The Cayuse Customer Success Plan for:
California State University San Marcos
Sponsored Projects
ABC University is the fastest-growing institution on the West Coast, and is opening a new Health Science Center in October 2019. Innovation is this year’s campus theme.

### Objectives
- Reduce administrative burden for faculty so they can spend more time on research and teaching
- Retire an aging IRB Microsoft Access database and server
- Reduce paper forms by moving to electronic approval systems wherever possible
- Add Cayuse IRB to ABC’s existing Cayuse 424 and SP modules

### Key Challenges
- IRB Chair is retiring in the Spring (replacement TBD)
- IRB Analyst is the only IRB Office employee
- Database server has 6 months left before it stops working

### Key Benefits
- End double data entry for IRB Analyst
- Improve IRB Office - PI relations
- Speed up IRB approvals
- Handle Increased human subjects study volume from new HSC

### Milestones, Actions & Dates
- **4/1/19**: IRB Implementation Kickoff
- **6/1/19**: CSM check-in
- **7/10/19**: IRB implementation ends
- **8/10/19**: CSM 30-day check-in
- **9/7/19**: IRB rollout

### Success Criteria
- Paper/Word forms no longer accepted for IRB submissions
- IRB Microsoft Access database retired
- IRB Office using Cayuse IRB for all IRB submissions

### Measure of Success
- IRB approval time = 35% faster
- IRB submissions are up 20% > LY
- PI feedback has been positive
- IRB office paper costs are down 25%
- IRB Office IT costs are down 20%
### Customer Highlights

Building on an innovative 30-year history, California State University San Marcos is a forward-focused institution, dedicated to preparing future leaders, building great communities and solving critical issues.

### Objectives

- Better reporting and visibility into data
- Create new efficiencies (including adding PI bio's)
- Proposal and award routing!
- Transparency: easier for everyone to see how a project progresses
- Task management

### Key Challenges

- COVID pandemic
- Change management (habits, etc.)

### Key Benefits

- Ease of use
- Better reporting
- See objectives
- Let dept admins + PI's see more aspects of their own projects (self-serve)
- Less emails

### Milestones, Actions & Dates

- Annual single audit in August
- Campus demo/previews in March; email updates to campus
- Target implementation wrap-up: 6/14/21
- Target on-campus rollout: July or August (pilot groups)

### Success Criteria

- Currently using Adobe sign for proposal--retire that method.
- Retire the proposal tracking sheet
- Improved proposals and award reporting

### Measure of Success

- Positive faculty and campus feedback
- Metrics: timing of proposal approvals and award setup
- TBD

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Last updated: 3/3/21