



**The University of Arizona
Higher Education**
Tucson, Arizona

Recognized as a global leader, the University of Arizona (UA) is also a leader in research, bringing more than \$606 million in research investment each year, and ranking 21st among all public universities. The UA is advancing the frontiers of interdisciplinary scholarship and entrepreneurial partnerships and is a member of the Association of American Universities, the 62 leading public and private research universities. It benefits the state with an estimated economic impact of \$8.3 billion annually.



Engineered for Ease and Insights

The College of Engineering at the University of Arizona crafts a collaborative solution to simplify a complex grant and contract management process

You can sit down with a faculty member and create a funding plan and develop models to determine what funding is available, what the needs are, how many graduate assistants should be hired. Those are the conversations we need to have to best achieve our goals.

— Lisa Rulney, Assistant Dean, Finance & Administration, College of Engineering

Engineering at the University of Arizona sometimes involves rocket science, but tracking and managing its grants and contracts shouldn't have to.

"When I joined the college five years ago, the accountants expressed their concern for what we've called shadow bookkeeping necessary to manage post-award administration of grants and contracts," said Lisa Rulney, assistant dean, finance and administration, College of Engineering. "They hated all the data entry, the complexity, and the lack of ROI involved with the process. They wanted a solution but never found one that worked."

That is, until recently. Over the last year, Rulney has worked closely with a team of accountants to craft a solution using Adaptive Insights' cloud-based software to plan, track, and manage the College of Engineering's research portfolio of roughly 200 contracts and grants, with annual expenditures exceeding \$25 million. The approach has created vastly improved efficiency and greater visibility into the grant management process and could serve as a best practice model across the university.

The many challenges of managing grants

For a range of reasons, grant and contract budgeting and management is inherently tough for academic institutions. For starters, there is not a lot of consistency. Grants and contracts come from a wide spectrum of public and private sources, including large corporations, non-profit organizations, and the federal government. The amounts, durations, parameters, and guidelines of the projects also vary dramatically. To top it off, a project can begin any day of

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— Barry Brummund, Assistant Vice President of FP&A



the year, making attempts to get a clear big-picture view of the year’s ever-moving research activity extremely difficult.

Complicating matters even more at the University of Arizona is the fact that the College of Engineering encompasses eight departments. Each department had developed its own system for managing grants and contracts, none of which were particularly effective at the department level, much less able to roll up to a top-line view and analysis of the research portfolio for the College of Engineering as a whole.

“The key win we were looking for was a uniform system that was easy to use, with a powerful reporting solution that could readily show what is budgeted for a project period tied to a specific grant or contract,” Rulney said. “So we wanted insight into details such as, What are the actuals for a certain period? What are the encumbrances? What expenses have posted or are going to post soon to get a true picture of the balance available for a project period? We just weren’t able to look at a project period anywhere near that level of detail.”

Big payoff implementing an easy, powerful, and fast solution

Rulney teamed up with Assistant Vice President of FP&A Barry Brummund to find a fix.

“Our starting point was to ask, ‘What makes these projects particularly complex?’” Rulney said. “We identified the big challenges, and then we worked with Adaptive Insights to implement solutions.”

Engaging grant accountants in the process also helped gain key buy-in from individuals who were understandably skeptical after several false starts with other approaches. The ease of use of Adaptive Insights for non-finance individuals was particularly important, Rulney said.

Since deploying Adaptive Planning, part of the Adaptive Suite, the payoff has been swift and significant. Rulney estimates that across the College of Engineering, grant accountants had been spending more than 300 hours per month just in supplemental reporting and shadow bookkeeping. Today, that time has shrunk by 80%.

“One of our grant accountants said what used to take her hours is now taking her just six minutes,” Rulney said. “Going into this, she was a skeptic. Now she is one of our ambassadors for the project.”

Adding value to the process

The time savings, productivity boost, and enhanced visibility for decision-making are huge wins. Yet, Rulney and Brummund are not stopping there. They believe the big-picture clarity into their overall research portfolio will position them to more effectively compete for and secure grants and contracts, critical funding sources for the university. The University of Arizona is recognized as a leader in research, bringing more than \$606 million in research investment each year.



“Our goal is to get to analysis,” Rulney said. “Saving time is important, but the case wouldn’t have been strong enough just saving time. We need to add value to process. When you free people from mundane data entry, then they can do true analysis. You can sit down with a faculty member and create a funding plan and develop models to determine what funding is available, what the needs are, how many graduate assistants should be hired. Those are the conversations we need to have to best achieve our goals.”

Brummund sees the College of Engineering experience with Adaptive Insights as a template for success across the University of Arizona. “At the university level, we will probably be able to free up five to 10 FTEs to do higher-value activities,” Brummund said. “I hope this allows us to get greater proficiency in the proposal development stage, which is in effect our sales cycle. It’s our business development, so we want to turn our FTE savings toward supporting that effort.”

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