# Project Summary:

The project aimed to review and enhance the efficiency of the interface between the School of Education and RE&O in relation to the research grant fund application and award process.

## Project Team Members:

Susan Steggles

## Background

(How was the project identified)

The project was identified through discussion with the School’s Research Director and Resources Manager who identified the need to review and map out the process surrounding submitting research grant applications with a view to seeking enhancements to the clarity and efficiency of the process.

## Objectives

(What were the intended outcomes for the project)

- Creation of a guide and/or map of the process which could support staff in the School at all stages of the grant application process
- Clarify and agree respective roles and responsibilities of School staff and the RE&O support team at all stages of the bidding process to avoid duplication of effort and maximise support available.
- Clarify the approval process in the event that any research grant bids do not conform to the full economic costing model.
- Identify whether a fast-track process could be implemented to allow for rapid response in the event of potential bids with tight deadlines.

## Approach Taken

(Including tools applied)

A **Project Initiation Document (PID)** was prepared in consultation with the project sponsor (School’s Research Director) and project owner (School’s Resources Manager).

A workshop was organised in order to undertake a **current state mapping** exercise in collaboration with key staff from RE&O including the School’s Business Partner and the Research Finance Officer as well as the aforementioned School stakeholders.

The workshop also considered the **Root Cause Analysis** of the issues surrounding the process.

Initial discussion of potential **future states** was included in the workshop however the **mapping of the future state** was completed by email forum and agreed by all stakeholders.

## Summary of Impacts and Improvements

The process resulted in production of a map which formed the basis of new guidance to be implemented at School level by the Research Director in
association with academic colleagues. The process encouraged staff to consider finance and due diligence considerations far earlier in the scoping process.

It was also agreed that there was a risk associated with the preparation of non-staff costs for bids as this task fell to the Resources Manager with no back-up should she be unavailable at any time to support a bid. It was agreed that the Resources Manager would produce a checklist for staff to assist in preparing the non-staff costs associated with research bids.

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<thead>
<tr>
<th>Lessons Learned (what advice would you give to others)</th>
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<td>If possible, ensure that initial LEAN projects are relatively small in scale without too many disparate strands thereby allowing the opportunity to practice techniques and approaches in a more controlled environment.</td>
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<td>Get buy-in from all key stakeholders at an early stage to mitigate the risk of anyone feeling threatened by a change to “their” process.</td>
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