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**Successfully implementing research analytics and
dashboards without scaring or scarring anyone!**

**Research Analytics Summit
March 2024**

**Alex Wagner,
Director of Research Administration Analytics
Emory University**



Agenda

- Emory University's Research Enterprise
- Research Data Analytics Team and Roles
- Why should we care about operational efficiency?
- Joint Statement on Analytics!
- Institutional Effectiveness
- Emory Background
- Selected Metrics Examples
- Metrics Reactions and Challenges
- Change Management and Metrics Implementation
- Q&A



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Emory University's Research Enterprise

- Atlanta, GA
- R1:Very high research activity
- FY23 NSF HERD TRE >\$1B
- About 61% Total Federal
- About 26% Total Institutional
- About 66% Health Sciences
- Most of that is from NIH



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Research Data Analytics Team and Roles

- Formed in October 2020 and build out since
- 4 Full-Time, 1 Temporary Part-Time, 1 Intern
- Support ORA (Operations) and SVPR (Strategy, RD, TGSO)
- Strategic and Competitive Analysis
- Everyone is required to train in Research Administration
- Tools reach from Excel, SQL Developer, Oracle Analytics, SPSS, JMP, PowerBI to Tableau



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Why should we care about operational efficiencies?

- -> **Joint Statement on Analytics!** (NACUBO, AIR, EDUCAUSE 2019), in process of being updated
- The urgency of using analytics within higher education to make strategic decisions drastically increased following the COVID-19 crisis.
- The resulting forced shift to remote operations drove, and continues to drive, the need for increased usage and reliance on data-informed decision making. Many institutions faced dramatic revenue decreases as well as substantial increases in expenses because of the crisis.
- More robust data and analytics are urgently required to enable institutions to better understand their operations and the relationship between revenue, expenses, and business operations.



The Joint Statement on Analytics

- <https://changewithanalytics.com/>
- Makes an institutional case for the need to change via analytics



Go big.

Make an institutional commitment to analytics.



Analytics is a team sport.

Build your dream team.



Prepare.

Be ready for some detours on the road to success.



Invest what you can.

You can't afford not to.



Analytics has real impact on real people.

Avoid the pitfalls.



Tick-tock, tick-tock.

The time to act is now.



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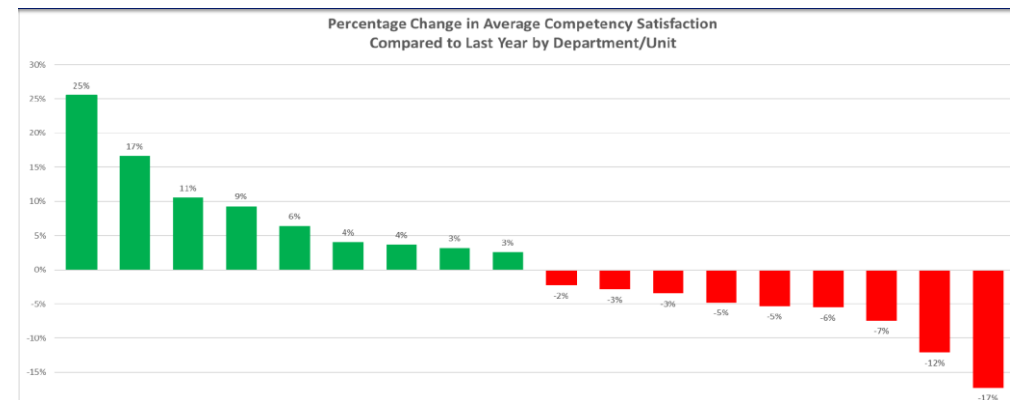
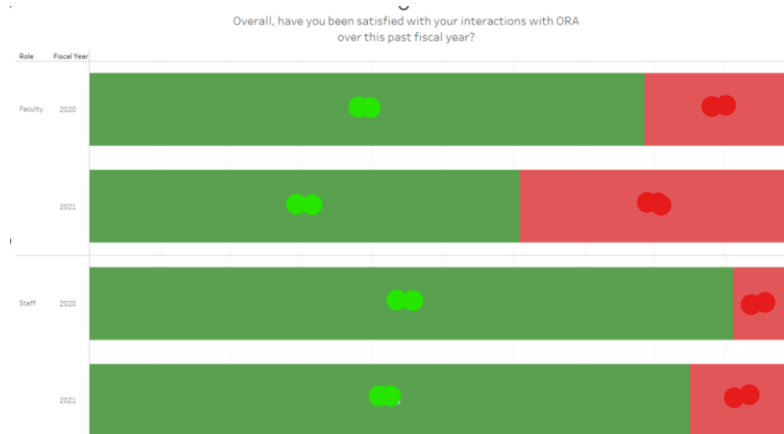
Institutional Effectiveness (IE)

- The resulting improvements are needed for institutional effectiveness improvements in order to survive financially and thereby enabling institutions to fulfill their missions.
- Institutional Effectiveness (IE) can be defined as a process whereby institutions engage in ongoing self-evaluation in order to measure achievements and outcomes as they relate to the institution's mission. Including its administrative services.
- One example of administrative services is research administration. Analytics and process improvement professionals should work together to enhance its operational effectiveness and efficiencies.



Emory Background

- ORA Strategic Approach and ORA Strategic Plan
- Operational aspects across the board (collaboration with Strat Ops Team)
 - HR Metrics (Time to fill positions, turnover)
 - Mission Metrics (Volume, Time, Quality)
 - Annual Faculty Satisfaction Survey (Timeliness, Competency, Customer Service)



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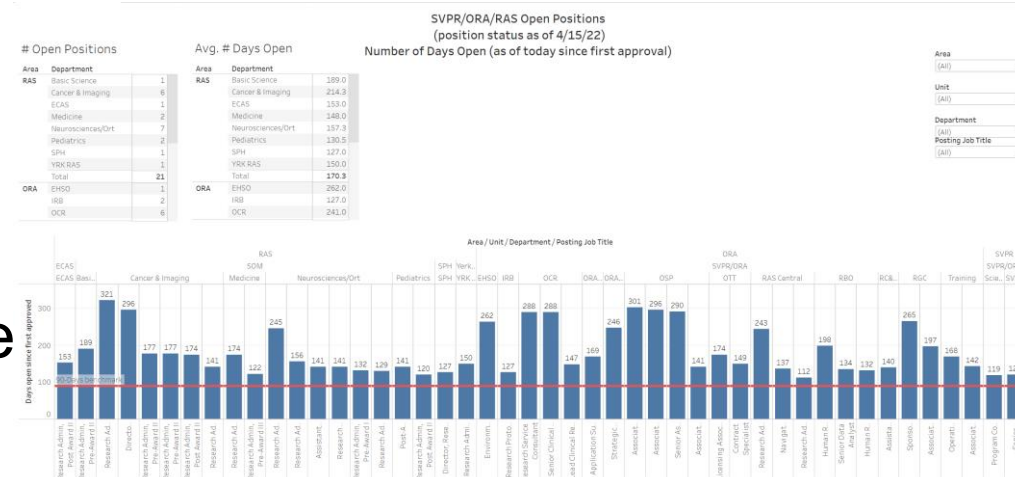


- New world of work satisfaction surveys
- Research Administration staff
 - Satisfaction with current work environment (remote, hybrid)
 - Employee needs (e.g. resources)
 - What can leadership improve?
- Quantitative and qualitative analysis
- By department and employee type (e.g. staff, managers)



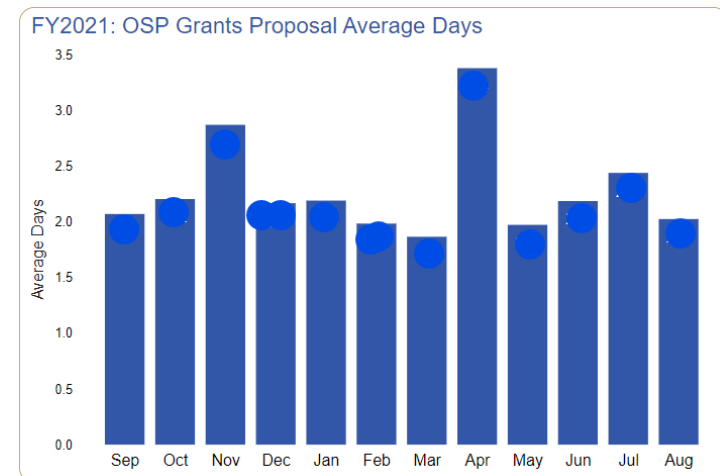
Example metrics: HR Metrics

- Ongoing analysis
- Demographics
- Recruitment
- Number and type of open positions
- Time to fill positions (including by position type, source, etc.)
- Turnover and transfer outs
- By department, position, and employee type (e.g. staff, managers)
- Monthly, quarterly, and annual comparisons



Example metrics: Operations

- Ongoing analysis
- Outcomes (e.g. proposal and award dollars by all kind of dimensions)
- Volume (e.g. number of proposals, contracts, grants by all kind of dimensions)
- Time (e.g. processing times of above by processing steps and all kinds of dimensions)



Metrics Reactions and Challenges

- Pushback and lack of trust
- “That data can’t be correct!”
- Data Quality! Data Quality! Data Quality!
- Process documentation
- Business processes and System processing
 - – up to 900 days to submit a proposal???
- System integration!



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Change Management!!!

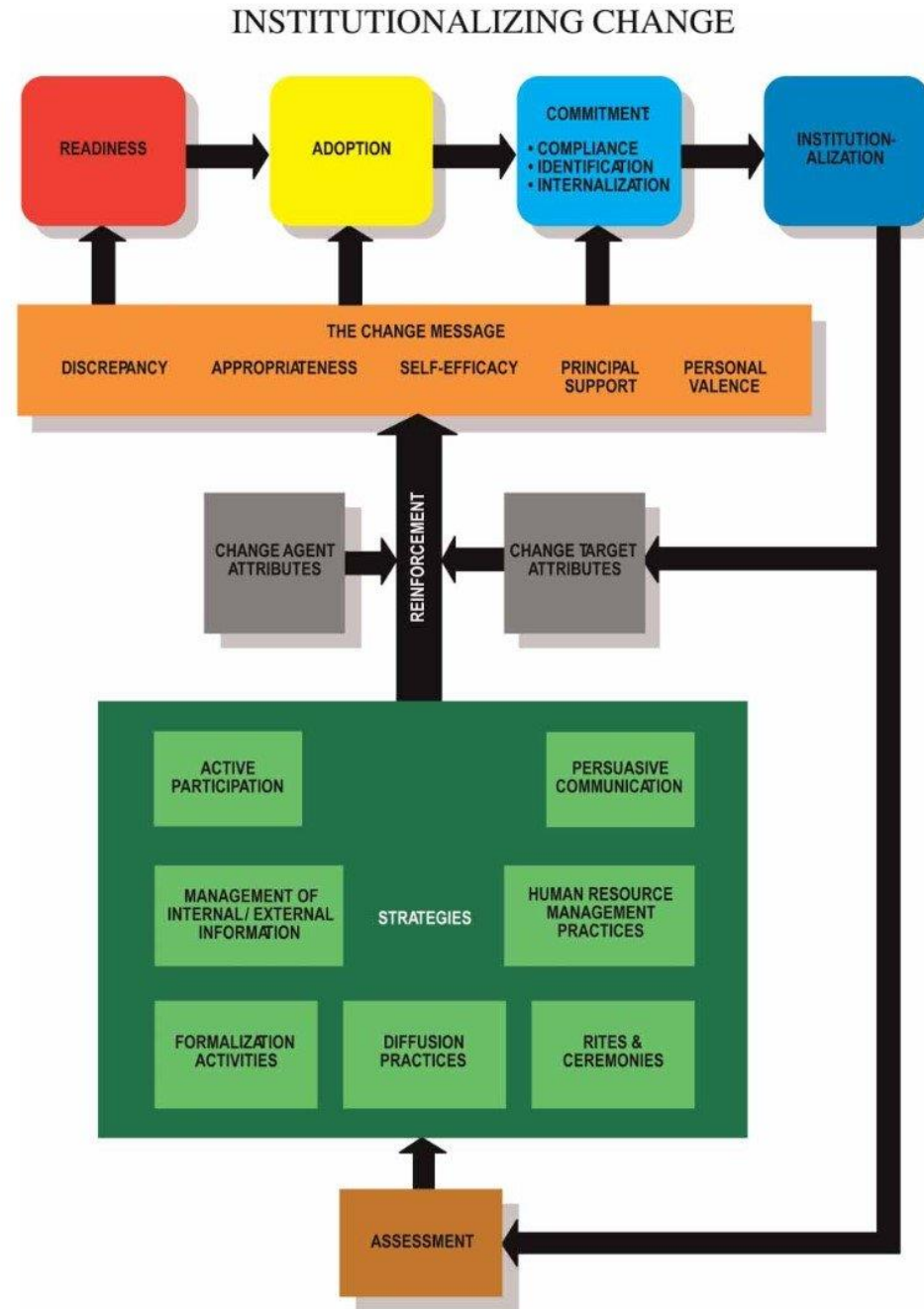


Figure 2. The institutionalizing change model



Metrics implementation

- Communicate! Communicate! Communicate! Rinse and Repeat
 - Active listening
 - Crucial conversations
 - Change message
- Relationship building
- Align your work with research administration and the institution
- Collaborative process mapping
- Develop shared understanding of Data
- Socialize metrics
- Share results with internal and external stakeholders



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Questions?



Alex Wagner
alexander.wagner@emory.edu
Emory University

