PRESENTATION: Proposal and Award Metrics Dashboard, Lori Cripps and Jeff Lessard
Lori Cripps and Jeff Lessard gave a presentation on the new Proposal and Award Metrics Dashboard (see PowerPoint presentation attached)

- Summary page
  - Organized by proposal submission date, broken down by amount, status, etc.
  - Bookmarks/favorites: will be able to save them as a bookmarks
  - Will visually display submitted proposal volume by submission year, proposal volume by month submitted, cumulative proposal volume by month submitted
  - Can also look visually at success rates vs. grants not yet acted on, grants not funded

- Proposal Amount
  - Will visually display submitted proposal dollars and awarded dollars by submission year

- Funding Source
  - Volumes and dollars are grouped by funding source and can be drilled down further to primary sponsor
  - The graph aggregates volumes and dollars across all years; the timeframe can be filter using the date filters
  - Table by fiscal or calendar year

- Tabs for: Purpose, Agreement type
  - Graphs break out volumes and dollars by purpose and agreement type
  - How all volume and dollar compare, with all years (can use filters to refine)

- NIH Funding Mechanism
  - Cumulative NIH Award Dollars by month of submission
  - NIH Award dollars by funding mechanism and year of submission
  - NIH Award dollars by agency and year of submission

- Detail View
  - Can see a list of all data points at the individual proposal level

Questions/Comments:
- Who are users?
  - Generally, higher level of administration – to monitor trends
  - Can be accessed by any member of UCSF that wants/needs to have access

- Great for understanding success rates

- What years do we have?
  - Fiscal: 2013-14, 2014-15 working on 2015-16. Calendar: 2014, 2015, working on 2016. Data will be shown using default of calendar year, but can also view via fiscal year

- What about applications that have not been awarded?
  - They will be closed out after 12 months, if awarded after that time, it will be reopened.

- Who are the PI's that can be viewed?
  - Currently the primary/lead investigator, not co-investigators

- This phase was focused on activity, next phases will work to answer the various questions that arise
  - This effort stemmed from the question, ‘what is our success rate’

Next Steps:
- None noted
DISCUSSION: Future Topics
RAB members discussed possible future meeting items/presentations
- Jenny Grandis, Dan Lowenstein, Gretchen Kiser leading off next year
- Members of the board to think of items, including best practices in your division that would be good to have across campus
- Suggestions
  - Bridge Funding
  - Update on various campus improvements, plans
  - Salary gap/cap (working on it by department, but continues to be an issue)
  - NIH not allowing for mandated salary increases
  - My NCBI settings
    - URL for PI’s citations is not editable and only shows the first 5 authors. The BioSketch is editable, but this is limited in citations that it presents.
  - Lack of housing
  - Alternative for effort reporting system
  - Conflict of interest reporting
  - Updates from all RDO programs
Proposal and Award Metrics Project

Presentation to the Research Advisory Board

Lori Cripps & Jeff Lessard – Strategic Initiatives
Controller’s Office

November 3, 2015
Agenda

Topics

- Project overview
- Preview of the Proposal and Award Metrics Dashboard
- Questions
A collaborative effort between:

- Office of Sponsored Research (OSR)
- OSR Advisory Board
- IT Enterprise Data Warehousing and Analytics
- Controller’s Office Strategic Initiatives

Goal: Create a new reporting tool designed to meet the following needs:

- On-demand access to select proposal and award data
- Metrics to manage more effectively and efficiently
As an initial tool, the *Proposal and Award Metrics Dashboard* focuses on answering the following questions:

- How many submitted proposals were awarded?
- How many proposal dollars converted into award dollars?
- What is the proposal award rate by funding source, purpose, PI, department, and type?
- What does the trend look like over time?
Project Metrics – How were they decided?

The OSR Advisory Board participated in a series of meetings to determine:

- Metrics to be included – what to measure and how to measure it
- Data definitions – agreement of data terms and meaning
- Data visualization – which ‘picture’ best illustrates the point
- Filter parameters – how do we want to ‘slice’ the data

Prototype development was an iterative process

- Metric ideas presented, reviewed, and reworked
The initial phase is focused on delivering a “quick win” based on data that are readily available:

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<thead>
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<th>Measure</th>
<th>By</th>
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<tr>
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Proposal and Award Metrics Dashboard

Preview
Questions?

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