

Increasing RD Office Efficiency By Utilizing Existing Tech Tools: A Description of 3 Pilots



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ABSTRACT

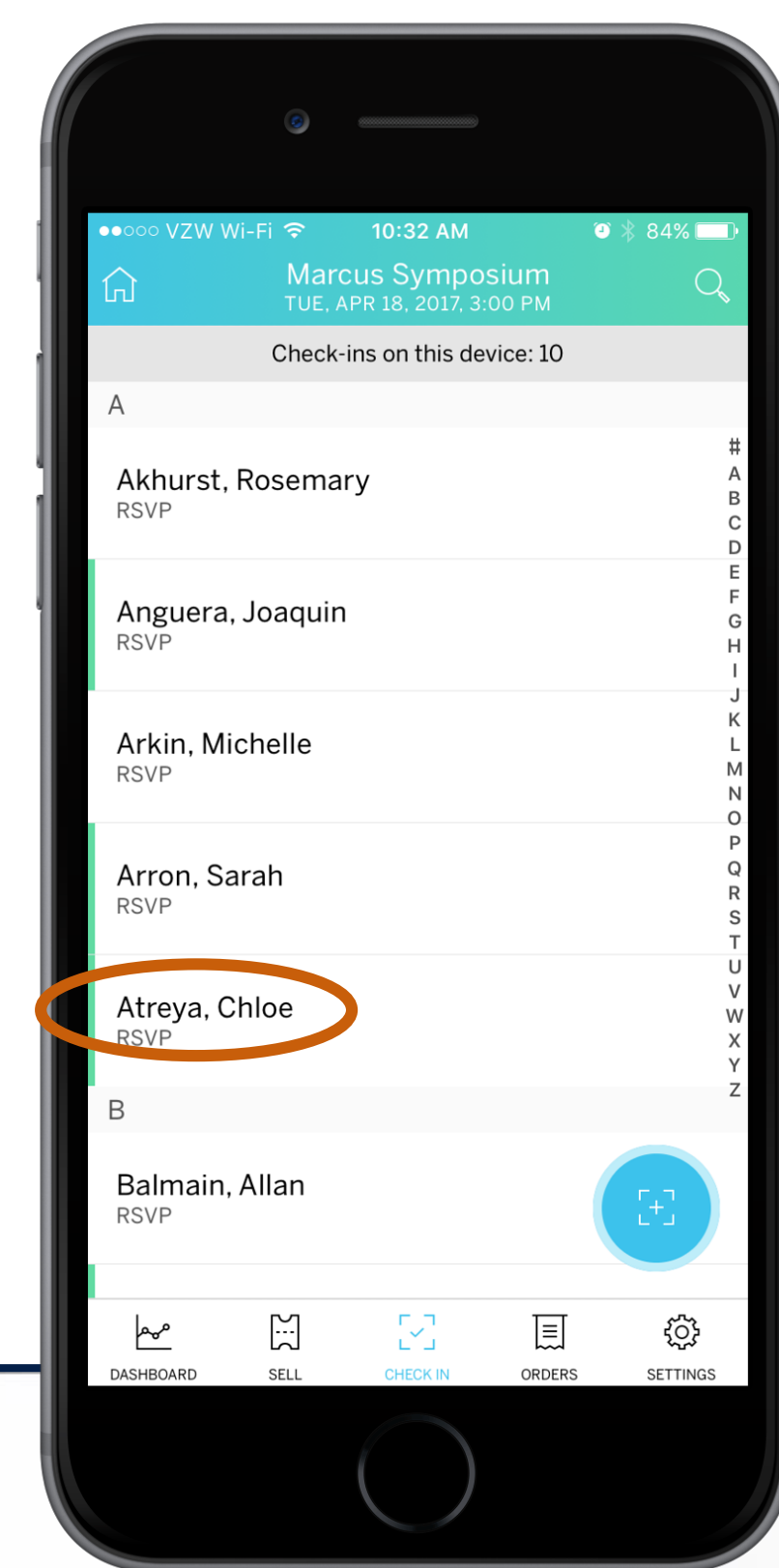
This poster discusses three ways in which the UCSF Research Development Office (RDO) increased efficiency by utilizing easy to use tech tools. Each example demonstrates a distinct tool or tools put to use in a unique RDO activity. The tools described were chosen because they are easy to learn, available at no cost to our office, and perform well to automate or capture an RDO activity. By implementing use of several tech tools, we found that: 1) streamlining team science event invitations and communications via integration of Eventbrite and MailChimp increases quality of communications and data capture while decreasing person hours required for those tasks; 2) automation of survey distribution and seed-funding post-award reports using Qualtrics increases survey reach and report uniformity while decreasing effort; 3) Kanban-style task management via a cloud-based platform called Trello enables seamless sharing of tasks across multiple individuals collaborating to run a Limited Submission Program. These examples can serve as a model for other RD offices that wish to increase efficiency, program reach, and team work. By choosing open source and university-contracted tools that are simple to use and make our jobs easier, we increase the chances of buy-in from colleagues and collaborators, making successful long-term implementation and use more likely.

PILOT 1: Streamlining Team Science Program Communications & Data Capture

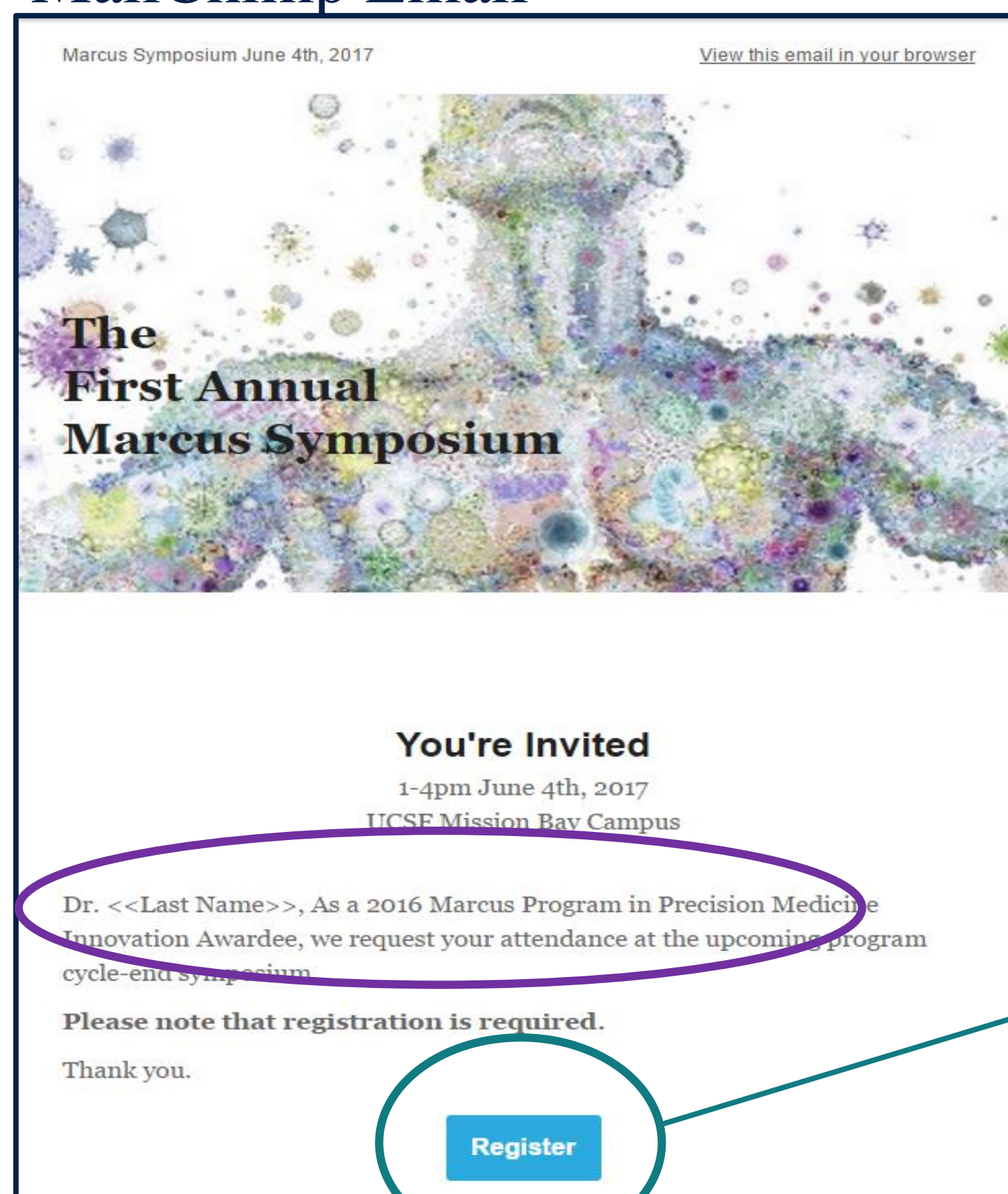
We implemented a system of utilizing the free online platforms Eventbrite and MailChimp to create team science event webpages and individualized invitations to faculty members.

Specific app features enable high quality communication and reduce person hours required to produce successful events.

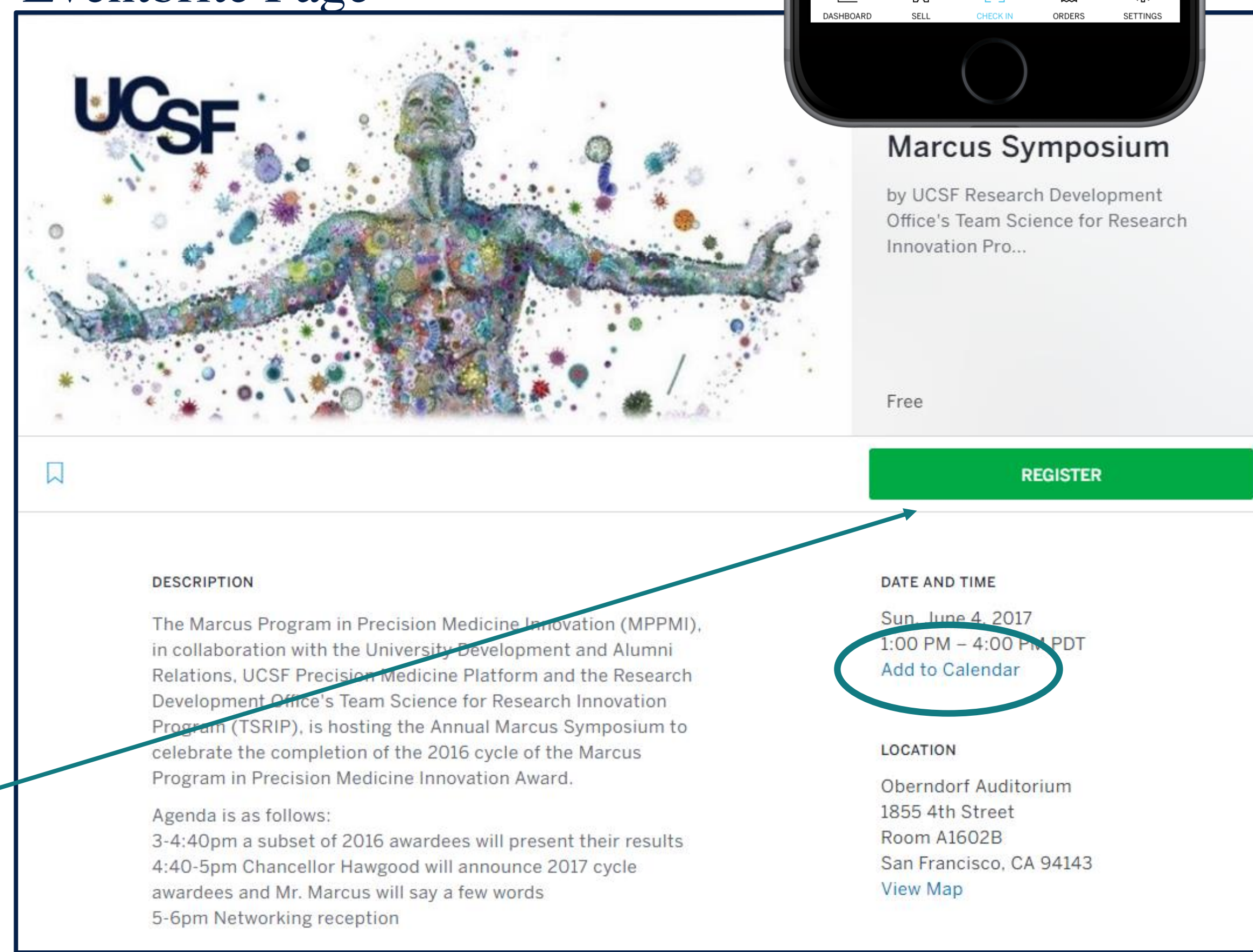
- MailChimp field codes and segmentation allow us to automate personalized emails to each of hundreds of faculty invitees with very little time or effort.
- Utilizing these apps in tandem creates professional looking communications that make it easy for invitees to find necessary information, register, and add events to their calendars.
- Digital check-in is fast, looks professional, and eliminates time consuming and error-prone manual data entry.



MailChimp Email



Eventbrite Page



Integrating these apps enables enhanced data capture.

- Apps capture who was invited, who registered, and who attended each event without manual data entry, eliminating transcription errors.
- This generates more and better program data with less time and effort.
- Great data capture builds our pool of potential invitees improving our ability to curate specific invitee lists for our events.

Event Participation Data by Year

Event Year	Count of Events	Count of Invited	Count of RSVPd	Count of Attended
2013	1			17
2014	2			34
2015	4	No Data		175
2016	6	456	240	249
2017	5	252	233	126

Implementation

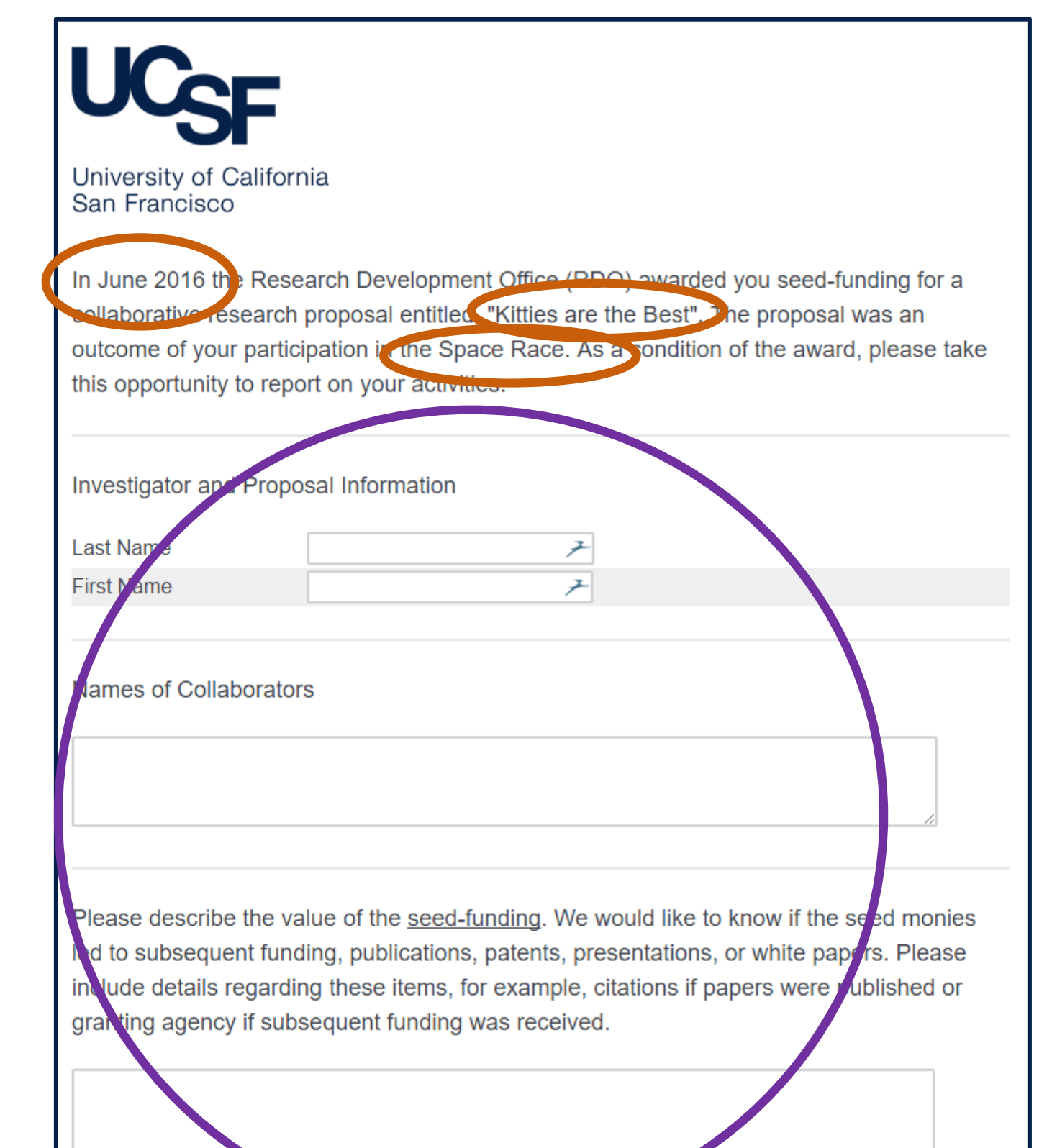
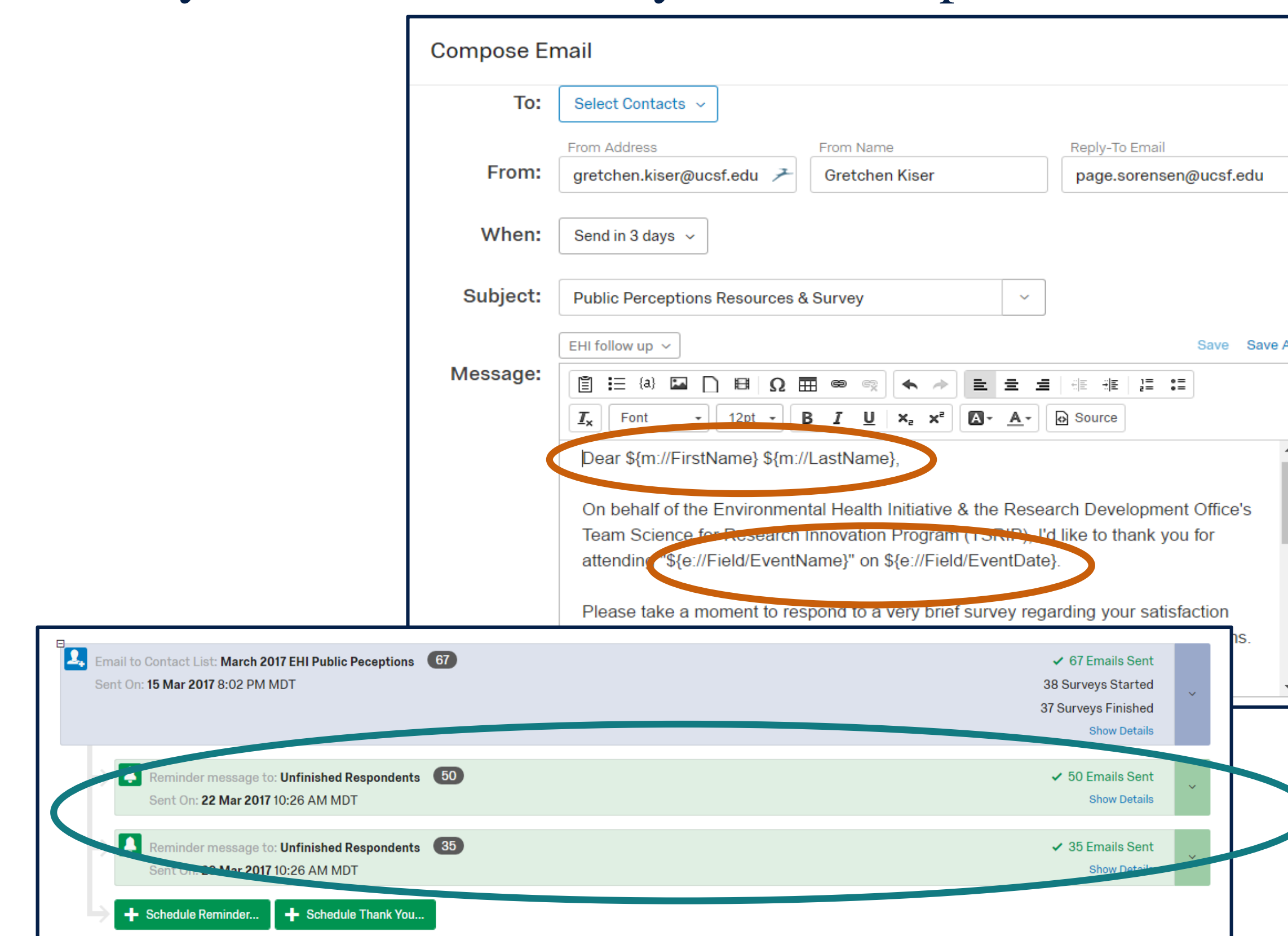
PILOT 2: Automating Surveys and Seed-Funding Post Award Reports

We automated survey distribution and seed-funding post-award report requests using the online survey platform, Qualtrics.

Outcomes:

- We can create and schedule individualized emails with field codes corresponding to imported recipient-specific characteristics.
- Reduced communication burden on RDO staff while improving professionalism and recipient experience.
- Streamlined post-award report form that is very low burden for faculty and results in a high response rate.

**This system was enabled by the data capture from Pilot 1.



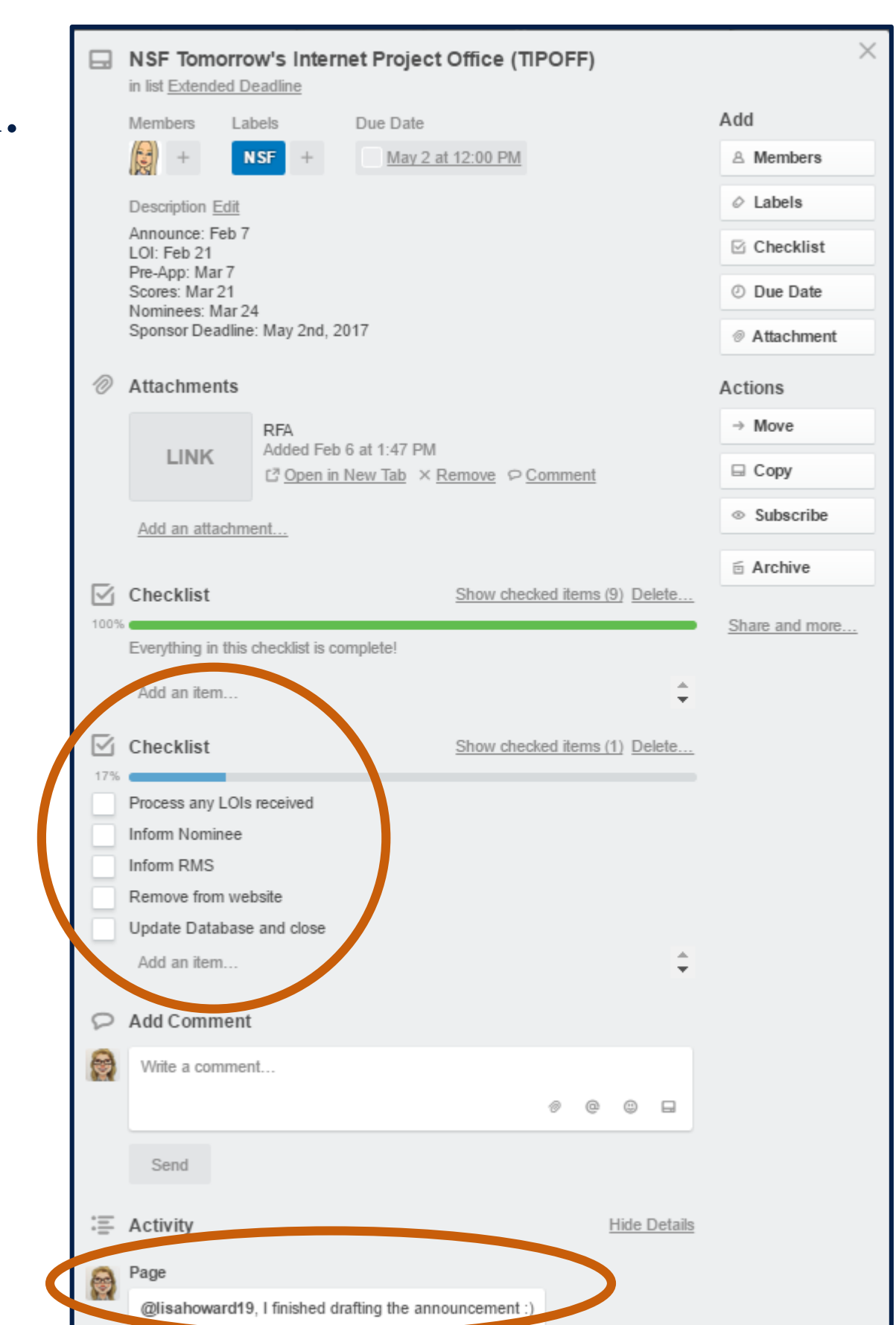
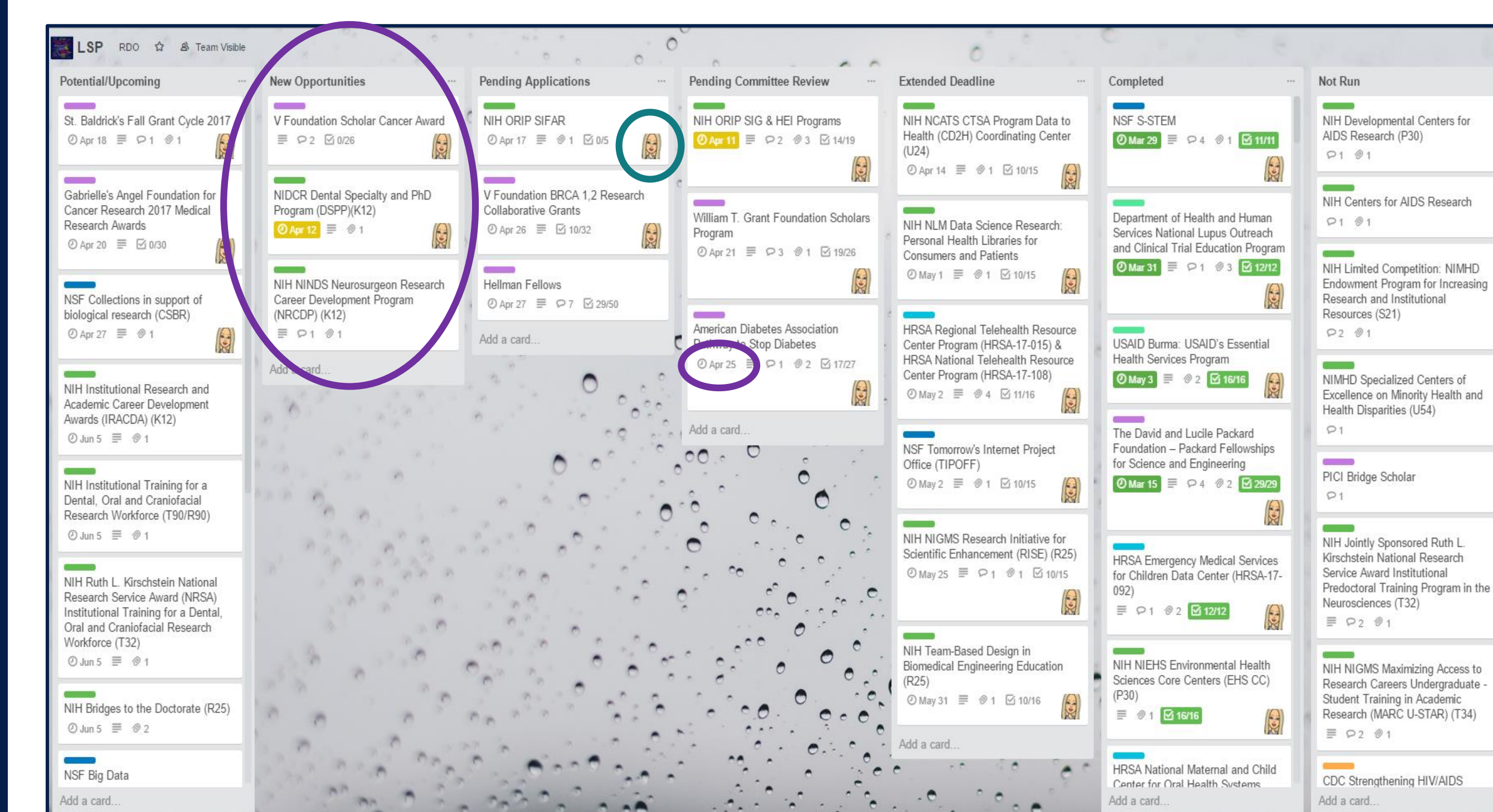
PILOT 3: Enabling Task Sharing Across Multiple Individuals

We implemented a Kanban-style task management system via a cloud-based platform called Trello to ease communication burden across multiple individuals collaborating to run a Limited Submission Program.

Outcomes:

- List and card format makes it easy to visualize and track many competitions at once.
- Assignment functionality enables seamless sharing of tasks across individuals.
- Checklists and comment functionality keep team members up to date without adding to email burden.

★ Simple to use and fun makes it easy to get collaborator buy-in.



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App Web Addresses: mailchimp.com, eventbrite.com, qualtrics.com, trello.com