

Date: December 18, 2020  
 To: Deans  
 From: Dr. Christopher J. Keane, Vice President for Research *Chris J Keane*  
 Subject: New Model for Reporting Sponsored Project Credit Metrics at WSU

I am writing to describe changes to the WSU sponsored project credit reporting process, and provide guidance regarding implementation of this new process. The changes discussed below are essentially those described by Dan Nordquist and me to the Deans Council on August 31, 2020.

Taking advantage of the expanded accounting capabilities available within Workday, and based on input from faculty and administrators across the WSU system, we have established a new credit reporting process. The process includes three “views” of credit:

1. The proposal/award as viewed by the sponsor – traditionally the Fiscal Responsible Unit (FRU) at WSU
2. The award “as spent”- that is, an expenditures view. Please note that accurate reporting requires each investigator obtaining their own “grant award line” (the Workday term for “account”) to manage, with the lead investigator having access to award lines to monitor the project. This capability, not available in the current WSU system, will be available via Workday
3. The proposal/award as seen from the perspective of intellectual contribution, including measures of collaboration and project leadership
  - 3a. Collaboration with others
  - 3b. Average Credit % (as provided on the eREX Form)

Note that, as suggested by several faculty, we have included reporting view 3 above. This new look at intellectual credit will provide an additional look at productivity – namely, the average intellectual credit percent of proposals and awards faculty lead or are involved with.

These changes will enable more accurate reporting of financial and intellectual credit, particularly for sponsored projects involving multiple colleges and campuses. The table below summarizes the changes:

Report View	Change
View 1: Award as viewed by Sponsor	No change.
View 2: Expenditures, as reported in Workday	Workday has provided WSU enhanced visibility and an adequate amount of usable grant award lines (accounts), for a more accurate account of expenditures on a ‘per Investigator’ basis.
View 3: Via credit information, as provided on the eREX Form in MyResearch	Credit reporting to be expanded to include more than just academic departments, and two newly created metrics (3a & 3b).

This new model provides WSU faculty, staff, and leadership with better reporting options in MyResearch and in the Academic Profiles of Institutional Research (IR). We envision similar Centers/Institutes Profiles being created as well.

To reflect these changes, the Office of Research (OR) is currently working on updating the eREX Form and ORSO Guideline #33. This Guideline and the new eREX form will be released in the first few months of 2021. The new credit reporting process will be implemented following release of these items. OR will work with IR to incorporate the appropriate data into their Academic Profiles following release of the Guideline.

To support implementation of this new process, I ask that your staff work with Dan Nordquist and OR staff to identify those investigators requiring group Workday grant award lines. Proper identification of individuals requiring these lines is essential to accurate reporting. I also ask you share this announcement with faculty and staff in your colleges as appropriate.

I'd like to thank the numerous individuals who have contributed to this effort, including the Associate Deans for Research, the Vice Chancellors for Research, the IR, and faculty/leadership involved in formulating the changes described above. I'd also like to particularly thank Drs. Amy Roth-McDuffie, Michael Wolcott, Paul Whitney, and Hans Van Dongen for their dedicated work on this important subject.

Thank you for your support as we implement these changes. Please let Dan Nordquist or me know if you have questions or require additional information.

Cc:

Elizabeth Chilton, Provost and Executive Vice President  
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Daryll DeWald, Vice President for Health Sciences and Chancellor, WSU Spokane  
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