Research Metrics Focus Group meeting

5/21/2010

Attendees: Anne Hannigan (AH), Kathleen Thompson (KT), David O’Brien (DOB), Rana Glasgal (RG), Clare Hansen-Shinnerl (CHS), Mary Corcoran (MC), Bettye Price (BP)

AH called the meeting to order and gave a short introduction as to the purpose of the meeting — to discuss the Research Metrics dashboard proof-of-concept (POC). KT expressed concern that given that it is so close to the SERA implementation, is this wasted time? Maybe we should wait longer, until after SERA implementation. AH replied that the timing is actually good, and adding new data such as research expenditures in mid-FY11 will be good timing as well.

KT made the general comment that she didn’t like seeing charts first, she prefers lists of data first. DOB countered that the purpose of this dashboard is high-level, visual data, not detailed data. AH, RG, and others agreed.

BP commented that the org structure seemed weird to her. Others commented that the eCertification project made a mapping from SPIDERS orgs to admin orgs that was good and should be borrowed from for the dashboards.

KT made the general comment that for any column heading for detailed data (if we have any detailed data lists) should be precise and correct. People need to know exactly what they are looking at.

AH commented that both a faculty perspective and department perspective would be useful.

MC commented that the POC seemed proposal-data-heavy, and there wasn’t enough on awards. The group thought maybe that wasn’t true, and would be cognizant of that as the meeting went on, to see if some additional award data is necessary.

The group then started going through the POC tab by tab to decide on basic concepts such as what the prompts should be, and what the “default” graphs should be, and also which tabs are needed and which aren’t.

A primary requirement is that the user can replicate what’s in the “gray box” (the sql “where” statement) by using what is in the “green box” (prompts). Another need MC brought up is the ability to change the $ amount from total to MTDC to ODBC, etc.

The group agreed that the dashboard tabs should always start with graphs, but should give an option to look at line-by-line detail.

The group decided that the following prompts should appear on all tabs:
1. School
2. Department
3. Agency
4. Federal/Non Federal
5. Agreement type (fellowships, contr/grant, etc.)
6. Year
7. Contract type (clinical trials, etc.)

The group decided on the following three graphs as the defaults, and the default drill paths:

1. By year (quarter, month, day)
2. By school (subschool, department, faculty member) (and division for med school, e.g. Pediatrics)
3. By Sponsor

The “tabs”, or dashboard areas are:

1. Proposals
2. Proposals to Awards
3. Year to date
4. Time to Award
5. Active Awards
6. Awards ending soon
7. Outstanding proposals
8. PI
9. Sponsor Analysis

The group had ideas for these tabs as follows.

#2 – proposals to awards: should have the same prompts and drill paths as stated above. The group wants to be able to see the bottom line (total awarded amount) and look at trends. The idea behind this tab is that of the proposals submitted, how many were awarded? This is what is displayed, but concept should be made clear on the dashboard. Also, a nice to have thing for this (and other) tabs is a nominal/real dollar toggle switch.

#3 – existing tab called “trend analysis” is not needed, but the graph at the bottom with 2 bars and 2 lines should be kept and call it “year to date” tab

#4 – time to award – keep the line part of the graph (the stacks are not that interesting)

#5 – active awards – add a breakout by direct/indirect. AH would like an option to see the data as a table. Also, make sure orgs are named (not org codes), and add grant number.

#6 – awards ending soon – add direct/indirect breakdown, make sure columns are sortable.
#7 – there was some discussion about whether this was needed, and it was agreed that it should be kept. The prompt needs a range for number of days outstanding, for example, between 300 and 350 days. The group would like to add grant number and grant type (R01, R21). A sponsor hierarchy is needed (will be available in SERA, not SPIDERS).

#8 – PI – this is a list of outstanding proposals, list of outstanding awards. The current POC has statement number, but that should be deleted. Get rid of “unknown” – just leave blank. (note: will be a “-” in final version)

#9 – sponsor analysis – stacked bar graph of sponsors

Segment details are not really needed in a dashboard level tool, and it’s hard to get right now, so that tab will be deleted.

The group closed by talking briefly about next steps, and who can help out with data definitions and making sure the data is what it says it is.