FDP Meeting Summary

September 6 - 8, 2017

Pipelines Group

Point of Contact	Michele Masucci
Activities/Progress to Date	The pipelines group is reviewing a final manuscript of a report on work-life-balance-satisfaction approaches at member institutions, which can serve as an inventory of programs as a resource for FDP institutions.
Agenda/Discussion Points	
Pending Decisions	The key decision made was to circulate to participating members of the committee to complete the tasks of updating the literature cited as appropriate, reviewing the methodology, and formatting the document.
Participation	There were 8 members in attendance at the meeting.
Key Risks/Issues	N/A
Meeting Summary	We aim to review the document during the time prior to the next meeting so that the report can be presented to the communication meeting.
Volunteer Opportunities	This will be addressed as we move forward with new agenda items once the report is finalized.

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ERA - Transforming Grants.gov to Work for You

Point of Contact	Angela Mercado, Grants.gov
Activities/Progress to Date	ERA JAD is working with Grants.gov to help plan for future enhancements.
Agenda/Discussion Points	
Pending Decisions	Include sessions in future FDP meetings on status of Grants.gov vision
Participation	Open to all attendees
Key Risks/Issues	Proliferation of other portals for submitting applications will add to burden of universities. Need to mitigate issues with portals such as ezFedGrants for USDA
Meeting Summary	Your success is our success. Help us design an efficient, effective nextgeneration grants system through your feedback. Join the Grants.gov transformation team for this interactive session to shape the future of Grants.gov.
Volunteer Opportunities	FDP members should provide feedback through Grants.gov website

FDP Meeting Summary

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eRA Federal Agency Matrix Working Group

Point of Contact	Lynda Wolter (lynda.wolter@northwestern.edu)
Activities/Progress to Date	Develop a summary of federal agency systems used throughout the life cycle of sponsored activities. Version 1 of the Summary of Systems is near complete. Goal to have data entry done by the end of September with an initial release in mid-October/early November. Develop a systems used summary by the project life cycle time points and a summary of systems by agency.
Agenda/Discussion Points	
Pending Decisions	1. Complete Summary Sheet data entry and review by end of September 2017 2. Create a google doc version for data entry/sharing 3. Publish version 1 of the Summary by November 4. Develop a dictionary of system names/abbreviations 5. Develop a summary by life cycle time point by Agency and System used (to show the complexity and multiple systems used)
Participation	
Key Risks/Issues	Need to develop a technical solution for the end format to display data dynmically Need volunteers to review the technical/system to system information
Meeting Summary	Version 1 of the Summary of Systems is near complete. Goal to have data entry done by the end of September with an initial release in mid-October/early November. Additional tasks identified as summarized in Key Decisions Pending above.
Volunteer Opportunities	

Membership Committee Meeting

Point of Contact	Administrative: Katherine V. Kissmann, Texas A&M University; Federal: Charisse Carney-Nu
Activities/Progress to Date	Registration desk - provide assistance to FDP staff at each meeting Institutional mentoring - match new attendee institutions with mentors, as requested ERI activities - work with ERI to facilitate their efforts and become a separate committee Member attendance and feedback - work with FDP staff to monitor attendance and provide feedback Annual report - review, analyze and summarize for Executive Committee Election - gather candidate statements and photos for website for voting
Agenda/Discussion Points	
Pending Decisions	Incorporation of Faculty Engagement Working Group into Membership Committee Institutional vs. System Memberships Extend time for registration desk on Day One of meeting
Participation	Susan Anderson – College of Charleston; Deborah Bordelon - Governors State University; Webb Brightwell – Harvard University; Glory Brown - Florida A&M University; Andrea Deaton – University of Oklahoma; MaryAnn Deom – University of Georgia; Gina Hedberg - University of South Alabama; Jeanne Hermann – University of Tennessee Health Science Center; Michael Kusiak - University of California; Jennifer Morehead Farmer – Governors State University
Key Risks/Issues	Review and summarize annual report data for Executive Committee Assist with website construction/maintenance Institutional profiles should be updated annually - may need to remind participants Possible incorporation of the Faculty Engagement Working Group into Membership Committee Plan to engage more federal agency participation Provide assistance to ERA committee
Meeting Summary	•⬛Meeting Minutes/Summary - on website for Committee, meeting summaries have not been updated since 2015 – may be due to moving to the new format for meeting summaries. In future, will post full summary on the Committee website in addition to the summaries posted for each meeting.

•Registration Table - recommendation made to have registration table stay open longer on the first day of the meeting to allow for attendees arriving during the reception to obtain their name badge during the reception. Recommendation to send out Guidebook instructions via email immediately prior to the meeting along with a reminder to print a copy of the agenda to bring to the meeting if the Guidebook will not be utilized. Recommend to put Guidebook information on the screens prior to the Opening Welcome. Recommend to have Guidebook assistance at the registration desk.

•New Attendee Reception - the Executive Committee held a new attendee reception immediately prior to the general Welcome Reception. It was well attended and had a favorable response from the EC and attendees. Recommend that this be a permanent event at future meetings and to include the membership committee in the new attendee reception.

•New Attendee Orientation – 34 people attended the orientation. Questions were reduced from previous meetings because questions were answered at the new attendee reception. Recommendation made to survey new attendees to get feedback on the reception and orientation and determine what can be done to make their experience better or what would have been helpful to know prior to attending the meeting that was not addressed.

•Membership Participation Guide – Recommendation to create a membership participation guide that will clearly articulate the definitions and roles of each type of institutional representative and committee, workgroup, membership, etc. and what the expectations are for each.

•Elections – Review election process to see if any changes are needed for future elections. Request election statistics from David Wright including how many nominations were received, how many votes were cast, etc. to determine if the process needs improvement.

•Annual Report – Annual reports were due May 31. Final report was received August 8. Review, analysis and summary is in process.

•Member Attendance and Engagement
Membership has grown to >400 in attendance at the meetings. Original intent was for attendees of the meetings to get involved in the demonstrations and participate and serve on committees. Due to increased attendance it is hard for everyone to be engaged in all activities and/or know how to become engaged. Communications regarding the working groups and pilots has also become complicated with the increased number of attendees. Much discussion regarding how to keep members engaged when they leave the meetings and the use of the website and listservs. Also discussed the option of a more formalized process for joining committees and for providing status of committee work to the membership. Previous meeting's recommendation to update the meeting summaries to include a section for volunteer opportunities and a contact for each opportunity will be implemented with this meeting

Volunteer Opportunities

Contact: Katherine V. Kissmann
kkissmann@tamu.edu

New attendee experience survey - Jeanne Hermann, Michael Kusiak, Webb Brightwell.
This subcommittee will prepare and submit a survey to new attendees to determine the

success of the New Attendee Welcome Reception and New Attendee Orientation.

Membership participation guide - Andrea Deaton, Michael Kusiak. This subcommittee will work together to create a proposed document for review by the Membership Committee which will then be proposed to the Executive Committee to define roles and expectations for each of the member types, institutional roles, etc.

eRA - Become a Grants.gov Workspace Wizard

Point of Contact	Ed Tan, Grants.gov
Activities/Progress to Date	the ERA JAD team is working with Grants.gov to communicate the changes for applicants coming at the end of December, 2017
Agenda/Discussion Points	
Pending Decisions	Are all FDP members aware that current application process changes at end of calendar year? Will Grants.gov follow current deadline for changes: Dec 2017?
Participation	Open to all attendees of Sep meeting Session was taped
Key Risks/Issues	Given that only a small number of institutions are currently using Workspace, there is a risk that the December 2017 deadline will impact institutions and their ability to submit applications
Meeting Summary	Grants.gov demonstrated how to apply using Workspace and the ease of using online webforms. Grants.gov plans to phase out the Legacy PDF on December 31, 2017, so please join us to receive helpful tips and answers to your questions about Workspace. Names/titles of the presenters: Ed Calimag, Diane Schroeder, Kavitha Vemula, Ed Tan
Volunteer Opportunities	Volunteer as testers in Grants.gov UAT

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Subawards Workgroup: Fixed Price/Clinical Trials

Point of Contact	
Activities/Progress to Date	During this session, we reviewed the regulations surrounding the requirement to obtain prior approval for fixed price subawards and the Simplified Acquisition Threshold (SAT) cap for fixed price subawards. After reviewing the regulations, we discussed the draft guidance created for both pre-award proposal submission and post-award prior approval requests, which includes multi-site clinical trials. During open discussion, attendees discussed the differences between fixed price and cost reimbursement, practices in contracting for fixed price subawards, clinical sites and the differences from traditional subawards, and feedback received from sponsors on prior approval requests. Next steps include continuing to reach out to get clarification from OPERA on NIH's position on the topic and creating a white paper to move the topic forward with federal agencies. In addition, any FDP members that have asked for prior approval and received a sponsor response are asked to forward those to Jennifer.mccallister@duke.edu in order to be included in the white paper data.
Agenda/Discussion Points	
Pending Decisions	
Participation	
Key Risks/Issues	
Meeting Summary	
Volunteer Opportunities	

Contracts (including Data Stewardship)

Point of Contact	Speakers: Melissa Korf and Jill Frankenfield
Activities/Progress to Date	DTUA working group: - Final DTUA template documents were released in May 2017. These template documents can be used to transfer de-identified human data and a Limited Data Set. A blank version of Attachment 2 can be used where a specified Attachment 2 does not yet exist. -Guidance documents (Glossary, Guidance Chart, and Tool for Classifying Human Subject Data) were posted over the summer.
Agenda/Discussion Points	
Pending Decisions	
Participation	Members of the Contracts and Data Stewardship subcommittees
Key Risks/Issues	
Meeting Summary	-Melissa and Jill will work with FDP leadership to propose and plan a more formal pilot of the DTUA template. Any interested institutions should email Melissa and Jill. The working group will also consider an email to Admin Reps formally requesting feedback on what each institution would need in order to adopt the templates. We will also look into posting information on which institutions have agreed to use the templates. -Several member institutions are interested in hearing more about JHU's approach/documentation with respect to the Mexico City Policy changes. -Several attendees are interested in re-invigorating the Troublesome Clauses project and/or developing a set of FAQs to facilitate conversations between institution negotiators and contracting officers regarding the new CUI-related contract clauses.
Volunteer Opportunities	If anyone would like to join the Data Transfer and Use Agreement working group to discuss use of the templates for FERPA-covered data or more generally, please let Melissa Korf know at Melissa_Korf@hms.harvard.edu. Working Group calls are every other Friday (next call is September 29th) from 1-2pm Eastern. If your institution is interested in participating in a pilot of the Data Transfer and Use Agreement template, please let Melissa and Jill know at Melissa_Korf@hms.harvard.edu and jfranken@umd.edu. Further details on timing and time commitment will be forthcoming shortly.

Expanded Clearinghouse

Point of Contact	Lynette Arias, Pamela Webb, Jennifer Barron
Activities/Progress to Date	The pilot was completed on June 30th, and the final report was delivered to the FDP Executive Committee. Possible future enhancements include: pull data from other systems, as feasible (SAM); automatic notifications to POC for expired information; APIs (Application Program Interface); additional reports and data output. Working group for non-single audit organization financial questionnaire and integration with RAQ continues work.
Agenda/Discussion Points	
Pending Decisions	Executive Committee is currently considering the following recommendations included in the Final Report: RECOMMENDATION 1: Invite the remainder of FDP to join, on a one-by-one basis at whatever point of time they wish, from September 15, 2017 – December 31, 2017. RECOMMENDATION 2: At the start of the next FDP phase, make participation in the Expanded Clearinghouse mandatory for FDP members. RECOMMENDATION 3: For a fee, invite non-FDP members who are also single audit recipients to join beginning October 1, 2017, on a one-by-one basis. RECOMMENDATION 4: At a future time and for a fee, invite non-FDP members who are not single audit recipients to join the Expanded Clearinghouse on a one-by-one basis. RECOMMENDATION 5: Allow the FDP Executive Committee to determine use of revenue from non-members to support the following (listed in priority order): ? Expanded Clearinghouse maintenance, ? Continued enhancements, ? Other FDP pilots or projects RECOMMENDATION 6: Allow FDP Expanded Clearinghouse working group to continue their development and enhancement work, including: ? Development of an API ? Determination of how the data might be used to inform future federal decision-making processes ? Development of section of Clearinghouse for non-Single Audit financial questionnaire type info ? Assess feasibility and impact of vendors having access to the Expanded Clearinghouse data or being able to access via the API ? Assess feasibility of merging FCOI Clearinghouse or other areas of FDP data into the Expanded Clearinghouse
Participation	Session was attended by approximately 100 individuals, most of whom were part of the Pilot and some others who are interested in joining the Clearinghouse in the future.
Key Risks/Issues	Risks moving forward include entities not using the clearinghouse profiles as originally planned, not keeping their profiles current, entities still continuing to use their forms that

they are comfortable with.

Issues identified include the level of effort required both by organizations and clearinghouse working group to maintain the Profiles, the limited resources to make improvements to the online system.

Meeting Summary

A brief background and purpose of the Pilot was discussed, including description of cohort 1, 2 and 3, and a brief demo of the system. Final tracking data was shared, as well as time saved metrics. We went over all of the resources required to complete the PIlot, discussed Phase III - Post Pilot plans, and reviewed the recommendations in the final report. See presentation for more details.

Volunteer Opportunities

If you are interested in joining the API working group or the financial questionnaire working group, please contact the Clearinghouse co-chairs or fdpechelp@gmail.com. We are also taking volunteers for ongoing guidance development. We encourage all institutions who aren't already in the Clearinghouse to join!

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NSF Modernization of Proposal Preparation and Acct

Point of Contact	William Daus
Activities/Progress to Date	N/A
Agenda/Discussion Points	
Pending Decisions	N/A
Participation	60-80 attendants to the meeting. Several questions and comments made.
Key Risks/Issues	Issues Identified: Desire from community to pre-populate COA and Current & Pending Support during proposal preparation Roles other than PI to initiate a proposal Sometime conditional documents such as postdoctoral mentoring plan may not be entered first prior to budget data entry for postdoctoral scholars, but current approach would not allow this.
Meeting Summary	Agenda was followed: Proposal Submission Modernization Introduction & Demonstration Account Management Modernization Overview & Walkthrough Q&A held at the end.
Volunteer Opportunities	NSF ERA Forum Webinar - September 19, 2017, 1:00 pm EDT Visit https://www.nsf.gov/bfa/dias/policy/era_forum.jsp for details

Subawards

Point of Contact	Amanda Humphrey, Stephanie Scott, Amanda Hamaker
Activities/Progress to Date	Clinical Trial - Fixed Price Prior Approval - Working group completed sample language for proposals and post-award requests to sponsors. Expanded topics to include SAT restrictions. Continue to email any experiences making these prior approval requests and the responses you receive to Jennifer McCallister at jennifer.mccallister@duke.edu Annual Templates - 2017 updated templates to be released after September meeting.
Agenda/Discussion Points	
Pending Decisions	Carryover Guidance - Released in August as draft guidance. Reminder that carryover has been moved from attachment 2 to attachment 4. • Comments on the draft that was sent out: ? If you choose no, can we remove some of the extra things that appear? ? Can we add headers to the modification template to make it easier to navigate/review?
Participation	Active discussion surrounding the Vision Quest - Planning to try to align with future plans of the membership. Who is using electronic programmed templates? (See list of questions on the slide) • Who is using electronic forms for their systems? All homegrown - approximately 10-12 institutions ? Discussion from one Univ system that uses the RTF which doesn't work with the adobe format. Would be good if they could use the new adobe templates and still populate data from their system. ? Can we get to the point where the Expanded Clearinghouse and the templates were merged? Can it give Red, Yellow, Green light for the sub as to risk (audit, etc) - quick links to the fringe benefits, F&A links. An enhancement to what we have today. § Mention of possible hybrid option • How many have the creation of systems in their 5 year plan? Another 10-12 - all indicate homegrown or not sure. Need is definitely growing. • Requested feedback on the cross-walk process. May not be able to build something that works for every institutions systems. But can we find a middle ground that fits closer. • How are the templates working? ? Some think they are great. ? Vendor perspective is that there is more activity happening than we are aware of in terms of institutions going electronic or using the templates "everywhere." ? Incorporating data use terms when there is human subjects data - struggling with how to identify when the sub is giving or receiving data from the PTE. § One Univ added questions to their internal proposal routing form to help with communicating to the central office.

? Some pieces that are unclear on the second page of attachment 2 - make sure these are covered in the FAQs, guidance documents.

• API working group started. Tangentially related to this topic. Could be some benefit to getting everyone in the room.

• Signature systems - docu sign, etc. Attachment 3B in particular - who signs may not be who fills it out. Pre-populated pre-loaded data versus manually completed.

• FCOI versus OCI - clarification of the difference in these two things. Can something be done to address this? OCI doesn't appear very often on subawards/grants. However, may be something that should specifically be called out in the "subcontract" template. When are these applicable?

• Risk assessment group - RAQ/CAT - updating to provide risk assessment for entities that don't have a single audit. Different groups doing risk assessments at different levels/times.

? Q17 - Can this be expanded to include other academic entities such as academic medical centers.

? Point made that the form is editable and can be adapted for the institution's needs

? Need to add instructions for how to make these changes.

• Are there bigger needs?

? Question about things that change more frequently than annually (like the RTCs). Do we plan to update for these things?

§ Decision was made not to do this as it wasn't critical. Template changes are rather burdensome for some institutions because they have to send off to legal counsel for approval, etc.

§ Discussion about how people are handling amendments after the TRCs were released - institutional decision as to how specific these need to be spelled out in the amendments. General feeling is we will all follow the RTCs as applicable regardless of what is in the sub amendment.

? NIH Policy Office - Have asked them to add a designation on the NOA related to whether or not they consider the award a clinical trial? Should adjust the subaward template accordingly for this.

? When the sub versus the PTE does not agree as to the classification of clinical trial - take it back to the PI to address.

Key Risks/Issues	See above notes from participation.
Meeting Summary	Templates 2017 - Not showing the new templates here. There will be two free webinars available to view the templates in detail in the coming weeks. Templates will be posted next week. Major changes document is new this year to help people navigate through all the changes. Additionally, a crosswalk will be available for use by institutions that program the templates into their templates. Attempt is to make this easier to ERA folks. Also releasing the fixed price templates along with the cost reimbursable templates. Additionally releasing the foreign templates (cost reimbursable and fixed price). Training in September and October for the new templates via Webinar. FAQs Sept 2017 Have become just as important as the template. Very useful negotiating and training tool.

Provides background on why things are the way they are within the templates. Up to 62 FAQs now, this is an addition of 20 new FAQs with 3 removed. An additional 20 were revised. Draft FAQs were sent out prior to the meeting for feedback. Requesting responses ASAP. FAQs targeted to be released after the templates, but hopefully before the webinars. Changes to FAQs a result of template changes, release of the RTCs, release of the DTUA and guidance docs, and other clarifications.
• Don't revise the templates or you must remove the FDP logo and moniker.
• Discourage use of attachment 2 to add additional generic terms
• Unilateral mod language

Volunteer Opportunities

Annual Templates working group will reconvene in January. Volunteers welcome. See website for additional working groups.

Emerging Research Institutions (ERI)

Point of Contact	Susan Anderson
Activities/Progress to Date	Following previous federal agency presentations about relevant funding opportunity mechanisms, re-focusing on ensuring participation by ERI members in FDP demonstrations and working groups.
Agenda/Discussion Points	
Pending Decisions	Survey of ERI members to determine 2-3 specific action items to focus on, as well as review of ERI member attendance at FDP meetings and participation in working groups and demonstrations.
Participation	Eleven individuals representing five ERI member institutions, a guest from a non-ERI institution, and representatives from one federal partner attended. Additional members were prevented from attending due to their need to prepare for the incoming hurricane. Faculty ERI members attended the concurrent Faculty lunch (since the main topic of this ERI lunch was most relevant to administrators, we expected faculty to attend the other session).
Key Risks/Issues	Will survey ERI members and select 2-3 action items on which we can work.
Meeting Summary	A representative of the Expanded Clearinghouse Workgroup was invited and attended, provided updated information, and answered questions. Of the FDP members participating in the Expanded Clearinghouse, only 50% of ERI members had so far joined the effort, so this was a good opportunity to share experiences and have questions answered, to be able to encourage our home institutions that have not yet enrolled to do so. ERI attendees further discussed the desire to identify specific action items to work on, and to have more communication between meetings to maintain momentum in moving forward. An Expanded Clearinghouse Workgroup representative is willing to be on a phone call with individuals that were not able to be at meeting in September, and it was recommended that people get on the expanded clearinghouse listserv even if they are not in the clearinghouse yet. We discussed surveying members to ask what systems they are using for grant management, IRB, etc. The topic of Clinical Trials was discussed, including who may be impacted by the changing definitions – how the issue will impact us and what we need to do. There was interest in having a conversation about this with an expert in this area. It was also mentioned that having templates and best practices as resources would be helpful. Another topic of interest is IP/tech transfer issues, and non-disclosure/confidentiality issues when working with students.
Volunteer Opportunities	

Costing and Procurement Updates

Point of Contact	Sara Bible
Activities/Progress to Date	The Administrative Cost Working Group continues to work on and discuss several important topics related to implementation of the Uniform Guidance, including implementation of the Procurement Standards. During the past year the implementation of NIH's Single Institutional Review Board (sIRB) requirements has become critical. Work on these topics has been ongoing between meetings through discussions with Federal and university representatives. More recently the implementation of the public data access requirements has been a focus for the working group. The working group is focused on efficient and effective implementation of the Uniform Guidance, sIRB, the public data access requirements and other costing and regulatory issues.
Agenda/Discussion Points	
Pending Decisions	• sIRB: Whether there will be additional direct cost funding for sIRB costs. • sIRB: Whether infrastructure awards will be available to update/replace IRB systems to facilitate sIRB requirements and multiple entities entering data within a reviewing IRB's system. • Costing for public data access requirements • Clinical Trials definition • Procurement: Procedure for review and approval of a micro-purchase threshold over $10,000
Participation	Federal representatives, and University faculty and administrative representatives.
Key Risks/Issues	• Increased cost of the IRB process • Costs of commercial IRB is not known at this time • Increased workload for IRB staff and panels • Need for updated or new electronic IRB systems to accommodate use by multiple sites • Time to prepare for sIRB implementation was extended by four months to January 25, 2018. However, institutions of higher education (IHEs) are still concerned about the amount of work and systems updates that need to be made prior to the January 2018 deadline. • Direct charging sIRB costs will reduce other costs that can be direct charged to sponsored projects • The administrative burden associated with applicability to Social and/or Behavioral research is significant without associated benefits. • Readiness of institutions to function as the sIRB. Implications include adequate personnel and technology resources. • Audit firms' interpretation of the FY2017 Single Audit Compliance Supplement requirement that "costs paid for by entity funds before reimbursement is requested" means a check to pay a vendor needs to have cleared the bank account before Federal

funds are drawn or invoiced.

Meeting Summary

The topics and key risks described above were discussed at this session.

Links to the following FAQs are below:

sIRB Costing FAQs June 2017: https://osp.od.nih.gov/clinical-research/nih-policy-on-the-use-of-a-single-irb-for-multi-site-research-faqs-on-costs/

Volunteer Opportunities

Faculty/Administrator Collaboration Team (FACT)

Point of Contact	Larry Sutter, Susan Anderson
Activities/Progress to Date	This meeting session continued the substantive dialogue that began at the May meeting related to collaborative efforts and the faculty administrator relationship/partnership to achieve overall research program goals within their own institution. The group included reps from University of Washington, Michigan Technological University, and College of Charleston from the previous session. We shared information about a proposed taskforce based on initial concepts and also the robust discussion at May's meeting. Based on input from this first session, we added a private university to our panel and a representative from Northeastern presented a private university perspective on ideas discussed at our May session.
Agenda/Discussion Points	
Pending Decisions	Structure and goals moving forward; develop and obtain approval for charter; identify action items; define appropriate roles and representation.
Participation	Estimated at over 60 participants, including faculty, administrative staff, and federal representatives.
Key Risks/Issues	Appropriate structure within FDP; selection of action items to maximize engagement and produce responsive outcomes.
Meeting Summary	After providing information on the background and status of this initiative, as well as providing a perspective from a private university (Northeastern) the panel and session attendees engaged in an open dialogue about key areas of faculty and administrator collaboration. The discussion includes areas of successes as well as ongoing challenges. These notes highlight areas of opportunities for potential action by FACT. 1)Faculty Engagement and Communication within Organizations: Successes: Holding PI luncheons; having direct meetings with faculty senate committees and generally having direct communication with individuals and groups before sending emails; engaging faculty with focus on solutions, and ensuring they see results to assist with faculty finding value in engaging; cataloging key communications with topics and dates is helpful to faculty so they can access at the time needed; inviting faculty to give presentations to admin groups. Challenges: The way organizations are structured and whether or not this structure helps or hinders and whether there is separation between the research and academic sides of the house. 2)Increasing & improving faculty representation at FDP: Successes: Having VPR support in determining FDP Faculty and Admin reps; having faculty reps prepare and disseminate an "FDP Meeting Report" to encourage engagement and then communication back to faculty. Challenges: How to get faculty to attend FDP; and setting expectations for faculty reps.

Opportunities: Look to recruit more faculty reps that have both research and policy interests (i.e., public policy); put together a list of suggested characteristics to help people select a faculty rep., i.e., a list of experiences that help to be a good FDP faculty rep (e.g., NSF rotator, study sections, review panels, faculty with administrative responsibility and or specializing in the area of science policy).

3)Heterogeneity of Unit-Level Support at Organizations: Successes: Consolidating departmental administrators in single reporting stream helped (central administration, local action) as well as ensuring consistency of training across units. Challenges: unequal admin support across campus when some units have excellent, well-trained support and other less so.

4)Assessment of Research Support Effectiveness: Challenges: How do faculty and admin work together with low proposal success rates? Opportunities: Conduct an assessment/inventory on # of grants submitted per research support staff or something similar (related to the trend for increasing # of proposals submitted for fewer dollars awarded. Assess "yield and value"); and looking at faculty/administrator ratios, number of grants submitter per administrator or faculty, and success rates.

5)Orientation for Research Administrators: Successes: One institution's effort to create local orientation sessions. Challenges: not having a dedicated orientation for research admin staff or VPR office support to create own orientation for departmental staff. Opportunities: Produce a tool to help develop a standard orientation utilizing information from FDP reps as to what faculty and administrators at different institutions identify as key areas for research admin training; including grad students in orientation and training as well.

6)Interpreting Research Guidelines: Challenges: need for agency-specific proposal checklists that faculty can access just in time during proposal prep and not have to look for the various email updates; and understanding where burden is coming from, internal or external. Opportunities: developing best practices on how institutions are "interpreting" guidelines; best practices on "interpretation" or sample checklists.

7)General comments: Challenges: structure related to support, e.g., faculty rep at FDP, ability to gain faculty engagement. Opportunities: providing tools in the above areas, an FDP strength; best practices.

Volunteer Opportunities

There will be an upcoming opportunity to join our email group, and teams of faculty and administrators from FDP member organizations are encouraged to attend our session. It is likely that action items could be separated into subgroups and volunteers for these subgroups will be solicited. This would involve regular subgroup calls and potentially some additional off meeting time to gather and analyze data, write best practice or guide documents, etc.