

Research Administration
Community Forum
Poster Session

June 14, 2017

1

Material Transfer Agreements in Phoebe

Rob Lamb, Associate Director and Public Policy, Technology Contracts Office

BACKGROUND	MTAs in Process	Why Process?
<p>The Technology Contracts Office (TCO) manages and issues all University of Florida (UF) Material Transfer Agreements (MTAs). MTAs are legal documents that govern the use, ownership, and distribution of intellectual property (IP) created by researchers at UF. They are essential for protecting the University's interests in research results and for ensuring that researchers can share their work with other researchers and industry partners.</p>	<p>1. Researchers complete the Phoebe MTAs process, including the Phoebe MTAs Request Form and the Phoebe MTA Request Form.</p> <p>2. Researchers complete the Phoebe MTAs process, including the Phoebe MTAs Request Form and the Phoebe MTA Request Form.</p> <p>3. Researchers complete the Phoebe MTAs process, including the Phoebe MTAs Request Form and the Phoebe MTA Request Form.</p> <p>4. Researchers complete the Phoebe MTAs process, including the Phoebe MTAs Request Form and the Phoebe MTA Request Form.</p>	<p>Why is Phoebe so important? Phoebe is the University's central repository for all MTAs. It provides a secure and efficient way to manage the University's MTAs and ensures that all MTAs are properly documented and tracked.</p>
PROCESS IMPROVEMENT	What's Changing?	TIMELINE FOR IMPLEMENTATION
<p>Phoebe will be used to manage all MTAs. This includes all MTAs that are currently in process and all MTAs that are submitted to Phoebe in the future.</p>	<p>1. The Phoebe MTAs process will be implemented in the fall of 2017.</p> <p>2. The Phoebe MTAs process will be implemented in the fall of 2017.</p> <p>3. The Phoebe MTAs process will be implemented in the fall of 2017.</p>	<p>Phoebe will be implemented in the fall of 2017. This includes all MTAs that are currently in process and all MTAs that are submitted to Phoebe in the future.</p>





Transfer Agreements in Phoebe

Director and Anissa Jones, Industry Contracts Officer

BACKGROUND

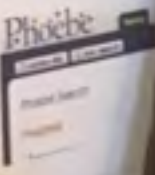
Agencies and labs in the University of Maryland System (UMD) are transferring research materials, data, and research materials and equipment to Phoebe. Data can include data from personally identifiable information about patients, and more. Software research, coding, and design kit.

S IMPROVEMENT

Submitted to UMD via an emailed PDF form. To Phoebe, and the process will be very similar to proposal MTAs.

Currently, Lab Managers, PIs, Graduate Students, and Postdocs are the primary requestors of new MTAs. They complete the MTA request form and submit it, along with the MTA contract, to UMD via [Phoebe Request Form](#). UMD completes compliance checks, reviews for funding obligations with the funding agreement, and reviews the MTA for compliance with UMD policy after negotiating and signing the MTA, the fully executed agreement is uploaded into Phoebe Search.

Steps for creating a MTA: 1. They will enter information and create an MTA request. 2. The requestors are responsible for all lab, including materials lab, and other. 3. These Phoebe requests are approved by the PI and sent to UMD.



MTAS IN PROGRESS

PI, Graduate Student, Lab Manager, or Postdoc ("Researcher") Requests Materials from UMD. Researcher contacts CS&BA to initiate the Phoebe MTA process. Provides adequate information, and CS&BA provides support. PI Researcher or "Aggregator" completes the MTA request form and submits it to UMD via Phoebe Request Form.

Researcher completes the Phoebe Material Transfer Agreement (MTA) and the request is submitted to UMD via Phoebe Request Form.

UMD receives the MTA request form and submits it to UMD via Phoebe Request Form.

ROCKET LIFE ON WHEELS

Before... After... The Rocket Life on Wheels project is a community-based participatory research project that aims to improve the lives of people with disabilities. The project is led by a team of researchers and community members. The project is currently in the planning phase and will be implemented in the next few months.

2

3



SECRET LIFE OF P.E.T.S

New and Improved Payroll Expense Transfer (PET) Form for Expense Transfers - Developed in Collaboration

BEFORE



- Where is the form?
- Which is the right version?
- What PPS data do I need?
- How do I filter the data?
- What are the deadlines?
- How do I calculate percentages?
- What backup docs do I need?
- How do I use it???

IDEAS

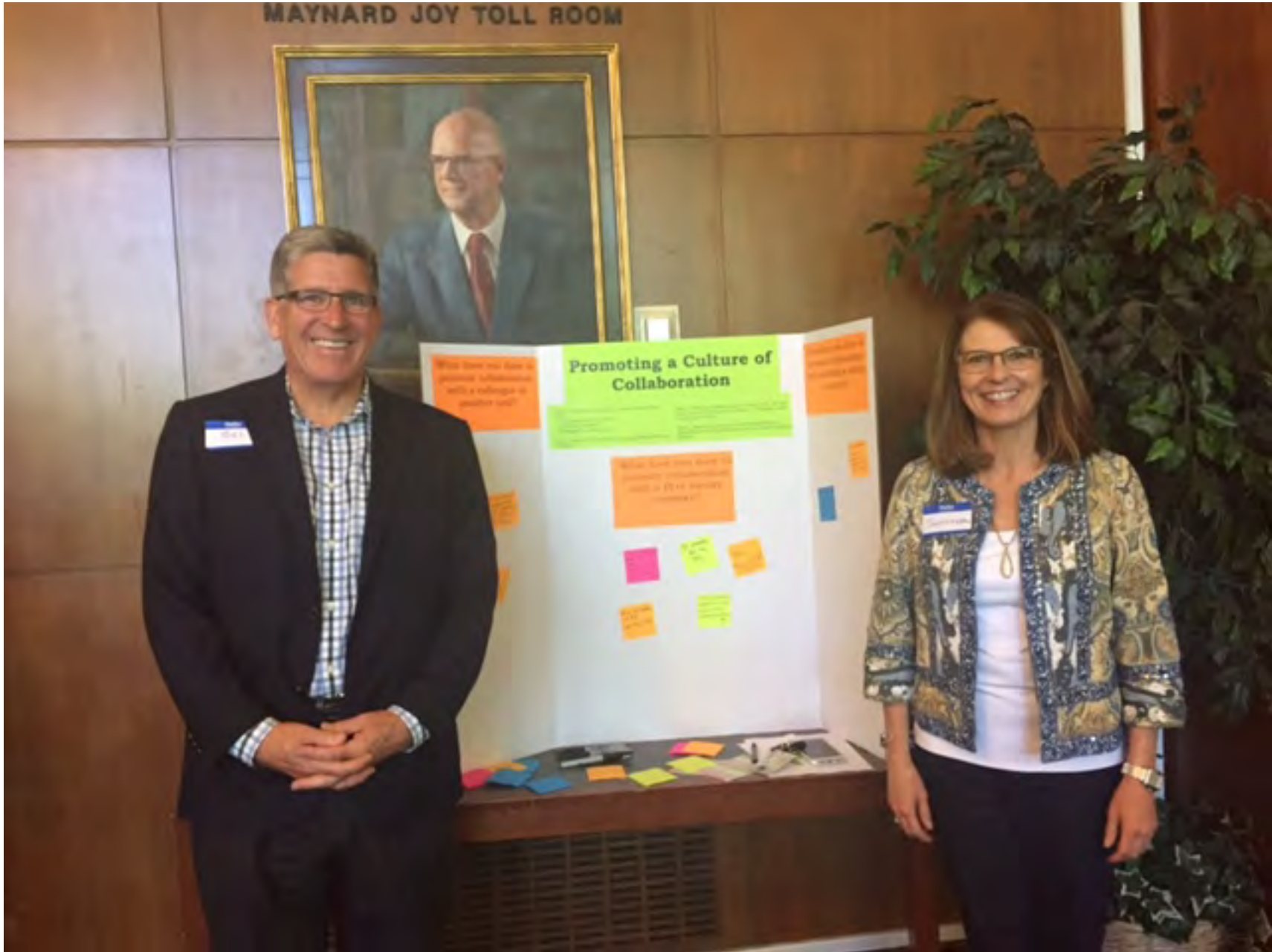


SOLUTIONS

- Step-1
- Univ
- No
- P









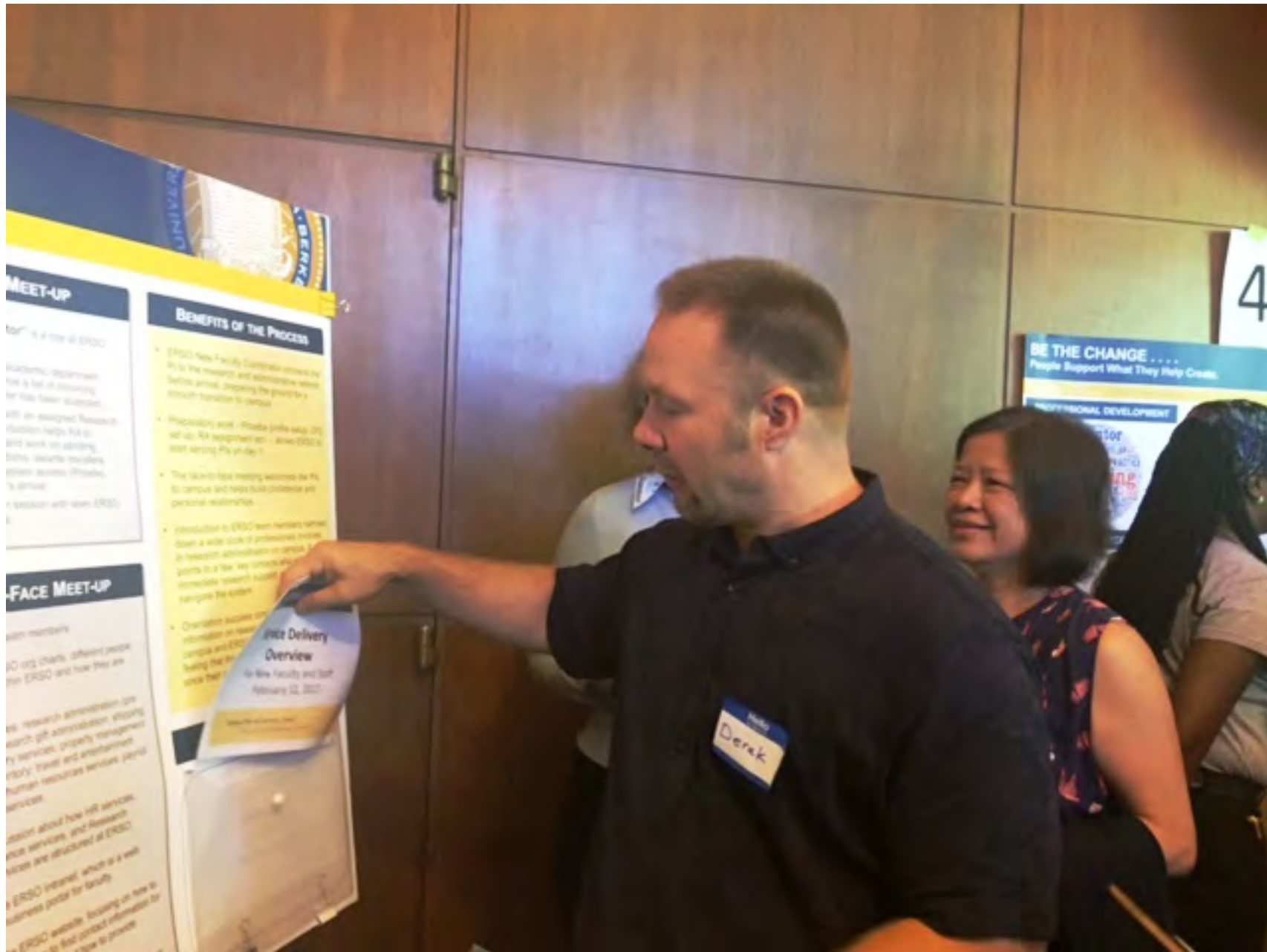












MEET-UP

ERSC is a role of ERSC
academic department
for a lot of planning
or has been assigned
all an assigned Research
council helps PA to
and work on advising
staff, awards members
green spaces, provide
to assist
a session with ERSC

FACE MEET-UP

ERSC members
ERSC org charts, different people
with ERSC and how they are
ERSC research administration (pro
search, gift administration, shipping
services, property management
policy, travel and entertainment
human resources services, payroll
services
ERSC information about how HR services,
procurement services, and Research
services are structured at ERSC
ERSC Intranet, which is a web
ERSC website, focusing on how to
ERSC website find contact information for
ERSC to provide

BENEFITS OF THE PROCESS

- ERSC New Faculty Considerations
to the research and administrative roles
before arrival, preparing the ground for a
smooth transition to campus
- Preparatory work - Provide profiles and CVs
well up. RA assignment and - allow ERSC to
start serving PA on day 1
- The face-to-face meeting welcomes the PA
to campus and helps build confidence and
personal relationships
- Introduction to ERSC team members
down a wide circle of professional contacts
in research administration on campus
points to a few key contacts who can
immediate research support
navigate the system
- Orientation supplies
information on research
campus and ERSC
helping the PA
since their

ERSC New Faculty
Orientation
Overview
to New Faculty and Staff
February 12, 2017

Derek

4

BE THE CHANGE . . .
People Support What They Help Create.

PROFESSIONAL DEVELOPMENT
ERSC
ERSC







Best Poster Winner!

ERSO Faculty Orientation
Process:

Damon Hinson (speaker), Yulia
Golubovskaya, Elise Mills, and
Derek Johnson

ERSO FACULTY ORIENTATION PROCESS

D. Hinson, D. Johnson, Y. Golubovskaya, E. Mills – Team 2 ERSO – University of California, Berkeley

ERSO STARTS WORKING WITH PI BEFORE ARRIVAL ON CAMPUS



MEET TEAM ERSO



www.erso.berkeley.edu

VIRTUAL MEET-UP

“New Faculty Coordinator” is a role at ERSO.

Person in that role:

- 1 Coordinates with each academic department served by ERSO to receive a list of incoming faculty as soon as an offer has been accepted;
- 2 Connects new faculty with an assigned Research Administrator. This introduction helps RA to understand PI's needs and work on pending proposals, new applications, awards transfers, electronic set up and system access (Phoebe, Intranet) before faculty's arrival;
- 3 Schedules Orientation session with team ERSO when faculty relocates.

FACE-TO-FACE MEET-UP

Introduction of ERSO team members.

Explanation of the ERSO org charts, different people and service groups within ERSO and how they are connected.

Explanation of services; research administration (pre and post award); research gift administration; shipping, receiving and delivery services; property management and equipment inventory; travel and entertainment payment requests; human resources services; payroll services; financial services.

More specific discussion about how HR services, Business and Finance services, and Research Administration services are structured at ERSO.

Explanation of the ERSO Intranet, which is a web based one stop business portal for faculty.

Explanation of the ERSO website, focusing on how to access the Intranet, how to find contact information for the various service groups, and how to provide feedback.

Time for questions from PIs and scheduling follow-up meetings.

BENEFITS OF THE PROCESS

- ERSO New Faculty Coordinator connects the PI to the research and administrative network before arrival, preparing the ground for a smooth transition to campus.
- Preparatory work - Phoebe profile setup, CF2 set up, RA assignment etc. – allows ERSO to start serving PIs on day 1.
- The face-to-face meeting welcomes the PIs to campus and helps build confidence and personal relationships.
- Introduction to ERSO team members narrows down a wide circle of professionals involved in research administration on campus. It points to a few key contacts who will provide immediate research support and will help PIs navigate the system.
- Orientation supplies concise and accurate information on research administration on campus and ERSO's role in it. PIs walk away feeling that they can focus on their research since their administration is in good hands!

TAKE A LOOK !

Phoebe
when you have
finished looking