INFOREADY PEER SPOTLIGHT WEBINAR:

From Burden to Breeze: Simplifying Limited Submissions

Summary

In this Peer Spotlight Webinar, Carlos Moncada and guest panelist Tanya Volkert from the University of California, Berkeley, delve into the intricacies of managing limited submissions using the InfoReady platform. The session begins with an introduction to InfoReady's functions and the webinar's logistics. Tanya Volkert shares her extensive experience in efficiently managing a high volume of limited submission competitions, emphasizing the importance of streamlined processes and effective template management. She provides a step-by-step guide through UC Berkeley's limited submission process, highlighting the utility of InfoReady's features, such as Invisible Fields and template customization. The webinar concludes with a Q&A session, addressing audience queries on template management, submission processes, and reviewer selection.

Transcript

Introduction

Carlos: Let me tell you a little bit about InfoReady. Let's set some context, tell you a little bit more about InfoReady. So InfoReady is a platform, a centralized platform that really streamlines the collection of applications and forms and the routing for review and approval processes. We manage both competitive administrative processes and more administrative workflows. That's done a few different ways in the system. You're collecting applications, you're able to review, you're able to track the reports, you're able to assign different tasks. You're even able to collect follow-up reporting. The ways people use it can vary significantly. On screen, we're going to show you a list of different use cases. You can see the process varies significantly, and at the same time, it's all across campus in the different units. Basic concepts of the platform are very helpful in this regard. Collect a form or an application and route it through a workflow for review and approval. Pretty simple, but it happens all over a college and university. Then now that I've spoken about InfoReady, let's get on to why you're here today, the presentation.

Allow me to introduce you to Tanya Volkert. She's a program manager for limited submissions at the University of California, Berkeley. But a little bit more about Tanya. In her role, she manages internal competitions for limited submission funding opportunities. Prior to joining Berkeley, Tanya worked in research development at Rutgers University, where she managed internal ideation and seed funding programs in addition to limited submissions. Now, Tanya has used InfoReady for internal competitions since 2019. That's five years of using InfoReady. So lots of experience, lots of knowledge and wisdom to share on the webinar today because she has transitioned manual administrative processes at two institutions and putting them into InfoReady. You're going to hear lots of good feedback, lots of good ideas on how to manage processes in InfoReady. With that, I will turn it over to the star of the show, Tanya Volkert.

Importance of speed and efficiency in limited submissions

Tanya: Thanks, Carlos. Hi, everyone. Thanks for coming to hear about some of the tips and best practices I've learned about using InfoReady for limited submissions over the past five years. Thanks for doing that math there for me. It still feels like I've only been doing it for one year, so time goes really quickly. But hopefully, some of the lessons I've learned will translate to your own processes and can help improve the workflow you're doing in the ways that I've tried to improve our own here at Berklee.

Next slide, please. So limited submissions, I think, are a really unique use case in the InfoReady system for a few reasons. The primary one is the number of competitions that we are working with when we're doing limited submissions. I'm often posting multiple competitions a week to InfoReady, sometimes multiple in a single day, depending on what funding opportunities are coming out. Sometimes those competitions are really time sensitive due to the quick turnaround time between when we learn of the funding opportunity and the sponsor's earliest deadline. We need to move really quickly on limited submissions sometimes. The ability to post competitions quickly is really important, but in addition to quickly posting, it's also important for them to be efficiently posted because of the volume that we're working with.

The other complicating factor for limited submissions is that sometimes we set up competitions that we do not know if there's interest on our campus in applying to them. We don't know if they're going to be competitive or not. Again, for efficiency question, we don't want to spend too much time setting up a competition if it's not going to be of interest to our faculty anyway. Both speed and efficiency are really valuable for limited submissions in particular, versus in my prior role, I was also doing some seed funding, and maybe we had two or three a year, and I could really spend a lot of time trying to build out each one and customize it really specifically. Limited submissions, because of the volume we're working with, I do a little bit less customization, so I want a process that's going to work for all of the competitions we're working with.

Explanation of the high volume of competitions and applications managed

Next slide, please. So, when I mentioned that volume, I wanted to talk about what I really mean by that. Every institution is going to have different numbers that they're working with based on what opportunities are a good fit for your campus. At Berkeley, for our example here, I posted 158 limited submission competitions to InfoReady last year.

So, you can see why it's really important not to need to start from scratch every time I have to post a new competition. That would just be an incredible amount of work to do. Of those 158 competitions, 103 of them received a number of applications. That means about a third of the competitions that I'm posting to InfoReady get zero applications. There's no one on our campus who's interested in applying to them. It's still good that we post them, and I try not to look at that as wasted effort, because with limited submissions, we would try to err on the side of caution there. We want to do our due diligence, and generally, we'd rather post a competition that we end up getting no interest in than not post a competition at all. But I do want my time and my effort in posting them to be relatively minimal. Of the 103 competitions that received applications, only 35 of those competitions received more applications than we are allowed to submit to the sponsor. So only 35 needed a full review and selection process. That doesn't sound like a lot, but there were 276 applications within those 35 competitions. It's a really high volume of applications in addition to the high volume of competitions that we working with.

A huge benefit for InfoReady is helping us keep track of that really high number and not have to manually track them, which was probably the most time-consuming element of them pre-InfoReady.

Detailed explanation of the limited submissions process at UC Berkeley

Next slide, please. I'm going to tell you a little bit about the process that we use here at Berkeley for our limited submissions. Then we'll take a look at each of these steps, and I'll highlight how exactly we're saving time and effort in each of these phases with how we've set up InfoReady to work best for us. This process is probably going to look different from what you're doing at your institution, because every institution has a different context. Your workflow is just going to be different. But I do hope that the lessons learned from what works for us are generally applicable to the limited submission set up that works best for you and even for other kinds of competitions that you might be doing in InfoReady.

Here at Berkeley, our first step is finding a limited submission, and then we need to post it and advertise it to our campus. Then we use a two-step application process where we first collect a very brief notice of intent to determine whether or not a review process is needed. If the number of notices of intent that we receive in this first phase does not exceed the sponsorship limit on the number of applications our institution can submit, then we skip the next four steps here and we jump directly down to selecting and notifying the applicants. This helps us save some time by not needing to do steps that aren't going to be necessary because we only have one interested applicant. It also saves time for our applicants to do this notice of intent strategy because they don't have to spend the time to create their 2-3 page campus application. Instead, they can just get the approval and start working directly on the application that will go to the sponsor. Using this notice of intent stage really helps me with my administrative work and reducing it, and the applicants really appreciate when we're able to do this step. But if we do receive more notices of intent than we are allowed to submit to the sponsor, then we do require a campus application from those interested applicants.

We then return the notices of intent that were submitted to us back to the applicants for them to resubmit and send us some more information. We collect those applications, and then we move on to our review stage, sending them to reviewers in the system and collecting their reviews. Between collecting reviews and selecting the nominees, I work with the campus leadership here at Berkeley to determine, based on our reviews, who is the most competitive applicant to submit to the sponsor and notify them. We do some really brief report collecting at the end of the process to see whether or not the applicant was selected for funding by the sponsor after they submitted. Before taking a look at each of those steps in detail and how exactly we're using InfoReady to handle them. I want to share some template tips because this process mainly works for us because of the way we have our templates set up.

Tips for setting up and managing InfoReady templates

Next slide, please. First, overall, the biggest thing that saves me administrative effort is having a really good template set up. As Carlos mentioned, I've implemented InfoReady twice at two different institutions now. My second time here at Berkeley went a lot more smoothly than my first time because I had a better sense of what I needed to collect and what information I wanted as the administrator to get out of the system.

That helped to inform me how I needed to set up my template from the start. So I really encourage you, whether you are yet to implement InfoReady, or you've been using it for years, take the time to rethink your template to make sure you're getting what you need out of it. I update my templates a few times a year with things that I've realized will improve my existing system. Even if you set up a template and you think it works well, remember to keep going back to it to try and find those efficiencies.

For me, I want a template that is going to need small, relatively minimal, simple changes for each competition because I'm posting so many. I need a template that's going to work for multiple scenarios. For example, whether I get one notice of intent response or 10, that template needs to work for both situations. I want a template that can be updated piece by piece. When I post a competition, I don't usually know how competitive it will be or whether it will be competitive, whether it will receive any applications to it. I don't want to spend time setting up stages of my process that I'm not going to end up needing. So I don't want to waste my valuable time and effort.

I want my template to be set up so that I can edit it and customize it piecemeal in order to save me time in the long run.

Next slide, please. So I'm only editing my template as needed for the given stage that I'm on. This shows you what I'm updating at each stage. You can see when I post an opportunity, I only have to update two things, the details page and one of my notifications, and then I launch. So that's really quick for me to get that competition out the door and into my faculty's hands to start submitting to. And I worry about all of the other steps later.

Next slide, please. I just wanted to give you a reminder about my numbers for why I approach my competitions with this method. Note here that I only edit my requirements page at the second stage on this slide at the return to applicants part of my process. I only do that for the competitions that I have more applications than we are allowed to submit to the sponsor.

Remember, there were only 35 of those. Compare that to the number of competitions that I posted, which was 158, and you can see just how much time I'm saving by not needing to edit the requirements page for the full 158 competitions that I post. You'll also notice that some of the pages I am editing multiple times throughout my process, like the details page is edited at three of these steps, but I'm editing different things each time. I'm just editing the things that I need for that stage, again, to try and make it more efficient for myself.

Use of Invisible Fields in InfoReady for effective data management

Next slide, please. Another note about your templates is to make use of the Invisible Fields feature that InfoReady allows. I set up Invisible fields that only myself as the administrator can see. That's something that I didn't think through at all in my first implementation of InfoReady that I set up here at Berkeley on day one, because at the end of my time at my prior institution, I knew a little a bit better what data I wanted to be able to report on over the long-term span of using InfoReady for my limited submissions.

Again, whether you've implemented it already or are thinking about implementing InfoReady, think about the characteristics or trait that you might want to be able to report on or filter by at the end of the year, and make sure you've added space to capture it for yourself, and it doesn't need to be visible for the applicant. You can make things that are only visible to you. We'll take a look a little bit more about some of those things that I'm capturing invisibly in a few slides.

Posting opportunities and using templates efficiently

Next slide, please. Getting into how we run each step of our process, posting and opportunity has gone from a manual system of listing something on our website and emailing it around to people on campus to a much more standardized process with the InfoReady template and notice of intent form. We do still email out an announcement about limited submissions to our faculty, but we include an application link, and it makes our process look more modern and efficient to have an email and say, apply here if you're interested, than to have a paragraph explaining what they need to email and how they need to submit, which was our previous process.

Next slide, please. When I'm posting, I only need to update two pages. I need to update my details and one of my notifications. I've set up my details page to have these additional fields that I can really quickly copy and paste the information from my limited submissions tracking document where I'm listing the opportunity that we identify as limited as we identify them. I just quickly copy that information. It makes it quick and easy to have fields that I could just copy the text over into.

Next slide, please. Here I'm showing the rest of that details page, and you'll see the four fields at the bottom don't have that blue checkmark. Those are only visible to me as the administrator. These are things that, again, I want to be able to figure out, but my applicants don't necessarily need to see or know, and maybe it would just create some confusion to list some of this information there. For example, I list the type of sponsor, and as I'm posting this, I'm going to list whether this is a federal opportunity or a foundation opportunity. My faculty don't necessarily care about that. Some of them do, but normally they just want to know, ‘Is this a relevant opportunity to me?’ It's helpful for me to know, so I can look for trends, again, not necessarily something my faculty need to know. Those are my invisible fields.

Next slide, please. After updating the details page, I also need to update the Your Application Received Notification template. You can see here my template is mostly written for myself, and I just need to update two things on it. I need to add the name of the competition, and I need to add the date that the applicants will need to submit the next step to me if it's needed. After that, I am good to go. I've updated my details and my notification. I can launch and start sharing this competition with my faculty.

Next slide, please. Then I'm in a bit of a waiting period. Before we had InfoReady, this was a more active waiting period than it is now as I had to track emails as they were coming in, create lists to track who has submitted to me and to what. On really busy days where we had multiple campus deadlines, you can imagine that our inbox would just become a mess to keep track of.

You're really relying on people not to make a mistake and not to miss an email about a competition or to not mislabel it for the wrong competition. Now with InfoReady, all of the tracking is done automatically, and I don't have to worry about it until I want to go in at the end of the day to see who submitted before the deadline.

It's also nice that you can require fields to be submitted so I can reduce any back and forth that I might need with applicants before. It's really common where an applicant would email us and say, ‘Hey, I'm interested in submitting. Here's my contact information’. But they wouldn't tell us what opportunity it is that they're interested in, or they just miss other requirements that we need to know, and we'd have to go back and forth to get that information from them. With InfoReady, a lot of time is saved, both by not having to track and reducing the missing fields that we might see.

Managing notices of intent and campus applications

Next slide, please. If we receive more notices of intent than we are allowed to submit to the sponsor, then we use the Return to Applicants feature, and we add in our additional requirements.

At this stage, I further edit the details page, and I add in my additional requirements. I will get to that in a few slides. Then I edit that same notification we just looked at the Your Application

Received notice. I send those notices of intent back to our applicants and ask them to provide the new materials.

Next slide. The only thing I really have to update on my details page at this stage are my dates. You'll see the bottom four dates--our two campus deadlines, that notice of intent deadline in our campus application deadline, and then any of the sponsor's deadlines. That's what our applicants are looking for when they're figuring out what the timeline is for an opportunity.

The first deadline that is listed there is the deadline that InfoReady closes. When I post it as a notice of intent, that first deadline is the same as my notice of intent deadline to campus. I'm going to change that date now to say the second campus deadline, say November 13th deadline in this example. I also update the apply button label.

Next slide. You see my date has now shifted to my second deadline, which reopens the InfoReady system and allows the applicants to resubmit their materials, And now that button says, Submit campus application instead of Submit Campus, Notice of intent.

Next slide, please. The second thing I need to edit at this stage is the requirements page. Now, I didn't touch this requirements page the first time I edited the competition. What you're seeing here is our template fields for the notice of intent. I'm going to leave these the same for my campus application. The applicants can edit it if they've decided to change their project title or change their two-sentence description, but we leave it the same so that they don't have to refill out the information that they've already provided to us. When we turn it into a draft, they get this back as they filled it out and can update it. You can see for our notice of intent, it’s really simple. We want it to be quick and easy for the applicant to submit to us. We just ask for contact information and that title and brief description.

Next slide, please. But for the campus application, that second deadline, now I need the campus application documents. For us, we usually ask for three documents to be sent. We ask for a summary, short CVs, and then we ask for a budget estimate. Some competitions maybe we'll ask for a fourth item, a letter of support from a chair, for example, but generally, these are the three that we go with at this stage.

Next slide, please. After I've added in those document uploads to our requirements page, I do need to edit some of our notifications. I am reediting the Your Application Received notification. I just need to update the subject so that it says campus application received instead of campus notice of intent received. Then I just remove text from the template. I've written our thank you for submitting your application text here so that it works for both scenarios. I don't have to retype this text. I just need to delete out the portion that was for the notice of intent, and then it's good to go.

Next slide, please. The last thing I need to edit here is the return application notification. This is the notice that our applicants are going to get when I take their notice of intent application that they've submitted, and I return it back to draft form so that they can resubmit to us. This is all preset text. The only two things I need to edit every time is the subject, again, with the name of the opportunity and the date that they need to submit to us by. Everything else stays the same competition to competition.

Next slide, please. Now, after making those edits, I'm ready to use the Return Application to Applicant feature in the batch actions, and then I am done.

Next slide. I go back into my waiting mode, which InfoReady, again, has made much easier. I no longer have to monitor those emails, download out attachments, combine them into a single PDF and save them somewhere. And it already just does all of that for us, and I'm very grateful that it can.

Again, that mandating field is really helpful here because our applicants aren't going to miss sending one of the required documents because I've set them to be required in the system. When applications are submitted, I do still preview the applications to make sure that the applicants have complied with all of our requirements and have submitted all the materials. But I still check to make sure that they are within the page limits or the word limits that we have set for the competition.

Handling application reviews and selecting nominees

Next slide, please. Sometimes, no matter how clear we think our instructions are, the applicants miss a requirement, or they don't follow the page limits that we've set, or they notice a typo after they've already submitted, and they want to fix something.

As the admin, you always have the ability to edit the application directly from your end, and that saves me time because it's really quick for me to go in and make some simple edits. I can always return the application again to the applicant and have them resubmit for a larger change. But generally, it's really quick and easy for me to go in and make an edit.

Sometimes the applicants have trouble submitting, and they do still submit their materials by email. It's relatively rare, so it's not too much effort. The system allows me to submit by proxy from my end, which is really helpful because a lot of times with limited submissions, I like to move quickly to the next stage. After this, I'm going to be sending the materials to the reviewers.

If an applicant has a technical problem, like they couldn't get into the system for some reason, I can collect their materials and submit as a proxy and then move on while I then help them troubleshoot what their issue is. If I didn't have that proxy option, I would have to try and fix the issue with them and then have them submit. It could be a couple of days delay while we figure out what the problem is that they're experiencing. While those problems are rare, they do happen in that ability to submit by proxy has been a real saver for me.

Next slide, please. Once the applications have been submitted and I've done my preliminary compliance checks, I'll then work on sending them to my reviewers. This is when I go back and edit the competition again, and now I'm editing my routing step and my reviewer notifications. So time savers here, I don't need to download the materials and save them somewhere and give the applicants the ability to see the materials. I'm just clicking off the applications, batch action sending to my reviewers once I'm ready. So it's been a huge timesaver.

One best practice is that I've learned to CC myself on the notifications to my reviewers because our reviewers are busy people. Sometimes they'll miss that automatic email that they get from the system. I like to have a copy myself, and then I follow up with my reviewers a day or two after I've assigned them in InfoReady, and I just say, ‘Hey, I wanted to make sure you've seen this and you were able to get into the system successfully, just to make sure that they have the information that they need.’ And often, they'll see my name before they'll see the team name that the InfoReady automatic emails come from. That is really helpful to CC yourself on it just in case.

Next slide, please. Okay, so let's take a look at what I need to edit here as I'm sending my materials to the reviewer. One thing I've learned in my latest iteration of updating my template is to set up multiple concurrent routing steps in my template. So for a given limited submission, I have the choice of which preset routing step is going to best fit how I need to review this current competition. So this is one of those time-saving steps that reduces all of the extra work of needing to customize the review step every time.

Now I just have three set steps for my three most common types of reviews that we use. Here is my default review. This is the one we use for most things. It's a really simple review form, collecting a score and comments from my reviewers.

The second one here is my review committee meeting. Sometimes in our process, we don't collect individual written reviews from our reviewers. Instead, I attend a committee meeting and I take notes, and I submit them, a summary of the notes from all of the reviewers into InfoReady for myself. That's what we use that second step for.

The third common type of review that we do is to share the application with another office on campus and get their feedback on it, but they're not part of the review committee and they don't provide a score. For example, I use that third step to share materials with our foundation relations team who sometimes want to capture the feedback that they want to share with the applicants right in our same system.

Next slide, please. I'll choose the routing step that I'm going to use for this competition, and then I will edit the reviewer instructions as needed. I always provide links to the RFA or the sponsor's website and some opportunity-specific specific review criteria and instructions.

Next slide, please. If needed, I will update the review form, but for the most part, I leave it as simple as this. We do a very simple form at Berkeley. It is a rating and it is a comment box. But sometimes I could add a solicitation-specific question here, 'like how well does the applicant respond to X criteria in the sponsor's guidelines?', but usually, I don't have to touch this at all before I'm ready to send to my reviewers.

Next slide, please. After making those edits, I go in and assign my reviewers, and I get to go back to my passive waiting phase of waiting for those reviews to come into the system.

Next slide, please. As with the applicants, sometimes our reviewers will run into issues submitting their reviews or where they might realize that they've made a mistake and need to edit something after they've submitted. In my reviewer instructions, I always tell them to email me if they've discovered an issue with their review and need to update it. Then usually, I just go in and update what they've told me to do. Similar to returning the application to the applicants, I can do a process to reopen that review up for the reviewer to the edits directly, but it usually saves me time if it's a simple enough edit for me to just go in and edit. I do have the option to review as proxy if needed. This is rare, but sometimes my reviewers have a technical issue like the applicant they might run into, or they might have some reluctance to use a new system that they haven't logged into in the past.

I can always collect reviews through email and submit by proxy so that the system is capturing their reviews, even if they haven't logged into the system from their own end. I will say that that issue of reluctance to use the system has been really rare. I think once so far in my two years at Berkeley, I've had to submit by proxy, but it's nice to know that the option is there as a backup if we do run into issues.

Using InfoReady features to streamline processes

Next slide, please. When scores come in, I download out the raw review scores report from InfoReady, and I do some slight editing to that default report. I usually like to see my scores listed as individual columns, and they come out in rows. So I have just a quick editing that I'll do there. Then I work with my institution's leadership to finalize and select our applicants.

Next slide. Now we come to some of the final edits that I will need to make in the competition in the system. So I need to update my notifications that are going to go out to my awarded and rejected applicants. You can do that in two ways.

I can either go in and edit the competition and change the template text there, or I can update and edit the notifications as I hit Award. It will let you edit what your template is filling in before you hit the Send button. I usually find that for competitions with many applicants, it's better to edit my competition template. But if there's only one or two applicants, I might skip editing the competition, and I'll just hit the Award button and edit the notification as I send it out.

Next slide, please. I've set up my award notices to work for multiple scenarios. So I remember that 35 of my competitions last year needed a review, which means 68 competitions did not need a review but did have an applicant that was awarded. In my template, I have text for both of those scenarios, and then I simply delete out the section that doesn't apply based on what the outcome was. If I had only received one application for this opportunity, I need to send an award notice and tell them they're approved to apply, but they weren't reviewed. I would delete everything from that first circle to that second circle. I don't need to rewrite text here. I just need to delete things. That works quickly and effectively for me because I never remember how I said something in the past. I don't need to remember, the system has me, has my back.

Okay, next slide, please. The last thing I edit in my competition is my reports. I do schedule out a report to go to the approved applicants after the anticipated notification date. It's a really simple form. We essentially want to know, ‘did you end up submitting and were you funded by the sponsor?’ So instead of manually having to look that up, I can just ask them to quickly fill that out.

Next slide, please. Here's what that looks like. You'll see it's really, really simple. It takes the applicant 30 seconds, but it saves me an hour.

Next slide, please. After finishing up that limited submissions process, I do go in and edit the details one more time, and I'm going to make sure that my invisible fields are all filled in. Now I'm going to add in the outcome, and was it competitive? Did I receive no applications, for example? Again, that data is what I want to report on at the end of the year.

Some of this information, InfoReady separately captures automatically, such as who were my selected applicants and who were my reviewers. I can download a report from InfoReady for that, but I like to have it pull out automatically into the same Excel sheet. I find that it's quicker for me to add that information here than to have to pull the reports and merge them in some way at the end of the year.

Next slide, please. This is just an example of what I do with that information that I'm collecting. So here I made a chart, and the data here is made up just for this presentation's example. But I might want to try and figure out if there are any gaps or areas for improvements in the way that we are announcing an opportunity based on the outcome. I can see that in green here, the column that is furthest to the right under each of these sections, those are my ‘not announced’. Usually, that's if we didn't identify an opportunity in time to send an announcement out to campus about it. I can see that those are never competitive. That might inform what I look for next year and how early I try and find the opportunities to announce them. This is the type of thing that at the end of the fiscal year, I'm spending some time trying to find those to help me improve my process.

Next slide, please. Limited submissions, I believe, are a really unique use case in InfoReady that can become very time consuming if they're not approached with some strategy. But InfoReady allows for the flexibility and customization that relieves that administrative burden of having to organize limited submissions really significantly. It's worth the time upfront to set up a process that will work best for your institution, and I really recommend taking advantage of your templates and trying to make them fit a variety of situations and outcomes. I've found that working step by step is the most time effective way to use this tool, and I strongly recommend thinking through what you need when to try and save yourself time overall. And plan your templates with your data in mind. If there is a characteristic about an opportunity that you're going to want to know later, make sure your form is capturing it for yourself, because as much as I say, I'll remember that detail next year, I'm not going to remember that detail next year when I'm running 158 competitions, or even if I was just running five, I probably wouldn't remember it next year.

That is my last slide, I believe. And so I'm happy to answer questions or help think through things.

Carlos: Thanks so much, Tanya, for going through your process. Lots of information there. Thanks for taking a step-by-step approach to help people understand how you're managing limited submissions from beginning to end. So often people just have the high-level concepts, and they don't think about the intricate needs and logistical portions of managing all those. Especially, I mean, you emphasize the point that you had over 150 that you're managing. You're going to forget things.

Tanya: It adds up.

Q&A Session

Carlos: It adds up. So having a process, establishing a process that you can rely on is really important. Now, during your presentation, we got lots of questions. So let's jump in to Q&A. Sounds good. First question, are any of those invisible fields that you're utilizing drop-down fields?

Tanya: They are not. It would be really great if that was a feature. Maybe I will submit that as a feature request. To my knowledge, those... What are they called? The additional fields in the details page can't be set up as drop-downs. What I've done is... So one of my invisible fields is type of sponsor. Then I have parentheses after that, and I've added 'what are my options?' So I have federal, foundation, corporate, state listed there. And then I use that exact phrasing every time, because I want to be able to filter by it at the end of the year in some spreadsheet. And if it's not the exact same word or phrase, it's not going to let me filter by it. So drop-downs would be one way to do that. My workaround has just been to list the options there for myself so that I use the same wording every time, or if my colleague is doing one when I'm out, they're using the same phrasing every time that I am.

Carlos: No, that's a good idea. Can I ask you a question? Follow-up question? This is just coming from me. The category option on the details page, have you ever thought about having it be limited to missions, hyphen, federal, limited to mission, hyphen, whatever it might be?

Tanya: That is a great question, and I'm looking at my other screen so I can pull up what I have there now. We use category right now as an external status. Our category says open, funding opportunity, opportunity, first come, first serve, opportunity, closed, non-limited. So we use it for other information. I could make that a really long drop down and do closed, funding opportunity, federal. So maybe that's something I'll play around with. But we do use that category drop down to gather information that I will want to track as well.

Carlos: Got it. So you would multiply that by four.

Tanya: Right.

Carlos: But I have seen some institutions where they'll use limited submission, hyphen, whatever the funding agency or funding source is. Okay, more questions. We have several questions here. So you spoke about being able to submit or edit it reviews. Have you ever edited an application after it was submitted or even after it was awarded?

Tanya: I write applications really frequently after they're submitted. Sometimes a reviewer might flag an issue about an application that I didn't catch in my preliminary review. So I've edited my applications at all stages. And very recently, I played around with, I think it's a new feature, but you can set your requirements to be blind to either your reviewers or your applicants. Similar to how I've set up my Invisible fields on my details page. I've started playing around with Invisible fields on the application itself because that data will pull out in a unique way as well. So something I like to know is, who are my runner-ups that were really good, but they were just slightly beat out by another applicant? Because next year, maybe I'll send them an email to make sure they've seen that the opportunity is posted, because they were really close to being selected for nomination, right? And I don't necessarily want them to know they were the runner up, but I want to be able to capture that and remember it. So I've been playing around with editing the application after a decision has been made with that information and then making it blind to my applicants.

Carlos: That's a good idea. Innovative way to make sure you're tracking good research and being able to match it up to future opportunities. Related to application forms, to proposals. We've got a question. You mentioned that you collect multiple files? Yes. The question here is, have you tried requiring applicants to submit the project summary CV and budget in one PDF so that you don't need to combine them? If so, why are you going with your current method?

Tanya: We do our CVs. When we ask for a CV, we ask for CVs for the PI and any key collaborators. For that, we ask for a single combined a designed PDF to be uploaded. But we don't ask for a single package because InfoReady can do that really quickly. Let me make sure I'm telling you the right way to do it. If I am in an opportunity on the application grid, I can check off an opportunity and go to my batch actions and say, Download selected. Then I can say, specific application attachments, and then I can check off my CV, my budget, and my summary, and then I can say, Download and single PDF. So since InfoReady can do that for me quickly if I need it, I try and make my process as simple for my applicants as possible. And I have gotten emails from some applicants with all of their CVs, and they say, 'Hey, I couldn't figure out how to combine them, or for some reason today, preview who didn't want to allow me to combine this because there's something wonky in the file.' I anticipate that if I ask for one combined upload, I might have more issues from my applicant's perspective, and I want it to be quick and simple as long as I have the ability to download that out.

We ask for combined CV because I can't have 10 file uploads. If there's 10 key collaborators on a proposal, I can't figure out a way in my head to make that simple and info-ready for there to be 10 separate spots for each individual to upload their CV. So I do ask for a combined CV because I don't know how that would work to allow people to submit each CV separately. There probably is a smart way to do it.

Carlos: I've got ideas. You could use repeatable section. It's a new piece, the informed designer, and people could click add another. But anyway, we're not going to go into the details of using that because we have lots of questions. Here's another good one. What if PI's miss the NOI step? What do you do? What's the It's a bit contingency.

Tanya: So we try to be relatively flexible when we can be. So we have some policies about late submissions, and generally, Normally, we say, reach out to us if you've missed a notice of intent, but we can't promise that we will be able to accept a late notice of intent. So I try to be flexible, but we can't always be, right? And it really depends on how early they reach out.

So one thing we do is our campus deadlines are always at noon Pacific time, but I set the system up to actually close at midnight, because half the time people see 12: 00 PM and they think that's midnight. They just haven't really thought through that that's noon. So I add in some buffer space for those late submissions, or we get the, I submitted it at 11:59:59, and it took enough time that

that bumped me into after the deadline, and now the system won't accept it. So I add in buffer time to that, when is the system actually closing. But I still tell the applicants that the deadline is Noon. The reason why we can't promise that we can accept late notices of intent is that if I'm in a case where I only received one notice of intent, typically by the next day, I've approved that applicant to submit to the sponsor, because if we don't exceed the solicitations limit, we're not going to require that next phase.

But if they reach out right away, usually we can say, Okay, we can accept it. If we received four notices of intent and we are only allowed to submit one, so we're waiting to receive campus applications. We try to give a couple days buffer to accept a late notice of intent. It's a little wishy-washy, and I wish we could be a little bit more strict on our policies. I am a rule-follower and a deadlines person. I never miss a deadline, usually. I think I got my slides to you late, however. So to do as I say, not as I do, but usually I don't miss a deadline. I have a hard time accepting late notices of intent, but sometimes someone just didn't learn about something. We try and be flexible where we can, but if we've already moved on to the next stage, the applications are already with reviewers or we've already approved someone, there's nothing we can do if we've already moved on.

Carlos: Great. Thank you. I'll also add that in the system with the letter of intent functionality, there's built-in phase one and then converting to phase two. If you have people who were unable to submit their letter of intent, notice of intent. The system has a feature where you can allow additional applicants to submit to phase 2 who did not submit to phase 1. There's the option built in there to give you the flexibility to open it up to more people as well. I know everyone has a slightly different process, just putting that out there for people. We've got another question. This one, it goes to your experience implementing InfoReady at multiple institutions. Do you have any recommendations for, one, convincing others on campus to utilize InfoReady and two, for transitioning limited submissions from an old platform to InfoReady.

Tanya: Yeah. So for the first part of that question, convincing others to use InfoReady, I'm curious if you mean to convince other administrators to use InfoReady to administer their competitions, or just getting that applicant and reviewer buy-in to actually use the system that you are launching.

For the buy-in side of that question for applicants and reviewers, my applicants love InfoReady. It's so much easier for them to just follow a link, use their net ID, their institutional login, and submit something. So buy in from applicants, easy. I just said, ‘Here's the new process. Here's the link to submit.’ We did have a phase, because we email out campus, all of our limited submissions competitions, we did have a phase when we were implementing InfoReady, probably the first few months, where we gave additional instructions for how to log in, that you can use your net ID once you follow the link to log in. And then once we've been using InfoReady for a while, we've taken out those additional instructions. So it's just being aware that you might have to tell people what to do as you're transitioning.

Reviewer is the same thing. I just make sure that when I'm emailing them, I'm telling them, Hey, we're using this new platform. It should be easy. You'll use your Calnet ID or your institutional login, but let me know if you have any issues. We haven't had any pushback from the users.

If you're asking about getting other administrators on campus, I've had mixed success with that. At my prior institution, we did better than what we're doing here at Berkeley. We ended up with, by the time I was leaving, I think we had four microsites, and they might even have another one now. We had 20 something administrators. Once people saw how quick and efficient it was for my processes, they wanted to use it. So part of that is just, use it, tell people you're using it, and they will see how quick and easy it is, and we'll start inquiring about it, maybe have a policy on your website about how they can become administrators. At Berkeley, we haven't had any other bites yet, although there is another office currently that's talking with us about wanting to use InfoReady. So It's really what your campus needs are and just making sure people know it's a tool and that they can get access to it if they'd like to use it.

Carlos: Thanks, Tanya. We've got time for one more question We have several questions we won't be able to get to because we have three minutes left, but one more question. This one relates to reviewers. Do you have a select group of individuals that are part of a reviewer pool? Do you require the reviewer to sign any document, conflict of interest, check the box for terms and conditions, anything like So we use ad hoc reviewers for all of our competitions, and this is part of why I wanted to switch to a notice of intent two-step process.

Tanya: Based on the disciplines of the notices of intent, that will inform what disciplines I'm going to need. And so we do an ad hoc system because at my prior institution, we had a reviewer pool, and you don't always have enough of the appropriate expertise for a given competition. So I use an ad hoc system. I'm just searching for faculty on campus that have the right expertise and emailing them to see if they're willing to help us out. And luckily, my colleagues are really nice and collegial, and a lot of the times are willing to do that service for us. And I have already gotten the second part of that question, Carlos. It was, are we using ad hoc and?

Carlos: Oh, yes. The second part of that is whether they're having to... How are you handing in any conflict of interest?

Tanya: So they don't have to sign anything, but when they are sending in their notices, we use the checkbox feature. And so we ask them to check a box that says they have let us know of any potential conflicts that they promise to keep the information confidential. They have to click that box in order to be able to submit to us. And then there's instructions there to email us if they haven't yet disclosed any potential conflicts. I forget what those checkboxes are called, Carlos.

Carlos: Acknowledgment statement.

Tanya: The acknowledgement statement. Yes.

Carlos: Well, we're at the end of our time here. I have some things to show on screen because we've got some upcoming webinars. Before I talk about these, Tanya, thanks for answering so many questions. Very helpful giving additional details there.