



DELOITTE HIGHER EDUCATION

# Client Success Story

## Right-sizing a R1 Research Enterprise

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*The Deloitte team conducted a complex organization and workload assessment to support a large R1 institutions research capabilities as it continues to grow.*



## Background

Deloitte's Research Administration Capability team led a comprehensive research enterprise assessment of a large public University's operations with the intent of supporting the University's further advancement into the ranks of the world's top-tier research institutions. With soundly over \$1 billion in total research funding in its most recent fiscal year, the University sought Deloitte's experience to effectively organize and position its research administration enterprise for service excellence, compliance, and growth. The team led an engagement to identify gaps and weaknesses in the full research administration lifecycle and develop an implementation plan for improvement to align the University's infrastructure with the rapidly evolving needs of a global research university. As a result of the positive outcomes of the engagement, the University worked with Deloitte to conduct a second phase of work which included an in-depth workload analysis to identify staffing needs and a gap analysis of the current-versus-desirable workforce staffing levels for optimal operation.



## Process

Over the course of the two engagements, the Deloitte teams conducted over 100 group and individual interviews, conducted and analyzed extensive questionnaires, and performed

comprehensive benchmarking across current-peer and peer-aspirational institutions to inform the client recommendations. The team's research administration subject matter experts (SMEs) provided industry knowledge and best practices throughout project execution and formulation of the team's final recommendations. Deloitte modeled multiple functional configurations for the University, and from these models recommended a structure that resonated with both the University's current state and its anticipated rapid continued growth.

### Phase 1

In phase 1 of our engagement, Deloitte took a holistic assessment of research administration functions at the institution and conducted peer benchmarking to provide best practice related to organizational structure, business processes / policies, training, and culture. Throughout the scope of work, the team worked collaboratively with executive leaders across the institution to align assessment findings and recommendations with institutional and research enterprise priorities and visions for the future. At the end of Phase 1, Deloitte delivered a detailed roadmap for the institution to implement recommendations including estimated resources, as well as a change management strategy to support the overall culture change needed to advance improvements to research administration.



## Process (cont'd)

### Phase 2

During Phase 2 of the engagement, the Deloitte team analyzed staffing levels and vacancies related to current workloads across key research offices, including the Office of Sponsored Programs, post-award accounting, compliance offices (i.e., IACUC, IBC, IRB, RCR, Export Control, and COI), local departments, & training/education offices. To determine optimal staffing levels and FTE workloads, Deloitte gathered peer data and establish target metrics per FTE for each research admin role. For example, Deloitte considered total number of proposals, contracts, account set ups, and total annual research expenditures to determine average workloads for pre-award and post-award staff. Deloitte SMEs accounted for influential factors such as transaction complexity when determining optimal structural configuration and FTE workload. The Deloitte team worked to understand the current relationship of each stakeholder to one another, and evaluated where additional resources were required to enhance subject matter knowledge, communication and collaboration in the future state. At the conclusion of the analysis, Deloitte provided multiple recommendations to ease pain points, enhance training and mentorship, improve process documentation, and align job characteristics for individual positions.



## Impact

Deloitte conducted over 100 interviews with executive leaders, administrators, and faculty across the institution to identify opportunities for improvement across the research administration enterprise. With these insights, Deloitte developed a prioritized implementation plan for restructured

organizational structure, redefined business processes and policies, staff training, and improving work culture across the research enterprise. The team developed and adjusted job descriptions to appropriately communicate responsibilities and skillsets and suggest competitive salaries for recruitment and retention of candidates from the current market. The team also revamped performance evaluation for employees, focusing on growth and upward career mobility. The developed recommendations and supporting deliverables were clear and actionable, allowing the client to implement the most impactful initiatives and improve the research enterprise so the institute effectively support its research capabilities as it continues to grow.

For more information,  
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