Supporting Project Management at King’s Worktribe and Pure case study
Initiating a project

• Academic staff has an idea for a project

• Finding an external organization willing to support projects in this area with funding
  • Personal knowledge
  • Funding Opportunities discovery tool
  • In-house Research Development team

• Beginning a proposal
  • Scientific/narrative – “why and what”
  • Costing – “how and how much”
Building a proposal

• Evidence of success and previous work
  • Prior funding in this area
  • Publication record
  • Pure records and reports

• Breakdown of Full Economic Cost (FEC)
  • Salary costs for academic investigators
  • New staff/students to carry out the research
  • Equipment and consumables
  • Travel and dissemination
  • “Overheads” – what infrastructure and non-academic support is provided by the institution
Costing a project

- Worktribe project costing tool
  - Person and Organization data (via HR system)
  - Salary information (via HR system)
  - Budget breakdown
  - Funder schemes and rules
  - Various financial rates
    - Inflation
    - VAT rates
    - Pension
    - Exchange rates
    - Etc.
Approval workflow

• Managed within Worktribe
• Faculty-defined rules
  • Head of Department/School/Faculty
  • Local admin
• Parallel workflow for multi-faculty projects
• Escalation rules
  • Value of project
  • Funder
  • Etc.
• Allows Faculties to view full portfolio of bids
  • Duplicate projects
  • Multiple bids to limited scheme
  • Space planning
• Final sign-off by Research Management
Success – funded projects

- Contract negotiation
- Creation of account and budget – integration with Finance system
- Publicity
  - Display on public website/portal – integration with Pure
- Post-award functionality
  - Applying for supplements and project extensions
  - Budget management and virements
Research Outputs

• Integration between Worktribe and Pure allows linking of projects to outputs
  • Researcher profiles
  • REF
  • Reporting to funders – e.g. Researchfish

• Linking of projects to societal impact of research
Metadata – how it all hangs together!

- **HR – Worktribe – Pure**
  - Person IDs
  - Internal Organization IDs

- **Finance – Worktribe – Pure**
  - External Organization IDs – funders and partners
  - Project IDs
  - Budget category IDs
  - Output IDs

- **HR – Finance also in place**
Thank you

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