

**RESEARCH ADVISORY BOARD (RAB)**  
**February 7, 2016**  
**8:30-10am**  
**Medical Sciences Building, Chancellors Conference Room S-118**

**Attendees:** Chip Chambers, John Ellis, Clarice Estrada, Jennifer Grandis, Vanessa Jacoby, Jim Kiriakis, Gretchen Kiser, Steven Lazarus, Georgina Lopez, Teresa Moeller, Suzanne Murphy, Michael Nordberg, Feroz Papa, Christine Razler, Elizabeth Sinclair, Brian Smith, Matt Springer, Paul Volberding, Winona Ward

**On the phone:** Jean Jones

**Not here:** Jane Czech, Pam Den Besten, Joanne Engel, MC Gaisbauer, Xiao Hu, Mounira Kenaani, Wallace Marshall, Irene McGlynn, Synthia Mellon, Thomas Neylan, Theresa O'Lonegan, Nirao Shah, James Sorensen

**Guests:** Karen O'Neill, Eunice Stephens

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Winona Ward & Jean Jones, OSR Realignment & Subaward Update

See PowerPoint presentation attached

- Realignment Objectives
  - To align structural organization with functional organization.
  - To clarify roles and responsibilities, and eliminate duplication of effort.
  - To promote service quality & consistency through staff development, cross-training, retention and succession
- Contracts/Awards – Expectations
  - Cross training and workload management between GBC and RMS Award Specialists.
  - Shared best practices between RMS and GBC for contract and award processing.
  - Single gateway (RMS Triage) for GBC and RMS awards.
  - Proper training, oversight, compliance, escalation and decision making related to award review and negotiation.
  - Award Specialists will maintain team assignments, and continue to work collaboratively with Team Managers and RSCs within assigned teams.
  - Subaward Specialists are also assigned to teams in order to promote service continuity and consistency.
- Proposals/Grants – Expectations
  - The assignment of a senior level manager over proposal teams will:
    - ensure communication and service level quality across all teams (best practices); and
    - Ensure consistent interpretation and application of regulations, policies and procedures.
  - Consolidation of Teams A & J:
    - Will provide departments across both teams with immediate, experienced leadership oversight, and ensure solid institutional representation with sponsors.
    - team staff will become experts in multiple mechanisms (cross training),
    - Manager, with the support of Assistant Managers will ensure that pre award services are consistent across both teams.
- Subawards - Background & Objectives
  - 2015 BPI recommendations
    - Develop fast-track model for simple actions
    - New intake process, revise forms
    - Assess systems and roles/responsibilities
  - January 2016 proposal
    - Brought on 3 temp staff to cure backlog >400 transactions
    - Asked for 2 permanent FTE; partial support was approved and EVCP office provided remaining funds
    - Improvements shown on sub processing cannot be sustained without permanent FTEs; RAD support is needed for permanent FTEs
  - RMS took ownership of subaward request process
  - Delegated signature authority
  - Ongoing process review and streamlining
  - we are beginning to review metrics weekly

Questions/Comments:

- What requires an agreement?
  - Private organizations, foundations, non-profits, it depends on what is specifically needed

- This reorganization feels like extra layers of leadership, which sounds like more money, with the same current problems?
  - This is a zero sum game, we are not hiring any new staff positions, we are cannibalizing existing positions. We are also working on development and succession plans, in order to develop a professional track to build staff experience and hopefully keep them for years
- Can users go directly to the triage group?
  - Yes, we will communicate the new process
- With Jean's new role, a contact is needed for award questions
  - This will be provided
- Some research groups go through the business office, which is helpful for them, but inconsistent to our overall process, i.e. they work outside of RMS
  - We are aware of this and in the process of pulling them all in
- Are we examining the relationship between RMS and the various departments?
  - Mar Moredo will be looking into this, we are looking into having staff in the departments once a week, at meetings, visiting faculty, etc.
- Faculty members have expressed concern that they do not get the same support person more than once?
  - Each should have a dedicated person, we will continue to work on that
- Given that we have more proposals than any other UC, why are we lacking in FTEs?
  - Some of it is in-direct costs, and how the other campuses prioritize
    - Suggestion: we could have the departments help with support, i.e. staff in departments have signature authorization

#### Next Steps:

- None specifically noted

#### Jennifer Grandis, CTSI Faculty Survey Results & Next Steps

See PowerPoint presentation attached

- In November 2016, CTSI invited faculty from all 4 UCSF schools and the Graduate Division to participate in a brief survey.
- 485 responded to the survey out of an estimated 2347 faculty at UCSF (including clinical series)
- Main questions: Y/N: "Have you ever used CTSI services?"
  - "If no, why not?"

#### Questions/Comments:

- It would be helpful to see the metrics on various programs, especially K Scholars and pilot funding. Along with ways that faculty can help/contribute, including matching funds/co-investment/etc.
  - It would be also helpful to provide logical/march areas (RMS could help identify?)

#### Next Steps:

- Please provide any feedback/suggestions directly to Jenny

#### Karen O'Neill, Exchange Online Project Awareness Update

See PowerPoint presentation attached

- Project Imperative
  - Email on premise infrastructure expensive and in need of refreshing
  - Cloud infrastructure secure, redundant and cost effective, lowering total cost of ownership
- Benefits
  - Employees
    - Increased storage
    - Mobility
  - UCSF
    - Cost savings
    - High availability
    - Privacy and confidentiality
- There will be a new web-based URL for email

#### Questions/Comments:

- Are there any downsides to these transitions?
  - All changes to global distributions lists (not listservs) will have to be processed by the service desk. We are currently looking for a workaround
- Can downloaded email archives (on an individual's computer) be moved into the cloud?
  - Not in scope currently, but we will provide information on how to do it, post migration
- If we do not reconfigure our devices for the changes, will we see a drop in service?
  - No, once the switch is made, you will receive a message to restart and reopen, you should not have to make any changes. You will have to reconfigure mobile devices (but can wait until migrated/promoted)

#### Next Steps:

- Please contact Karen O'Neill or Mark Bering with any questions



# UCSF Email Moving to the Cloud

Project Awareness and Orientation

Research Advisory Board

February 7, 2017

Presented by Karen O'Neill

UCSF Email is  
Moving to  
the Cloud

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Keep calm.  
We've got your back.



To learn more go to  
UCSF IT website  
[it.ucsf.edu/projects/email-cloud](http://it.ucsf.edu/projects/email-cloud)



Email accounts migrating  
to the Cloud in waves

- Happening January - June 2017
- 50 GB email storage included

**UCSF** Information  
Technology

# Project Imperative and Benefits



- Project Imperative

- Email on premise infrastructure expensive and in need of refreshing
- Cloud infrastructure secure, redundant and cost effective, lowering total cost of ownership

- Benefits

- Employees
  - Increased Storage
  - Mobility
- UCSF
  - Cost Savings
  - High Availability
  - Privacy and Confidentiality

# UCSF Email to the Cloud



## PREREQUISITE:

### Exchange Unified Voice Messaging Migration

- ~ 9000
- February 2017



## Email to the Cloud Migration

- 40,000 mail boxes impacted
- Happening in waves, beginning in February 2017

# Old Voicemail to New Voicemail



- February 2017
- Voicemail box holders will be contacted directly before and after the migration
- Simple action steps once voicemail is moved
  - Use temporary PIN provided in notification email
  - Call in, and follow the prompts
  - Add name, change PIN, change greeting (if desired)
- Details on process and change available on the IT website
  - <http://it.ucsf.edu/>
  - Direct link to site will be provided in targeted email to impacted voicemail box holder
- Standard features: integration with email on computer and mobile devices
  - *Transcription services are not enabled due to issues with the transcription service*
- Additional features available via Web Portal, including resetting PIN, changing greeting and advanced personal call transfer rules



# Email Overview



- Pilot starting in February 2017
- Moving mail boxes in rolling waves throughout the remainder of the fiscal year
- Targeted campaign launching that includes
  - Awareness messaging
  - Timing of “your” mailbox migration
  - What to do once “your” mailbox is migrated
- Anticipated impact
  - Minimal if any impact on desktop
  - Each mobile device will need to be reconfigured
  - New URL for web access – <https://email.ucsf.edu>\* (\*coming soon)
    - Log-in/username = Your email address ([firstname.lastname@ucsf.edu](mailto:firstname.lastname@ucsf.edu))
  - Global distribution list updates will need to be submitted via the IT Service Desk

# Questions?

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