2022 ANR Customer Satisfaction Survey

Updated 2024 for Year 2

Office of Contracts & Grants				
PRIMARY OPPORTUNITIES			**ACTIONS TAKEN/IN PROCESS**	**OUTCOME/HIGHLIGHTS**
Prior Year 2021-22	**Current Year 2022-23**	**PO Identified**		
3.94	3.88	**Moving in a positive direction to better meet my needs**	Final Response:	**Year 2 (2023 updates)**
			1. Creation of templates for commonly requested documents that PI's can use for proposal creation	Commonly used proposal templates have been added to our website.
			1) I am really not sure how to address this. I think more staff and adjusted workloads will go a long way towards allowing us to respond in a more timely manner so that needs are met. 2) Better support staff to Academics. More and more we are engaged in non traditional SPO activities that take our time away from what we are tasked with.	Additional staff recruitments are underway.
			More in depth training for staff to better serve customers	
3.82	3.80	**Approval Time**	Final Response:	

			1) additional staffing is already under recruitment to accommodate higher workload. 2) I'm assuming this is on awards, not proposals. I know I personnally could be better in terms on following up on pending actions that are out to Sponsor/PI/or Sub which may help in some cases, however, some sponsors do take awhile to return contracts which is outside of our control, such as waiting for Board meetings or DGS signature.	Additional staff recruitments are underway.
			1. Create a standard approval timeline that all county directors are made aware of.	1. Create a standard approval timeline that all county directors are made aware of.
			1) Increase C&G Analysts to adjust individual workload. 2) C&G Analysts provide more timely updates to Academics re: status of items and explain more fully when things are beyond our control as well as confirm which things are not in our wheelhouse. There is a lot of misconception about what we are responsible for and many requests come in about the status of items that are not a part of our roles or responsibilities (i.e. post award) 3) remind PIs that they have a responsibility to provide us things in a timely manner. Responding to 5-alarm fires created by a PI can completely disrupt the Analyst's workflow and cause delays on other items being worked on. 4) Reducing administrative burden when possible. The re-establishment of certain verified sponsor policy waivers in REMS will assist greatly (one example).	
			Investigate areas under our control to streamline process in order to facilitate quicker approval rate.	

3.87	**3.81**	**Approval Workflow process**	**Final Response:**	
			1) Create easy summary of workflow process and ANR partnering units. 2) do we know where the concern is exactly? I.e. are PIs not being kept informed of where something is in the signature process? Or confusion on which unit to go to, OCG or BOC, on different actions? 3) There seems like there has been a delay recently in fund and account numbers being set up. I've had several PIs following up on the status of their accounts on good news letters that we sent out a month or more prior. Also, I've been getting frequent requests from CGA to re-email amendments becuase the analyst working on the action is helping out the assigned analyst and they didn't get a copy of the amendment. I'm not sure why they can't locate it from their efa@ucdavis.edu email. The workflow process between OCG, CGA, and BOC could be improved.	
			1. Update the proposal steps on the C&G website to something more concise	2. Have some sort of system that directly links the submission of proposals with IRB/IACUC/Compliance requests
			1) Increase C&G Analysts to adjust individual workload. 2) communicate more effectively on the process for getting items approved and clarity on where OCG roles end and where other units start	

			Institute staff protocol to "checkin" with items assigned to them in GTS and keep clients advised of progress of their proposals and awards	

ADDITIONAL OPPORTUNITIES IDENTIFIED	ACTIONS TAKEN/IN PROCESS	OUTCOME/HIGHLIGHTS
Effectively uses website to provide access to information and services (3.72)　　　　Year 2 (3.66)	**Final Response (Year 1)**	**Year 2 (2023 updates)**
	1) UC ANR has been saying for years that the website will be going to a new format and we've been holding off on major website changes in anticipation of this new format. Do we know when they'll finally switch over? Or do we start working on revising the website now? 2) Should we eliminate the PI Hub and just focus on the website?	Website has been revamped and is in standard UC ANR format. PI Hub was old and dated so has been removed from website.
	1. We should take a look at how easy it is to find information on our website	Website is easier to navigate now.
	1) make our website easier to navigate? 2) training on how to use our website?	Website is easier to navigate now.
	Maintain website with most recent and up-to-date information and update FAQ section	
Clarity of Policy (3.93)　　　Year 2 (3.61)	**Final Response:**	**Year 2 (2023 updates)**

	1) for all of these, I think we should reconsider the "welcome packet" to new advisors email that I suggested a couple years ago. That welcome email would include links to the different monthly webinar recordings, as well as links to our website, and information on applicable policy/procedures. However, it shouldn't overwhelm new advisors with too much information all at once, just provide basic information and links for where they can find additional information once they are ready to start working on proposals.	Welcome packets go out to all new academics at ANR within a few weeks of them coming on board. A list of training items, websites and links are given as well as their contact analyst.
	1. Consider creating a cheat sheet that has the most important policies so an individual does not have to go through everything, sort of like an FAQ	In the works
	1) Provide additional training to staff/academics on policy; 2) provide clarify on	In the works
	Post relevant policies on our website and provide FAQ if needed.	In the works
Clear Procedures (3.96) Year 2 (3.71)	**Final Response:**	**Year 2 (2023 updates)**

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	1. Work with PI's to ensure they are aware what is being asked of them and what we will be providing for their grants and proposals	
	1) provide additional clarifications on procedures regarding OCG; 2) some confusion exists because depending on project/sponsor/ the procedure may be different. Just when a PI thinks they understand the procedure they engage a totally different sponsor and what they thought was true no longer holds. Ex: someone only familiar with marketing orders collaborates with another University on a USDA-NIFA proposal.	
	Stay current with relevant procedure and policies with regards to proposal submission guidelines.	
Training for clientele (4.00) Year 2 (3.69)	**Final Response:**	**Year 2 (2023 updates)**

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	1. The County Directors should have a special training just for them where we highlight the most important proposal and award information.	Director/Interim Director attends monthly meetings and gives updates as needed.
	1) provide targeted training for new academics that just covers the basics of where our website is, what is GTS, how to find your analyst, etc.	"Fast Track" training was created in Spring 2023 for new academics to go over Intro to Contracts and Grants, GTS, etc.
	In addition to our monthly webinar; institute weekly "office hours" for each analyst (via Zoom) to better communicate and answer questions for clientele.	Contracts and Grants attends BOC Office hours on second Thursday of the month to address any questions that may arise.