

Internal approvals: There is another way

Hays, Kansas — When the folks at Fort Hays State University went looking for a way to streamline the grant-seeking process, it wasn't collaboration with outside entities they wanted to upgrade. They wanted to fix a cumbersome, frustrating system of internal approvals.

The system FHSU was using worked as long as everyone involved was on campus and there was nothing unusual or complex about the proposal. However, universities are by nature complex systems whose administrators travel widely and frequently. As a one-person office, Coordinator Leslie Paige had plenty to do without having to stop what she was doing to help researchers and school officials navigate the unintuitive system that was not easy to learn

"We thought we had come up with a solution to the old procedure of running forms all over campus for signatures. But the system we tried wasn't flexible and it was not responsive," Paige said. "It was tied to the campus email system and workflows but using it from off-campus was a problem, and many of our faculty and administrators travel internationally. Some times people weren't able to access information in a timely manner – and time is a critical factor with grants. Faculty would try to log on but didn't use it enough for it to become natural. So they spent a lot of their time being frustrated, and I spent a lot of my time guiding them through a process that wasn't very friendly."

As the university began shopping around for a better approval system, several features rated highly on Paige's wish list: The new system needed to be Web-based so it wouldn't require a large IT department to maintain. It needed workspaces where documents could be shared and interactions tracked, but it needed to be secure. It needed to be user-friendly for researchers who weren't especially tech-savvy. And it needed to be affordable.

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All those traits were present in the In4Grants program by InfoReady Corp., but in its original form In4Grants was designed for grant seekers who wanted to work with outside funding agencies and collaborating institutions. And while FHSU could certainly use those tools to advance its external funding activities, Paige's immediate needs were closer to home. So she began working with the InfoReady tech team to see if the system could be adapted to manage internal approvals.

"We basically did a lot of problem-solving with them," she said. "We gave them suggestions and they listened to us, and lo and behold these things started popping up in the workspaces. There were a few months of dialogue, a lot of back and forth. They did a demo with me, a demo with the dean, with the grants accountant and with selected faculty members who write a lot of grants. ... And we tried it very quietly, did a really soft launch where we piloted the program, tried it for a few things, then got together and talked about it. It was a really nice exchange."

The next step was to send through an actual proposal. Despite its complicated nature and the fact that several key faculty were traveling, Paige said the proposal went through the process smoothly.

"The (principal investigator) was really happy to be able to get the grant out, go back and see what documents were ready instead of having to keep track of emails and drafts, it was there in the

workspace, and they didn't have to make copies for the business office," she said. "Everybody who needs to can log in and see exactly what they need to have. And it's just burning up little bytes instead of burning up trees, so that's cool too."

On July 1, Fort Hays State turned off its old system completely. By the end of the month there were three grant proposals in the pipeline. And the question of whether In4Grants could work as well for internal approvals as it does for outside collaboration was answered. "They took a really nice idea in terms of collaborating and having shared work space, and turned it into other functions for project support offices," she said. Paige also said she has been impressed with InfoReady's willingness to improve In4Grants.

"This company is a young company, and I've seen a lot of pretty significant improvements coming around the bend", she said. "They are very responsive to customer feedback, and they've done their best to meet challenges we've thrown them. The customer service we've experienced has been exemplary."

About Leslie Paige: Leslie Z. Paige, M.S., Ed.S., NCSP is the Coordinator of the Fort Hays State University Office of Scholarship and Sponsored Projects. In addition to all pre award activities, she administers the IRB and the Undergraduate Research Experience. Prior to joining the university in 2003, she was a school psychologist, grant writer and project director for a local school district. Recognitions include National School Psychologist of the Year (1996), FHSU Alumni Achievement Award (1996), National Association of School Psychologists Presidential Awards (2001, 2007), Kansas School Psychologist of the Year (1994), and others. She has held numerous leadership positions for the National Association of School Psychologists, including Treasurer, Publications Chair, Ethics Chair, and others. Paige is a published author in her discipline and has presented at many national, regional and local professional conferences.

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