Request for the resadm-l@lists.healthresearch.org

Submitted March 2022

Original Question:
How do you track your grants/awards/projects? Contacts, emails, all the extra important details?

Hello Everyone,

I could use some help here. I have a question about *tracking all the extra details* related to grants/awards/projects.

Outside of the computer system that your employer provides, to enter and maintain grant information, how do you keep track of all the details/correspondence/change in emails and contacts, etc. of your grants?

Do you have a separate excel spreadsheet for all the details? Do you download reports from your system and add notes? Do you write it all down in a notebook? Do you search your email and find the answer?

How do you organize and track all the extra details!?

I am trying to come up with a way to be able to show all activity (emails/phone calls/etc./change in contact information- which is very common these days) for anyone (in my dept) who works on the grant, in one place. So if someone is out or someone has a question, they can look/have access to one place vs. emailing everyone or waiting until someone returns for a response.

We just received approval to use Smartsheet's, so this may help. We have used One Note in the past. The other issue is that some people need to have a print out or a screen shot. They do not necessarily want to go into these other systems and look up this information.

I would just love to know how you all keep this information organized and shareable with your colleagues and your organizations?

If you don't feel comfortable replying to the entire group, please email me directly at jill.hamilton@rx.umaryland.edu

Many Thanks for your help!
Jill Hamilton

Office 365

Hi Jill,

We use Office 365 here at UCF, and the Notebook feature may work well for this. You could setup a notebook for each project/award/grant and then you can send information from emails to that specific notebook from the email itself. So if you received a change in POC for a project, just send that email to the notebook and it will document it.

It is really handy! Our biggest hurdle with it is remembering to actually use it! We get so busy with everything, it is just another step we have to get use to doing.

Thanks!
Elise

Elise Dantuma, MBA, CRA

MANAGER
CONTRACTS & GRANTS

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Please note: Florida has a very broad open records law (F. S. 119). E-mails may be subject to public disclosure

Proposal Traveler (Example attached to this email)

We use a word document called a proposal traveler. It lives in the folder where all the proposal documentation is on a shared drive so that someone can come in and take over a submission if needed or for background at time of award negotiations if the person working on that was not involved in the original project.

Susan Cao – Oregon State University

(Proposal Traveler attached to this email)

Proposal Traveler
Template with hire da

Microsoft Power Apps and Salesforce

Good morning,

The challenge with what's been proposed so far is that it's pretty much manual, adds duties to already overburdened staff and relies on remember to do it. We mapped out our business processes a couple of years ago to see what we could automate, track, identify bottlenecks, etc. We found two products that could work to do much of what we wanted to do…Microsoft Power Apps and SalesForce. There are other CRM software products that would likely work, too.

In the end, it was lack of funds that kept us from doing anything. Either program requires developers to write the queries, rules etc. Once that's done, then someone has to be dedicated at least in part to maintain and update said rules/queries. We don't have people to do that. But, we're back at the table looking again at what kind of resources we need and what it would save us in time and provide in reporting metrics.

Maryellen
Maryellen O'Brien
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_____

One Note

I use OneNote. I have a section for grants and awards, a tab for each PI, then a page for the grant. You can have a number of pages, or tabs depending on how much granularity you need.

I mostly use it to organize my pre-award stuff.

Francesca Werenko, University of Vermont

Salesforce

Hi Jill,

Because I sit in the Office of Special Projects which finds Salesforce very useful, that is what I use. I have been able to set up grants with whatever fields I need to track. I have looked into other grant-specific tracking software, eg, Smartsheets, but at the moment, Salesforce is doing everything I need.

To answer your question, there is a great feature that tracks emails through a Gmail extension that keeps a Salesforce sidebar open in my email that allows me to link an email to a grant record with a click. I also like the feature that allows me to upload attachments for each record. There will always be some manual steps required, but I find this to be pretty smooth.

Happy to share more offline - just email me.

Best,
Nicole Wallens, Ph.D. she/her/hers
Associate Director of Sponsored Research
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Tongva Land
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schedule an appointment

Cayuse – home-grown database and shared drive

Hi Jill,

We have a home-grown database to track that level of information. As a system, we have Cayuse for the official routing, approval, submission and document repository.   But for all the other bits and pieces, we have a database to track the info and then use a shared drive for other documents.

Here's a screenshot of our home page, where you can see our searchable fields.

Proposals   **Add**   **Export to Excel**

PI [dropdown]	Coordinator [dropdown]	☐ Not enough lead time	
Contract/award status [dropdown]	Region/country [dropdown]		
Contains text [ ]	Date logged, from [ ] to [ ]	Go Clear filter	

Page: **1** 2 3 4 5 6 7 8 9 10

Trk #	Due Date	PI	Agency	Agency award #	Coord	Title	Logged	Account	Amount	Status	Lead Time
25749		Hughes, D	Tennessee Distillers..	Agreement No. 2..	Hope	NCE to July? Economic Impact ..	3/18/22	R12-4110-187	0		
25748		Stewart, Jr., N	DARPA	HR001121C0167	Hope	DARPA LEXI - NCTE	3/18/22	R113815025	0	Und negot	
25747		Bates, G	USDA NIFA	Amd. 4? to 2018..	Hope	Co-PD change - Understanding g..	3/18/22	R11-2615-805	0	Und negot	
25746	3/31/2022	Yenerall, J	Gretchen Swanson Cen..		Matthew	From Policy to Reality: Determ..	3/17/22		0		Not enough
25745		Willcox, E	CESU		Steve	Enhanced Research and Monitori..	3/17/22		51650		
25744	4/26/2022	Griffith, A	USDA		Matthew	Factors Influencing Valuation ..	3/17/22		0		Not enough
25743		Richards, J	USDA NIFA	Amd. 1 to 2018-..	Hope	2nd NCE to 6/30/2023 - Buildin..	3/17/22	R12-5010-117	0		
25742		Dhar, M	Ourobionics		Allyson	MOU - opportunities for regene..	3/17/22				
25741		Dhar, M	Advanced Solutions		Allyson	Mutual NDA - opportunities for..	3/17/22				
25740	4/6/2022	Johnson, K	UTK - USDA		Amy	Growing Diversity and Opportun..	3/16/22				Not enough
25739	4/29/2022	Middleton, L	USDA NIFA RHSE		Karin	Rural Health and Safety Educat..	3/16/22				
25738		Jagadamma, S	Rodale Institute		-		3/16/22				

And then this is a screenshot of an individual record.

Proposal tracking # 25687

Field	Value	Field	Value
Old tracking #			
UTIA PI	Eckelkamp, Elizabeth (Liz)	Coordinator	CathyC
Agency	USDA AMS DBII ARP	Amount	19000000
Title	Dairy Business Innovation Initiatives - ARP funding		
Agency award #	AM20DBITN0002 (used to be AM200100XXXXG0	Contract/award status	
Date logged in	3/2/2022	International?	
Proposal due date	4/29/2022	(Ctrl-click to multi-select or clear)	Regional: Africa / Regional: Asia / Regional: Australia and Oceania / Regional: Europe / Regional: North America / Regional: South America / Afghanistan / Albania
Proposal #	22-3223		
Legacy proposal #			
ESM contract #			
Account #	R12-4410-083		
Award #		Lead unit	Extension
Project #		Not enough lead time?	☐
Confirmation #		Orange team?	Create review

Activity

Funding Opportunity Number "USDA-AMS-TM-DBII-G-21-0008
related to 22344/24596 - NEW contract- will get a new account numbers and also a new project number in Cayuse when awarded, as each funding increment before this one has.

The Dairy Business Innovation (DBI) Initiatives (7 U.S.C. 1632d) program has received new funding from the American Rescue Plan (ARP) Act (Pub. L. No. 117-2) for approximately $80 million. Please see the attached FY2022 DBI ARP Funds Solicitation Letter for further information. DBI Initiatives can apply at any time within 60 days of this notice. AMS will review the applications and, if approved, issue a new notice of award.

3/4/22 - sat in with Eckelkamp and team for zoom meeting. This will be $19M total, with $9.5M having to go out to producers via subs.   suggested building in more admin salary to help manage the subs. Asked Liz to complete PIQ so we can get it into our normal processes. - HRS
3/4/22 - received PIQ. Assigned to CC. Sent link for ORIED services to Liz - HRS
3/4/22-Assigned, emailed PI, and started in Cayuse-cc
3/5/22-Emailed program mgr about updated RFA and opp. number-cc
3/7/22-Emailed PI to answer Cayuse questions, and sent a timeline and a list of what we need; linked to existing project and added R12 account number to project-cc
3/8/22-Discussed particulars with HRS via Zoom; un-linked proposal from existing project, since we decided to follow the last 2 years process of a new project number each year-cc
3/11/22-Sent PI a reminder to visit Cayuse, and to send me a list of co-PIs with a draft budget; emailed C Holbert a/b 2 co-PIs at UTK-cc
3/18/22-Emailed H Means to let her know i can share a budget before we route if that's helpful-cc

Contact: Patrick Kelley
Lead Grants Management Specialist
Initiatives and Partnerships Program

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UTIA INSTITUTE OF AGRICULTURE
THE UNIVERSITY OF TENNESSEE

UTIA FACULTY: To notify OSP of a planned proposal, please use our PROPOSAL INTAKE QUESTIONNAIRE

EFileCabinet

We use eFileCabinet, emails are uploaded as PDF files with the leader: "Correspondence - ". If it's in there, it's important enough for someone else to need if they're covering for you. We don't track every conversation, just the ones that are critical to the project.
Kris Wolff – Fordham University

RedCap
I'm not the person with the expertise to develop it, but it seems to me that RedCap would be a great tool for this Brain Trust to develop.
My institution still charges $25/month for non-sponsored purposes so I haven't felt like I have been the right person to develop high quality templates without incurring charges akin to the situation of 'how-long-does-it-take-a-monkey-to-write-a-novel?' (I would likely owe them more at Retirement than I started out with)

I got a short free trial version from the Vanderbilt site which was helpful to see what it offered. There were extremely limited post-award templates, and what they did have was geared toward clinical trials.

Finishing my email with one thought – these self-organizational software systems can work for individuals – but how best can we at the Dept/Shared Services level enable supervisors to best view what the entire team is struggling with? (Note: Salesforce at our institution has only been a rather poor trial version that is only used centrally, and not with great results or satisfaction by those being forced to use it).

Margaret T. Murray
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SharePoint/MS Teams

Using SharePoint and/or MS Teams to track and store the details is an option.
With this option, you cannot be successful if some of your employees/colleagues are still operating with a "Paper Mindset". You will have to fully embrace paperless operations.

Patrick
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Awards Management Systems

Hi Jill,

We use attachments and notes in our current routing system to capture all important information and plan to do the same as we migrate to Cayuse.

Cheers,
Charna

Ms. Charna K. Howson, MA
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(She, Her, Hers, Charna)

This is what we do as well – keep as much as possible within our proposal and awards management system.

Vicki Krell, CRA
Pronouns: she, her, hers
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The College of Liberal Arts and Sciences
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Airtable to Sharepoint

Jill,

We are currently building out processes in Airtable that we find to have all of the functions necessary to track and capture these data. We also link the Airtable to Sharepoint for files.

Best,

Clayton Cottle I Director of Research and Sponsored Programs
Sam Houston State University I Huntsville, TX
e: cottle@shsu.edu p: 936-294-3119

Cloud Filing System

It's a constant challenge, isn't it? I am by no means an expert, but I do have two tips that are extremely helpful for me.

1. I keep a cloud filing system for each project. Each project, say "ARC Power" for example, has the same sub-folders: Documents, Correspondence, In the News, Financial/Vendor Files, and Contract Files. I share these files with the team and ask that they be sure to file everything there - including PDFing email exchanges on anything related. (Then I keep after them on a monthly basis like the organizational demon I wish I was.) This I learned from our NSF evaluators, and it has come in very handy.
2. Check out RoamResearch.com. This is a paid subscription service that makes my grant life much easier. It is a notetaking tool that enables you to cross-reference and compile by topic. It was a total game changer for me.

Best of luck to you. I look forward to seeing the advice from others.
Kristi Barnett
#grantsquad
Wallace State Community College
256.352.8231

Cayuse Grants

Texas Biomed uses Cayuse Grants, which has served us very well (we can send automated reminder emails directly from the system, input almost all important proposal related info, track projected out year awards/renewals based on award status and funding probability, Key Personnel tracking, Other Support (still in the old format unfortunately), and a whole ton of other canned reports as well as ad hoc reporting is a breeze to use)! We used to have 424, but we were unable to afford it for the past few years. There is always hope for the future though!

Hope this helps!
-Jon

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HI Jill,
It's surprising how we all have the same concerns but a variety of solutions. I completely understand the need for having one place to maintain it all if possible.

Luckily at Temple University, we use InfoEd which has all of the capabilities you have mentioned and more. Within the proposal record, there are dedicated tabs for communications (all different types, like notes, email, etc) including the option to track emails.

There are tabs for attachments and a variety of options there as well to organize, create folders, tag them, search/filter them.

Note: We also submit through InfoEd, so we have the submission and award tracking all in the same record.

We have been using all of those features for over a decade now and plan to use some additional features that have been added to track specific tasks and related communications.

The biggest advantage of the above is that it removes the reliance on emails and lookups as everything is available neatly (depending on your organizations filing standards 😅) in one place.

Good Luck and feel free to reach out if you have any questions.

Thanks,
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Uniform Folders – University System Drive (example attached to this email)

Hi Jill,

We also keep uniform folders on our university system drive. I have attached a copy of the master we use to create new tracking files for projects, but we do not break folders into monthly detail, we can sort by file dates for that when needed.

Cheers,
Charna

Ms. Charna K. Howson, MA
Director, Sponsored Programs
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Copy.zip

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