

# ERS Communications and Training Strategy

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## ERS Communications and Training Strategy

### Introduction

The University of California receives substantial funding for contracts and grants sponsored by the federal government. To meet its fiduciary responsibility, all campuses throughout the system wide enterprise must comply with federal grant management policy regarding effort reporting.

Since 1982 the University has relied on the Personnel Activity Report (PAR) to satisfy the effort reporting requirement. This paper-based, manually-intensive system has grown outdated and cumbersome as technology has changed and compliance standards have intensified. Recently, the University Controllers determined the University would be at risk if it didn't enhance its compliance capability through the deployment of automated tools and processes.

In 2003 five campuses (Berkeley, Davis, Los Angeles, San Diego and San Francisco) opted to fund a UCOP development effort to design, build and roll-out a fully automated Effort Reporting System (ERS) which will replace the current paper-based PAR system. Since that time business requirements have been documented, a prototype module has been developed and pilot activities have been scheduled for October 2005. The production release of ERS to campuses is scheduled for February, 2006.

One activity in the development of ERS involves the design, development and delivery of communications and training products that will support campus implementation of the new system. Target audiences and associated communication and training needs were identified by the ERS Management Group (see Attachment 1 for details) in March, 2005. The objective – articulated by the ERS Management Group – is to provide a product suite of communications and training to all campuses that they in turn can modify and embellish for their own purposes.

**This document recommends a strategy to provide communications and training support to campuses as they prepare for and launch their ERS initiative.**

### I. Analysis of Communication Needs

Campuses will need to engage in various activities over time in order to implement ERS. Stakeholders will need to get buy-in from campus leadership and administrators and then manage a process that will lead to the eventual adoption and implementation of the new automated system.

To support campuses in their efforts to implement ERS a common suite of communications products needs to be developed and delivered that:

- Supports efforts to get buy-in of campus leadership.
- Familiarizes campus audiences with effort reporting requirements.
- Orients audiences to system features and capabilities.
- Provides guidelines for implementation planning.
- Explains how reporting effort using automated tools and processes differs from current practices.
- Are generic enough to fit generic campus needs but can be easily customized to suit individual campus requirements.

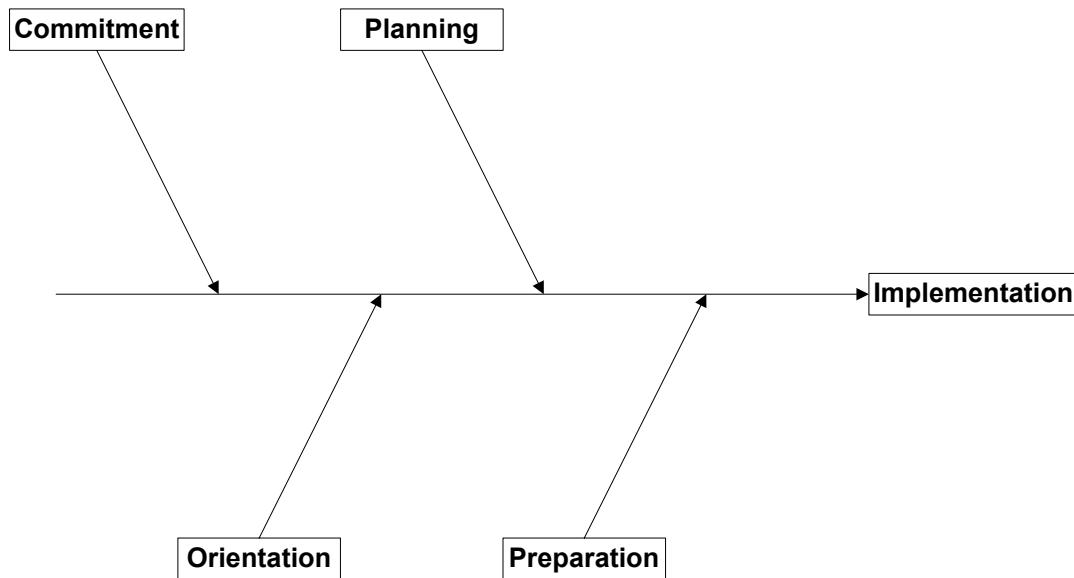
## **II. Proposed Communications Strategy**

The proposed Communications Strategy has been designed to take into account campus needs to communicate on a regular and on-going basis with campus leadership, faculty, and staff during the planning and preparation phases of going live on ERS.

### **A. Communication Phases, Objectives and Content**

In order to provide campuses with the communications support they require in the appropriate sequence and in alignment with the timeline for roll-out of ERS, communications requirements have been divided into five phases. Those phases are identified in Table I: ERS Communications Phases.

**Table I: ERS Communication Phases**



The Communication Objectives for each phase have been defined as follows:

- **Commitment Phase:** get buy-in from campus leadership to support Effort Reporting via ERS.
- **Orientation Phase:** orient campus leadership and administrators to ERS Project Initiative, ERS Features and Benefits, Project Timeline, etc.
- **Planning Phase:** support administrators and campus work groups planning for implementation of ERS
- **Preparation Phase:** support administrators and campus work groups preparing to implement ERS.
- **Implementation Phase:** provide campuses with release instructions and training products.

Target audiences and communications deliverables have been identified for each Communications Phase. For details, see Table II: ERS Communications Strategy – Phased Objectives and Deliverables for Target Audiences on the next page.

Table II: ERS Communications Strategy  
 Phased Objectives and Deliverables for Target Audiences

	Commitment	Orientation	Planning	Preparation	Implementation
COMMUNICATION OBJECTIVES	Get buy-in from campus leadership to support Effort Reporting via the new ERS	Orient campus leadership and administrators to ERS Project Initiative, ERS Features and Benefits, Project Timeline, etc.	Support Administrators and Campus Work Group Plan for Implementation of ERS	Support Administrators and Campus Work Groups Prepare to Implement ERS	Provide Campuses with Release Instructions and Training Products
AUDIENCES	Executive Vice Chancellors Vice Chancellors of Research Academic Council Deans Chairs Academic Senate	Executive Vice Chancellors Vice Chancellors of Research Academic Council Deans Chairs Academic Senate Principle Investigators Faculty Key Academic Personnel Campus Work Groups Management Services' Officers Grant Administrators	Campus Work Groups Management Services' Officers Grant Administrators	Campus Work Groups Management Services' Officers Grant Administrators Departmental Staff	Campus Work Groups Management Services' Officers Grant Administrators Research Administration Payroll Office Staff Department Security Administrators
COMMUNICATION DELIVERABLES	Kick-Off Presentation: PPT Master Slide Show  Memo to Campus Leadership	Executive Presentation (culled from Master Slide Show)  Guidelines for Performing ERS Demo  Memo to Handout	Orientation to ERS  Planning Tools	Detailed Implementation Guidelines	Release Instructions  Training Products

## B. Messages for Phased Communications

Table III below, shows proposed messages to be delivered during each of the ERS communication phases. Phase objectives and audiences are repeated from the previous chart to make it easier for the reader to assess whether or not the message is appropriate and complete. These messages are comprehensive but by no means complete and as development proceeds, it is entirely possible that there will be additions and changes.

**Table III: Message Content for Phased Communications**

<b>Communication Phase:</b>	<b>Objective:</b>	<b>Audience(s):</b>	<b>Message(s):</b>
<b>Commitment Phase</b>	Get buy-in from campus leadership to support Effort Reporting via ERS	<ul style="list-style-type: none"> <li>• Executive Vice Chancellors</li> <li>• Vice Chancellors of Research</li> <li>• Academic Council</li> <li>• Deans</li> <li>• Chairs</li> <li>• Academic Senate</li> </ul>	<ul style="list-style-type: none"> <li>• What are the federal requirements for reporting effort?</li> <li>• What are the consequences of incomplete or improper effort reporting?</li> <li>• The real and far-reaching costs of non-compliance.</li> <li>• What are the limitations of the current PAR system?</li> <li>• What is the UC Effort Reporting Initiative?</li> <li>• What are the features and benefits of the new Effort Reporting System (ERS)?</li> <li>• What processing changes can UC expect?</li> <li>• What is the project status?</li> </ul>
<b>Orientation Phase</b>	Orient campus leadership and administrators to ERS Project Initiative, ERS Features and	<ul style="list-style-type: none"> <li>• Executive Vice Chancellors</li> <li>• Vice Chancellors of Research</li> <li>• Academic Council</li> </ul>	<ul style="list-style-type: none"> <li>• What is effort reporting?</li> <li>• What policies drive effort reporting?</li> <li>• Why do we need to do effort reporting?</li> <li>• What is the Effort Reporting System (ERS)?</li> <li>• What are the implications to workload for Faculty</li> </ul>

Communication Phase:	Objective:	Audience(s):	Message(s):
	Benefits, Project Timeline, etc.	<ul style="list-style-type: none"> <li>• Deans</li> <li>• Chairs</li> <li>• Academic Senate</li> <li>• Principle Investigators</li> <li>• Faculty</li> <li>• Key Academic Personnel</li> <li>• Campus Work Groups</li> <li>• Management Services' Officers</li> <li>• Grant Administrators</li> </ul>	<p>and Department Staff?</p> <ul style="list-style-type: none"> <li>• What is the timeframe for beginning to use ERS?</li> <li>• Logistical information such as: Campus work groups will be working with your MSO/CAO/CFOs to develop an implementation strategy for your department. Someone will be contacting you to schedule session(s) during which you can see a system demonstration, ask questions about using ERS and learn more about the requirements for certifying effort.</li> </ul>
<b>Planning Phase</b>	Support Administrators and Campus Work Groups Plan for Implementation of ERS	<ul style="list-style-type: none"> <li>• Campus Work Groups</li> <li>• Management Services' Officers</li> <li>• Grant Administrators</li> </ul>	<ul style="list-style-type: none"> <li>• What is involved in implementing ERS?</li> <li>• What should I be thinking about in terms of planning, staffing, processes, timing, etc.?</li> <li>• How will the system be used by the campus? In my department?</li> <li>• What changes can I expect to see in the way I now handle effort reporting?</li> </ul>
<b>Preparation Phase</b>	Support Administrators and Campus Work Groups Prepare to Implement ERS	<ul style="list-style-type: none"> <li>• Campus Work Groups</li> <li>• Management Services' Officers</li> <li>• Grant Administrators</li> <li>• Departmental Staff</li> </ul>	<ul style="list-style-type: none"> <li>• What the project schedule means to me.</li> <li>• With whom do I need to communicate?</li> <li>• Identifying users who need to be trained.</li> <li>• Transition issues: moving from paper to electronic effort report processing</li> <li>• Timing</li> <li>• When do I need to communicate with users?</li> <li>• When do my employees need to be trained?</li> </ul>



Communication Phase:	Objective:	Audience(s):	Message(s):
			<ul style="list-style-type: none"> <li>• When does system access need to be set up?</li> <li>• Opportunities for streamlining internal processes.</li> <li>• Understanding ERS roles (include assigning people to roles).</li> <li>• Understanding the difference between approving roles and setting them up in the system.</li> </ul>
		<ul style="list-style-type: none"> <li>• Research Administration (Pre/Post Central Units)</li> </ul>	<ul style="list-style-type: none"> <li>• Transition Issues</li> <li>• What ERS means to me</li> </ul>
<b>Implementation Phase</b>	Provide campuses with release instructions and training products	<ul style="list-style-type: none"> <li>• Campus Work Groups</li> <li>• Management Services' Officers</li> <li>• Grant Administrators</li> <li>• Research Administration</li> <li>• Payroll Office Staff</li> <li>• Department Security Administrators</li> </ul>	<ul style="list-style-type: none"> <li>• Release instructions</li> <li>• Training Products</li> </ul>

### C. Timing of Phased Communications

Proposed timing of the phased release of communication materials is detailed in the Gantt chart below. These timeframes are estimates only and will be modified to fit campus needs as they are further refined and articulated.

ID	Communication Phases	Start	Finish	Q3 05			Q4 05			Q1 06	
				Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb
1	Commitment Phase	6/8/2005	6/8/2005								
2	Orientation Phase	6/8/2005	7/29/2005								
3	Planning Phase	8/1/2005	9/2/2005								
4	Preparation Phase	9/5/2005	10/7/2005								
5	Implementation Phase	11/1/2005	1/2/2006								

### D. Product Delivery

All communication products will be developed and then put up on the UCOP ERS website. Once on the website, communications products will be downloadable from the following link:

[www.ucop.edu/sysdev1/ers/](http://www.ucop.edu/sysdev1/ers/)

Communication products will be in variety of formats, depending on the nature of the communication. Formats will include: Word, PowerPoint and PDF.

Members of the ERS Management Group and the ERS Requirements Group – and any campus work groups who make a request – will be notified when products are available.

Products will be introduced during regularly scheduled Management Group and Requirements Group meetings whenever possible. All products will be reviewed and approved by the UCOP/ERS project management, the ERS Management Group and the ERS Requirements Group, where appropriate.

### III. Analysis of Training Needs

In March, 2005 the ERS Management Group identified target audiences who were responsible for effort reporting and therefore in need of communications and training during the roll-out and implementation of ERS. Audiences who were targeted specifically for training include: Principal Investigators (PIs), other Faculty and Key Academic Personnel, Department Research Administrators, ERS Coordinators, Departmental Security Administrators, Central Research and Payroll Administrators.

In order to develop an appropriate training strategy, it was first necessary to understand what the target training audiences needed to do with regard to the business of reporting effort.

The outcome of this analysis was the identification of two distinct training needs. First, training would need to teach faculty, administrators and staff how to perform the business functions that would ensure compliance with effort reporting policy. And second, training would need to teach end-users how to report and certify effort using ERS.

Both of those training needs are discussed below.

#### A. Effort Reporting: Business Functions

The first category of training need relates to ERS business functions. All target audiences must have the information they need to perform the business functions associated with reporting effort thereby ensuring compliance with University policy and federal requirements.

At UC, various faculty members and administrative groups are responsible for performing and administering specific business functions in order to assure that effort is reported and certified accurately and on time.

The business functions that fall under the rubric of reporting effort are:

- **Project Oversight:** overseeing federally funded projects and effort expended, reported and certified.
- **Policy/Compliance:** ensuring that faculty and staff comply with federal and UC campus-specific guidelines for reporting effort.
- **Administration:** ensuring that appropriate organizational structures, processes and procedures are in place so that effort is reported accurately and on time.

- **Notification:** notifying all appropriate faculty and staff to review and certify effort according to specified timing.
- **Coordination:** ensuring all appropriate faculty and staff have the proper tools and information in order to report/certify effort.
- **Certification:** certifying that reported effort is accurate and reflects actual effort expended for self and any others for whom that individual is responsible.

Each target audience identified by the ERS Management Group has specific and sometimes unique responsibilities with regard to performing the business functions associated with reporting effort. For example, Principal Investigators have ultimate responsibility for Project Oversight; while PIs, Faculty and Key Academic Personnel all have compliance, administrative and certification responsibilities. ERS Coordinators perform coordination activities, but do not certify effort.

Table IV: Reporting Effort – Target Audiences and the ERS Business Functions on the next page shows where the roles and responsibilities of target training audiences with regard to performing ERS business functions overlap and where there is exclusivity.

**Table IV: Reporting Effort – Target Audiences and ERS Business Functions**

<b>Target Audiences:</b>	<b>ERS Business Functions:</b>
Principal Investigator	<ul style="list-style-type: none"> <li>• Project Oversight</li> <li>• Policy/Compliance</li> <li>• Certification</li> </ul>
Other Faculty and Key Academic Personnel	<ul style="list-style-type: none"> <li>• Policy/Compliance</li> <li>• Administration</li> <li>• Certification</li> </ul>
Department Research Administrators (e.g., Fund Managers, MSOs/CAOs/CFOs)	<ul style="list-style-type: none"> <li>• Policy/Compliance</li> <li>• Administration</li> </ul>
ERS Coordinators	<ul style="list-style-type: none"> <li>• Notification</li> <li>• Coordination</li> <li>• Administration</li> </ul>
Central Research Administrative Offices	<ul style="list-style-type: none"> <li>• Policy/Compliance</li> <li>• Administration</li> </ul>

Payroll Office	<ul style="list-style-type: none"><li>• Administration</li></ul>
Department Security Administrators	<ul style="list-style-type: none"><li>• Security Administration</li></ul>

## B. Effort Reporting: System Use

The second category of training need relates to using ERS. Targeted training audience will need to know how to use ERS to report and certify effort.

Inherent within ERS are five distinct roles that allow the user to perform specific activities. ERS roles and their related authorized activities are identified below in Table V: ERS Roles and Authorized Activities.

**Table V: ERS Roles and Authorized Activities**

<b>ERS Role:</b>	<b>Authorized Activities:</b>
Viewer	<ul style="list-style-type: none"><li>• Access ERS</li><li>• View effort reports</li></ul>
Reviewer	<ul style="list-style-type: none"><li>• Access ERS</li><li>• Review effort reports</li><li>• Edit effort reports</li><li>• Add comments</li></ul>
Certifier	<ul style="list-style-type: none"><li>• Access ERS</li><li>• Review effort reports</li><li>• Edit effort reports</li><li>• Add comments</li><li>• Certify effort reports</li></ul>
ERS Coordinators (Department-based)	<ul style="list-style-type: none"><li>• Receive notification</li><li>• Access ERS</li><li>• View effort reports</li><li>• Track completion of certification</li><li>• Follow-up on incomplete or late efforts</li></ul>
Departmental Security Administrator	<ul style="list-style-type: none"><li>• Access ERS</li><li>• Grant appropriate access</li><li>• Remove access</li></ul>

## **C. Training Requirements**

Based on an analysis of training needs, the environment in which training will be delivered and the range of training audiences, a number of training requirements have been identified.

1. ERS training must provide information to faculty, administrators and staff how to:
  - Perform business functions associated with complying with the federal requirements for reporting effort.
  - Utilize ERS to report and certify effort.
2. Training products should be simple, straightforward and tailored to audiences on a need-to-know basis that is specific to their performance needs.
3. Training products should be easily accessible and usable in a variety of learning environments: from personal desktops, in a classroom situation and within departmental groups.
4. Training should be self-paced and available on-demand by all faculty and staff who need it.
5. UCOP delivered training products should provide comprehensive baseline information that can be modified, enhanced and customized by individual campuses to fill their own unique needs and purposes.

## **IV. Proposed Training Strategy**

### **A. Approach**

ERS training must be targeted to a variety of audiences. Each of these audiences has specific informational needs. Sometimes those needs overlap and sometimes they are mutually exclusive. For example, a Principal Investigator needs to know about policies, project oversight responsibilities, and how to certify effort, but does not need to know how to perform certain administrative and/or coordination functions. A Departmental Security Administrator needs to know how to grant appropriate access and remove that access, but may not need to know how to edit and certify effort.

To accommodate the needs of a wide range of training audiences, it is recommended that all training content for all targeted audiences be organized into distinct, separate and mutually exclusive modules. Content would be divided into modules organized by function and performance requirement. The combined modules would address University policy and federal requirements and performance of all business function as well as system usage. Trainees would simply access those training modules pertinent to their performance needs, bypassing those modules that were not.

This approach lends flexibility to the ultimate training and allows each person, regardless of their role/responsibility, to access only that need-to-know training/content required to perform specific functions.

## B. ERS Training Modules

The proposed modules and their associated topics are identified in Table VI, below.

**Table VI: Proposed ERS Training Modules**

<b>Module:</b>	<b>Proposed Topics:</b>
Project Oversight	<ul style="list-style-type: none"> <li>• Principal Investigator Role/Responsibilities</li> </ul>
Policy/Compliance	<ul style="list-style-type: none"> <li>• Federal Policy Guidelines</li> <li>• UC Policy</li> <li>• Effort Reporting</li> <li>• Cost Sharing (committed vs. uncommitted)</li> </ul>
Administration (Research, Departmental and Payroll Office)	<ul style="list-style-type: none"> <li>• Overview of System</li> <li>• ERS system data and calculations</li> <li>• Report Usage</li> <li>• Coordinator Messages</li> <li>• Timing</li> </ul>
Coordination	<ul style="list-style-type: none"> <li>• Timing</li> <li>• Notification</li> <li>• Report Usage</li> <li>• Tracking</li> <li>• Follow-Up</li> </ul>
System Usage	<ul style="list-style-type: none"> <li>• System Navigation</li> </ul>



	<ul style="list-style-type: none"><li>• View</li><li>• Review</li><li>• Add comments</li><li>• Certify</li><li>• Compliance Monitoring</li><li>• Report Usage</li><li>• Re-issuance of effort reports</li></ul>
System Security Administration	<ul style="list-style-type: none"><li>• Grant access to ERS functions by role and organizational hierarchy</li><li>• Remove access</li></ul>

### C. ERS Training Content

In Table VII below, detailed content for each proposed topic within each training module is identified. This content although comprehensive is by no means complete and as development proceeds, it is entirely possible that there will be additions and changes.

**Table VII: Proposed Training Modules Topics and Content**

<b>Module:</b>	<b>Proposed Topics:</b>	<b>Content:</b>
Project Oversight	<ul style="list-style-type: none"> <li>• Principal Investigator Role/Responsibilities</li> </ul>	<ul style="list-style-type: none"> <li>• What is the P/Is role in project oversight?</li> <li>• What are the responsibilities of P/Is regarding project oversight?</li> </ul>
Policy/Compliance	<ul style="list-style-type: none"> <li>• Federal Policy Guidelines</li> <li>• UC Policy</li> <li>• Effort Reporting</li> <li>• Cost Sharing</li> </ul>	<ul style="list-style-type: none"> <li>• Federal policy and guidelines regarding effort reporting.</li> <li>• UC policy - general guidelines for complying with federal policy (campuses may supplement this section with their own specific policies).</li> <li>• Who certifies effort reports? (as dictated by policy)</li> <li>• How does cost sharing factor into effort reporting (committed vs. uncommitted)?</li> </ul>
Administration <ul style="list-style-type: none"> <li>• Departmental</li> <li>• Central Research Administration</li> </ul>	<ul style="list-style-type: none"> <li>• Overview of System</li> <li>• ERS system data and calculations</li> <li>• Report Usage</li> <li>• Coordinator messages</li> </ul>	<ul style="list-style-type: none"> <li>• How does ERS work?</li> <li>• Who is responsible for what?</li> <li>• Definition of various ERS roles</li> <li>• What data is captured and reported by the</li> </ul>

Module:	Proposed Topics:	Content:
<ul style="list-style-type: none"> <li>• Central Payroll Offices</li> </ul>	<ul style="list-style-type: none"> <li>• Timing</li> </ul>	<p>ERS?</p> <ul style="list-style-type: none"> <li>• How does ERS calculate effort?</li> <li>• When do effort reports need to be certified and completed?</li> <li>• What do you need to verify on effort report? (that the total percent of effort, including cost sharing, and the amount directly charged to the fund is correct).</li> <li>• How to review and interpret edits and take appropriate action.</li> <li>• How to monitor reports for compliance.</li> <li>• Schedule for reviewing and analyzing effort reports.</li> <li>• When will effort reports be re-issued? (when requested, after payroll expense transfer has occurred).</li> <li>• How to use edit reports to monitor compliance on a campus-wide basis.</li> <li>• How to run queries.</li> <li>• PPS Data and how it is used by ERS</li> <li>• How are individual pay transactions identified for inclusion/exclusion</li> <li>• DOS and title code attributes</li> </ul>
<p>Coordination</p>	<ul style="list-style-type: none"> <li>• Timing</li> <li>• Notification</li> <li>• Tracking</li> </ul>	<ul style="list-style-type: none"> <li>• Content and timing of notifications.</li> <li>• Responsibilities for coordinating effort reports</li> </ul>

Module:	Proposed Topics:	Content:
	<ul style="list-style-type: none"> <li>• Report usage</li> <li>• Follow-Up</li> </ul>	<ul style="list-style-type: none"> <li>• Responsibilities for coordinating effort reports for employee in multiple departments.</li> <li>• Notification of certifiers to review/certify effort <ul style="list-style-type: none"> <li>○ Notify employees to certify effort</li> <li>○ Track completion of certification</li> <li>○ Follow-up on late, incomplete effort reports</li> </ul> </li> <li>• Timing elements of certification process.</li> </ul>
System Usage	<ul style="list-style-type: none"> <li>• System Navigation</li> <li>• View</li> <li>• Review</li> <li>• Add comments</li> <li>• Certify</li> <li>• Compliance Monitoring</li> <li>• Report Usage</li> <li>• Re-issuance of effort reports</li> </ul>	<ul style="list-style-type: none"> <li>• How to log-on</li> <li>• How to navigate the system</li> <li>• How to find a record</li> <li>• How to update record</li> <li>• How to add a comment</li> <li>• How to certify effort</li> <li>• How to monitor for compliance: <ul style="list-style-type: none"> <li>○ Re-issuance of effort reports</li> <li>○ How to look up and identify reports that are past due</li> <li>○ Timing considerations and requirements</li> </ul> </li> <li>• How to look up incomplete reports</li> <li>• How ERS calculates effort</li> <li>• How to drill-down to detail on individual records</li> </ul>

Module:	Proposed Topics:	Content:
		<ul style="list-style-type: none"> <li>• How to process multiple certifications</li> <li>• How to add a full accounting unit (FAU) not on report</li> <li>• How to use edit reports</li> <li>• How to run queries</li> <li>• How to re-issue reports</li> </ul>
System Security Administration	<ul style="list-style-type: none"> <li>• Grant Access</li> <li>• Remove Access</li> </ul>	<ul style="list-style-type: none"> <li>• How to grant and remove access based on roles and organizational hierarchy defined by department administrators.</li> </ul>

## **V. Proposed Roll-Out of Training Products**

### **A. Pilot**

All training products will be developed in time to support the pilot of ERS at UC Davis which begins in October 2005. Training materials will be released to the pilot campus by September 15, 2005 in order to give project works groups sufficient time to orient themselves to the training products and train users.

During the week of September 19, the UCOP training and communications consultant will provide training support to the pilot project team. Materials will be revised based on feedback and a final set of training materials will be delivered by October 14, 2005.

### **B. Campus Release**

Training materials will be revised and refined after the pilot experience and re-released to the remaining campuses on January 2, 2006. The UCOP training and communications consultant will be available between January 19 and February 10, 2006 to support training orientation and customization efforts prior to campus implementation of ERS.

### **C. Delivery Mechanism(s)**

Training materials will be built in Macromedia Breeze. According to Macromedia's website:

"Breeze gives you everything you need to rapidly create, manage, deploy, and track highly engaging online training everyone can access instantly. Breeze makes it easy for anyone in your organization to create narrated multimedia courses using Microsoft PowerPoint, while providing rich tracking and reporting capabilities at the click of a button. Breeze lets you deliver both self-paced courses and virtual classes within a common curriculum, so you can address a wide range of training needs, efficiently and affordably."

A number of campuses have experience with Macromedia Breeze. This training product delivery mechanism comes highly recommended. However, not all campuses are licensed to use Macromedia Breeze and so campuses will either have to "share" their license or buy their own. It will be up to campuses to make these arrangements.

### **D. Training Deliverables**

ERS final training deliverables will include:

- Self-paced content modules (Macromedia Breeze)
- Instructions for use of training modules (Word and PDF)
- Instructor's guide outline (Word and PDF)
- Online systems support (Embedded in ERS web-based system)

**Attachment I: ERS Communications – Audiences and Messages Grid<sup>1</sup>**

The original Audience and Message Grid Developed by the ERS Management Group is included as an attachment to the ERS Communications Strategy for the convenience of reviewers who may wish to track assumptions stated in this chart to the recommended ERS Communications Strategy.

Message	Audience														
	Executive Vice Chancellors	Vice Chancellors of Research	Academic Council	Deans	Chairs	Academic Senate	Campus Work Groups	Management Services' Officers	Grant Administrators	Faculty – Principal Investigators	Faculty – Other	Key Academic Personnel	Research Administration (Pre/Post-Award)	Payroll Office Staff	Department Security Administrators
Why do we need to do effort reporting?	✓	✓	✓	✓	✓	✓				✓	✓	✓			
What is effort reporting?	✓	✓	✓	✓	✓	✓				✓	✓	✓			
What is the Effort Reporting System (ERS)?	✓	✓	✓	✓	✓	✓				✓	✓	✓			
What is the timeframe for beginning to use ERS?	✓	✓	✓	✓	✓	✓				✓	✓	✓			
What are the implications to workload for Faculty?	✓	✓	✓	✓	✓	✓				✓	✓	✓			
What are the implications to workload for Department Staff?	✓	✓	✓	✓	✓	✓				✓	✓	✓			
Management of the effort reporting process							✓	✓	✓						
Use of the ERS system							✓	✓	✓	✓	✓	✓			
Policy implications							✓	✓	✓	✓	✓	✓			
View of system data & calculations													✓	✓	
How do I set up people?															✓

<sup>1</sup> Source: ERS Management Group; March 9, 2005