

Beaver Works Fellowships Update

March 10, 2021

Fellowships Task Force Work - Past, Present, and Future

- **Membership and representation**
- **Methodologies and processes**
- **Recommendations and implementation status**
- **Stakeholder communication and feedback**
- **Next Steps**
- **Feedback and Questions**

Task Force Members

- Melora Park, Pre-award support - College of Forestry
- Liz Etherington, Pre-award support - College of Agricultural Sciences
- Nick Fleury, Financial Support Director - Graduate School
- Sue Hall/Emily Ferrin - Payroll
- Greg Balck/Benjamin Garcia - Student Accounts
- Heidi Hammond, Grant and Contract Administrator - OSRAA
- Gretchen Dursch, Research Program Coordinator, College of Public Health and Human Sciences
- Yanli Zhang, Finance and Accounting Manager - AMBC
- Dana Ainsworth, Finance Coordinator - BEBC
- Perry Hystad, Faculty Member - College of Public Health and Human Sciences
- Kerry McPhail, Faculty Member/Graduate Program Coordinator - College of Pharmacy
- Cory Vieira, Employee & Labor Relations Officer - Office of Human Resources
- Sarah Haluzak, Administrative Manager - Food Science and Technology
- Lisa Silbernagel, Finance and Accounting Manager - HSBC

Member Representation

- Representation from all units which currently have a part in the process and/or which are impacted when issues arise
 - * OSRAA
 - * Graduate School
 - * Human Resources
 - * Appointing Units
 - * Payroll
 - * Student Accounts
 - * College pre-award staff
 - * Business Centers
 - * College Fellowship/Graduate Program Coordinators
 - * Faculty Members
- 3 Business Centers represented (AMBC, BEBC, HSBC)
- 4 central offices represented (Payroll/student accounts, OSRAA, OHR, Grad School)
- 4 Colleges represented (Forestry, Public Health and Human Sciences, Pharmacy, and Agricultural Sciences)
- Intentional in task force composition - two fold purpose:
 - * Very well rounded - significant experience (though often singly focused experience)
 - * Eye to the future - hoping to retain for implementation phase

Methodologies and Processes

- The task force met bi-weekly over the months of June - October 2020
- Started with foundational concepts - establish common understandings on:
 - * What is a fellowship?
 - * How is a fellowship different from a GA and how and by whom is that determined?
 - * How is the student/faculty mentor/appointing unit potentially impacted differently?
- Case studies from actual OSU examples of particularly problematic situations - specific, consistent set of analysis questions used on each:
 - * How did it happen? What were the root causes?
 - * What was the impact to the student/mentor/appointing unit - and why?
 - * How could it have been prevented?
 - * What recommendations can we make to address this in the future?
- Recommendations to Heidi Sann - October 2020

Recommendation 1

Designate a central communications point and process/policy “owner”

- Address the current lack of coordination/ownership/communication
- Previously, no single person/office held overall lead role - often causing confusion, conflicting understandings/directions, and students/unit staff being passed from office to office to get answers
- Central point of contact and policy/process owner should be established as a Graduate School role
- While there should still be collaboration with other units, the Graduate School will serve as policy owner, primary point of contact for communications, central resource for FAQs, process instruction, etc.
- This recommendation is currently being implemented after consultation with Graduate School leadership - GS role being expanded to include greater input and visibility at the pre-award stage

Recommendation 2

System/organizational improvements in campus education, training, resource accessibility, and process efficiencies

- Education/training to be developed and offered by subject matter experts
- Tools/resources to be developed and made available to campus community - decision trees, flow chart (**completed**), more extensive and better linked policy/procedure information, quick reference tutorial (**completed**),
- Clearer, more broadly communicated roles and responsibilities related to policy and process
- Shared “fellowships@oregonstate.edu” email address (**completed**) and establishment of an advisory committee
- Revisions to current **graduate fellowship appointment form** - with instructions and change to a DocuSign template (pre-determined routing) (**in process**)

Stakeholder Communication & Feedback

- Presentations to solicit feedback:
 - * Grant Administrators' Meeting - 12/3/20
 - * CARE Team (pre-award support in colleges/BCs) - 1/12/21
 - * OSRAA (weekly update for staff) - 1/12/21
 - * Business Process Review Workgroup - 1/26/21
 - * Controller's Office/OSRAA/Graduate School leadership - 2/19/21
 - * Beaver Works - 3/11/21
 - * OSRAA Outreach meeting - 3/18/21

- Feedback received thus far reinforced the need for:
 - * Communication and Training
 - * Consistent and easily accessible resources
 - * Process transparency and designated ownership

Next Steps

- Feedback from this group
- Announce expanded Graduate School role - starting with OSRAA outreach meeting on 3/18/21
- Continue with tool/resource development and dissemination
 - * Complete and upload instructions and revisions to graduate fellowship appointment form
 - * Decision trees
 - * FAQs - consistent and linked from multiple relevant sources
 - * Develop training resources and establish mechanisms for dissemination
 - * Establish advisory committee
- Engage with stakeholders for website content development for all of the above - as well as resources already developed
- Continue communication to campus as resources/recommendations are developed and implemented

Feedback and Questions?