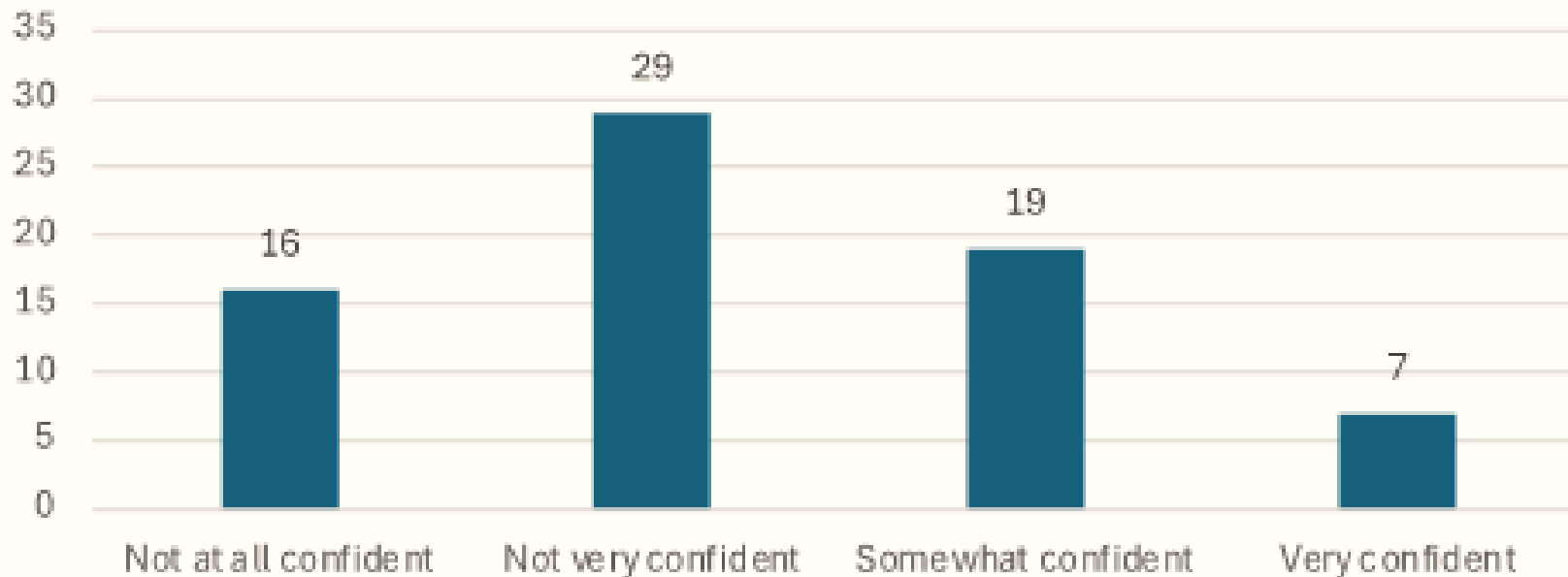
- Forms and Report Use
- Documentation and Transparency

Lack of Communication
and Responsiveness

- Communication and Hand-offs
- Role Clarity
- Capacity and Resourcing

Why Focus on Reports and Forms?

How confident are you in taking the necessary actions to complete tasks (e.g., initiate a budget transfer, request a reallocation, flag an issue) you found in a report or on BI dashboard?



Target outcomes:

PIs manage awards more effectively and maintain compliance.

Staff capacity for other critical tasks improved by:

- Reduced inquiries (reports are useful to users)
- Quicker identification and resolution of potential issues
- Minimized rework/error correction

Reports: Comments on the New Dashboard

“**Absolutely useless** and isn't up to date”

“The Grant Budget Dashboard introduced recently is **fantastic**”

“Concerns with the accuracy of information”

“The grants dashboard is the best tool. That is basically all that I use now.”

“Having to decipher between internal ORSP budget spreadsheets/PI initial budgets and where/what naturals the budget actually ends up in BI reports”

“The new grants dashboard is nice, but I think websites cannot replace human to human interaction”

“How much money is left right now?”

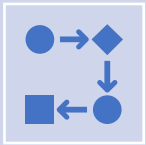
Responding to Dashboard Concerns

Grant advocate and ORSP have identified a few examples of the issues that PIs are encountering and are working with ITS and Finance to evaluate:

- Where are there are gaps in user understanding of the information being presented?
- Where may the reports be providing incorrect data and, if so, how can this be fixed?
- And is there a simple way to report total available budget?

Plan to add in-person training sessions to assist users in FY26.

Help with Forms (Capacity Building Focus)



Reduce frequent errors and re-work in form submission



Improve visibility into form workflow and status



Provide clear guidance and training

Forms Next Steps

Use Lean methodology to improve processes:

Rebudget funds within a grant account

Move expenses between accounts

Authorize tuition credits be paid from a grant

MU POST year 2 (FY26)

GRANT BUDGET TRANSFER REQUEST
Office of Research and Sponsored Programs/Holtzman
Hall 341
Phone: 288-7200 Fax: 288-1578
http://www.marquette.edu/orsp/

Instructions: Use this form to rebudget funds within a grant account.
Submit the completed form with attachments to postaward@marquette.edu
(resp. center) / (restriction)

Account # _____

#	EFFECTIVE DATE OF TRANSFER	FROM NATURAL	TO NATURAL	AMOUNT
1				
2				
3				
4				
5				

REQUIRED: Below, please provide justification to support the budget transfer. Please be aware that often sponsors require prior written approval to process budget transfers. ORSP will assist in understanding your sponsor's guidelines to determine if a proposed change requires prior written permission from your sponsor. Transfer requests without proper support will be returned unprocessed.

1) Please describe why you need to make the budget transfer defined above.

2) Was prior permission need for _____
If yes, a copy of it _____
I certify that budget transfer request is awarded. The proposed charges _____

PI/Authorized Signer _____
APPROVAL: _____
ORSP _____

GRANT EXPENDITURE TRANSFER FORM
Office of Research and Sponsored Programs
Holtzman Hall 341
http://www.marquette.edu/orsp/

Revised 12/1/2019

INSTRUCTIONS: Use this form to transfer expenditures between two accounts, when one account is a grant. Please note that salary cannot be transferred using this form.
Attach documentation to support the transfer (a copy of the detailed expense report highlighting the expense to be transferred and/or copies of the receipt(s) describing the expense being transferred).

Submit the completed form with attachments to postaward@marquette.edu

FROM Account #	TO Account #

NATURAL	PAYEE / VENDOR	INVOICE#	CHECK #	DATE PAID	AMOUNT

REQUIRED: Below, please provide justification to support the transfer (see examples on page 2 of this form). Describe what is being transferred and how it relates to the project/account receiving the charge. Also explain why it is necessary to transfer the charge from the original account and/or natural. Transfer requests without proper support will be returned unprocessed.

STUDENT GRANT SUPPORT FORM
Office of Research and Sponsored Programs
Holtzman Hall 341
http://www.marquette.edu/orsp/

Revised 9/23/2019

INSTRUCTIONS: Complete this form to request tuition credits to be paid to a student from a grant. Email the completed form to postaward@marquette.edu.

SECTION 1: STUDENT INFORMATION
Student's Last Name _____ First Name _____ Middle Initial _____
MUID _____
Student Status: (Graduate) (Undergraduate) (Law School) (Dental School)

SECTION 2: PRINCIPAL INVESTIGATOR INFORMATION
PI's Last Name _____ First Name _____ Middle Initial _____
Grant Sponsor _____ Grant Start and End Dates _____

Enter the year for each session and complete the account number and number of credits.

Charge to:	FALL		SPRING		SUMMER	
	Account #	Credits or \$	Account #	Credits or \$	Account #	Credits or \$
Grant						
Cost Share						
ORSP						

Principal Investigator's Signature _____ Date _____
(or Authorized Signer)

Form Completed By _____ Phone Ext. _____ Date _____
(if different than signer)

SUBMIT COMPLETED FORM TO postaward@marquette.edu

ORSP Use Only:	
Item Type:	
Award Entered On:	By: _____
Posted to Student Account:	
Comments:	

***This form is designed to allow PIs and Authorized Signers to request multiple semesters of credits during the current academic year only. In the event credits have been applied to a student's account and they do not work on your project, the PI must contact ORSP to have those credits reversed.

Communication and Responsiveness

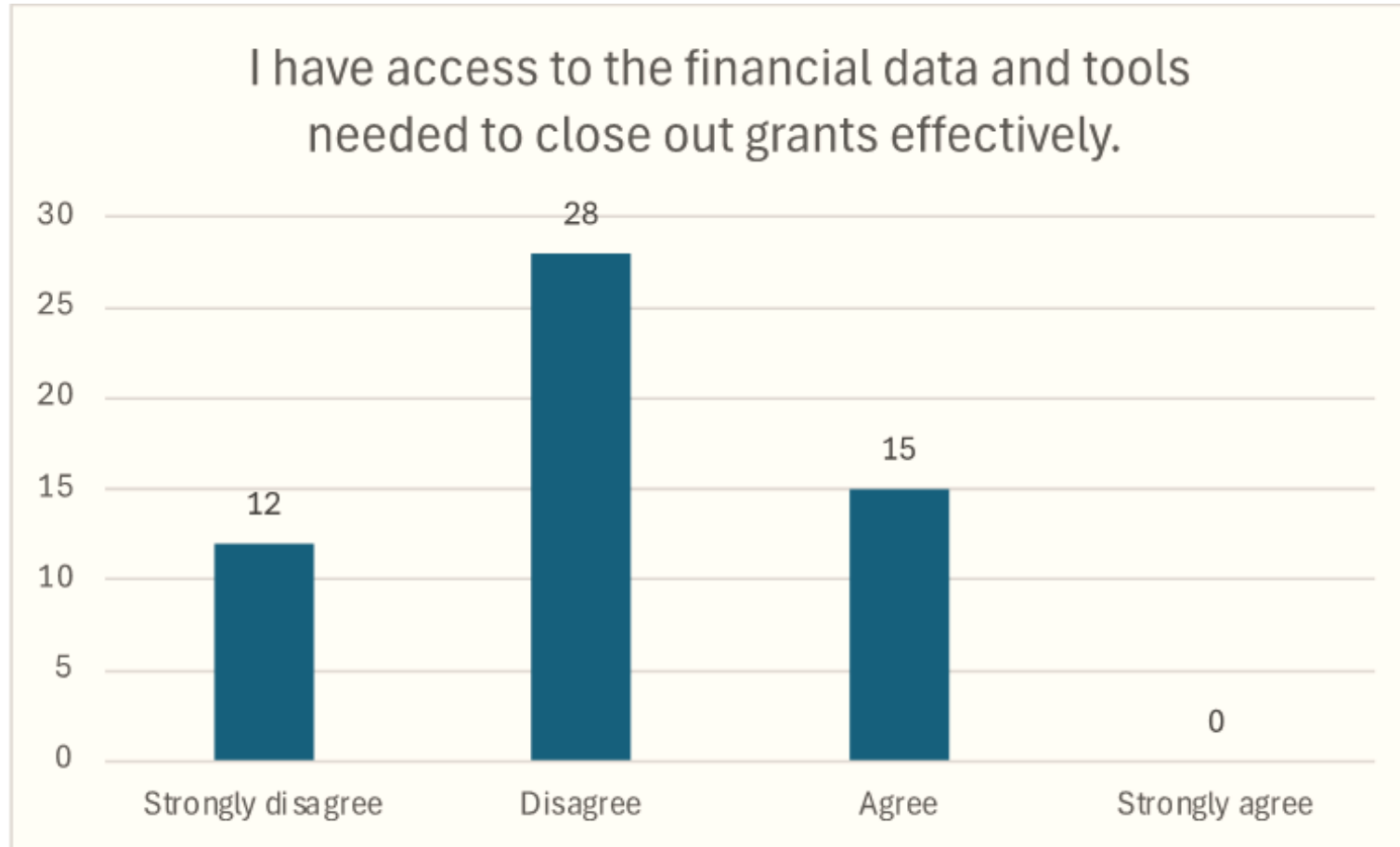
Short-term:

- Building tools/resources to help people find answers or direct questions to the right person
- Pilot more in-person training (use of the dashboard, monthly sessions to help new awards get launched combined with office hours)

Longer-term:

- Evaluate help-desk approach or other means of helping track inquiry responses (avoid things getting lost in email)

FY26 MU POST priority: account close-out



New checklist
in progress
with:

- Timeline
- Specific tasks
- Who is responsible

Engaging the Campus in our Efforts

- Campus Town Hall (suggest once per semester)
- Office hours and other training activities – will gather “pulse survey” data to evaluate usefulness
- Updating the online roadmap – September, December, and June
- Online resources available as they are developed – how can we best point people to them?
- Other suggestions?

Thanks!

- Survey respondents
- Colleagues who are helping with process improvement projects
- Post award grants management improvement oversight committee
- MU POST team and NSF GRANTED program (NSF award #2426787)