

# National Science Foundation

Electronic Research Administration Forum



April 27, 2016



# Welcome to NSF webinar for updates on ERA activities

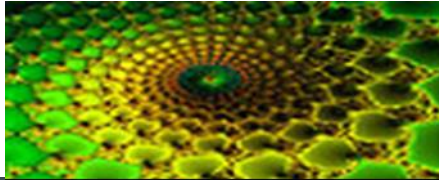
First Forum Topic:

## Proposal Submission Modernization

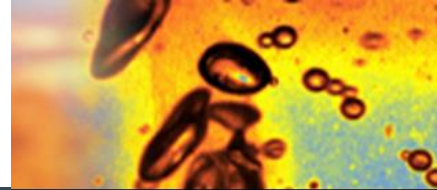
Meeting materials and forum information can be viewed at :

[https://www.nsf.gov/bfa/dias/policy/era\\_forum.jsp](https://www.nsf.gov/bfa/dias/policy/era_forum.jsp)

# Speakers



Office of Budget, Finance and  
Award Management (BFA)



Office of Information &  
Resource Management

Erika Rissi

---

Deputy Division Director,  
Division of Institution and  
Award Support

Jean Feldman

---

Head, Policy Office,  
Division of Institution and  
Award Support

Jeff Vieceli

---

Head, Systems Office,  
Division of Institution and  
Award Support

William Daus

---

Project Manager, Division of  
Information Systems

# Agenda

- Introduction
- Forum Logistics
- Proposal Submission Modernization (PSM) Initiative
- PSM Survey Summary Findings
- ERA Forum Discussion Topic:
  - Tailoring the Proposal Interface
- 2016 Notional Event Timeline
- Next Steps

# Introduction

## Forum Background

NSF's engagement with user community

### Forum Purpose

- Collect Individual opinions and perspectives on ERA activities
- Gather topics of interest for future forums
- Solicit volunteers for usability studies

# Forum Logistics

## Participation and engagement

Please use the chat feature to engage in our forum today

Submit questions, feedback and topics of interest via:

- [Emails](#)
- [Listserv](#)
- [Survey](#)

## Future events and related items

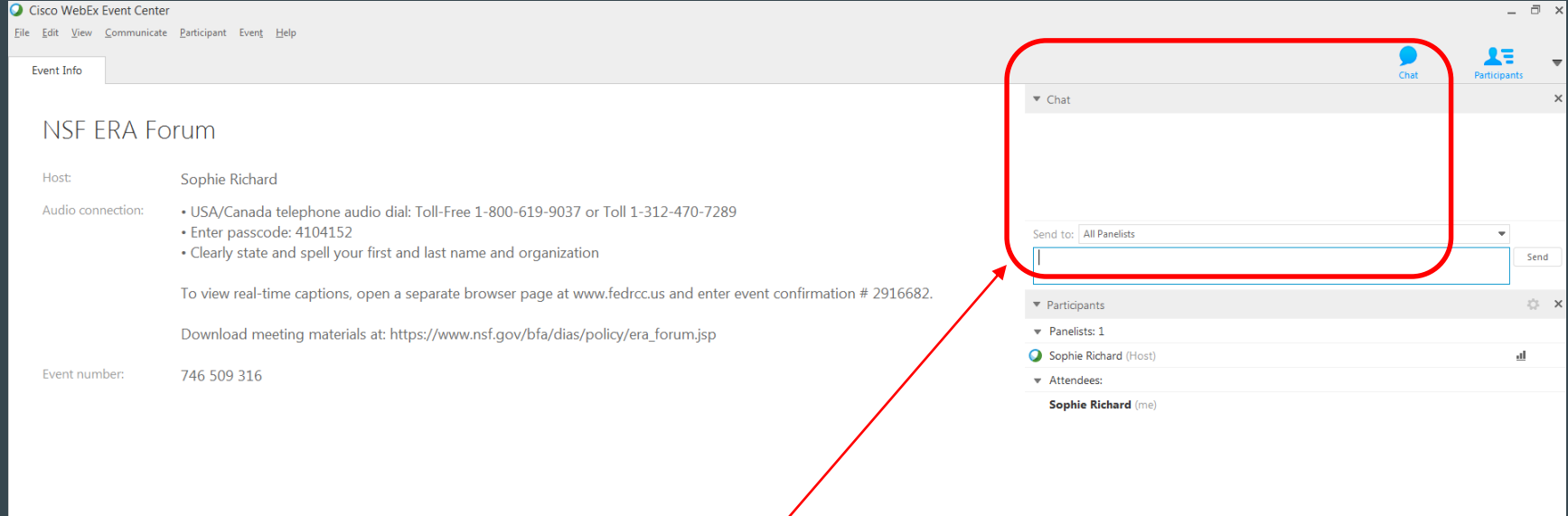
Agile approach

Frequency

Feedback

Topics of Interest

# Chat Feature and related items



The screenshot displays the Cisco WebEx Event Center interface. On the left, the 'Event Info' tab is active, showing details for the 'NSF ERA Forum'. The host is Sophie Richard. Audio connection options include USA/Canada telephone audio dial (Toll-Free 1-800-619-9037 or Toll 1-312-470-7289), passcode 4104152, and instructions to clearly state names and organizations. Real-time captions are available at [www.fedrcc.us](http://www.fedrcc.us) with confirmation # 2916682. Meeting materials are at [https://www.nsf.gov/bfa/dias/policy/era\\_forum.jsp](https://www.nsf.gov/bfa/dias/policy/era_forum.jsp). The event number is 746 509 316.

On the right, a chat window is open, highlighted with a red rounded rectangle. The chat window title is 'Chat'. Below the title bar, there is a 'Send to:' dropdown menu currently set to 'All Panelists'. A text input field is positioned below the dropdown, and a 'Send' button is to its right. Below the chat window, a 'Participants' window is visible, showing 'Panelists: 1' (Sophie Richard (Host)) and 'Attendees: Sophie Richard (me)'.

A red arrow points from the bottom-left of the chat window area towards the 'All Panelists' dropdown menu.

- Click on the chat icon on the top-right corner
- In the chat window, select “All panelists” to send your questions and feedback

# Proposal Submission Modernization Initiative

## History and Overview

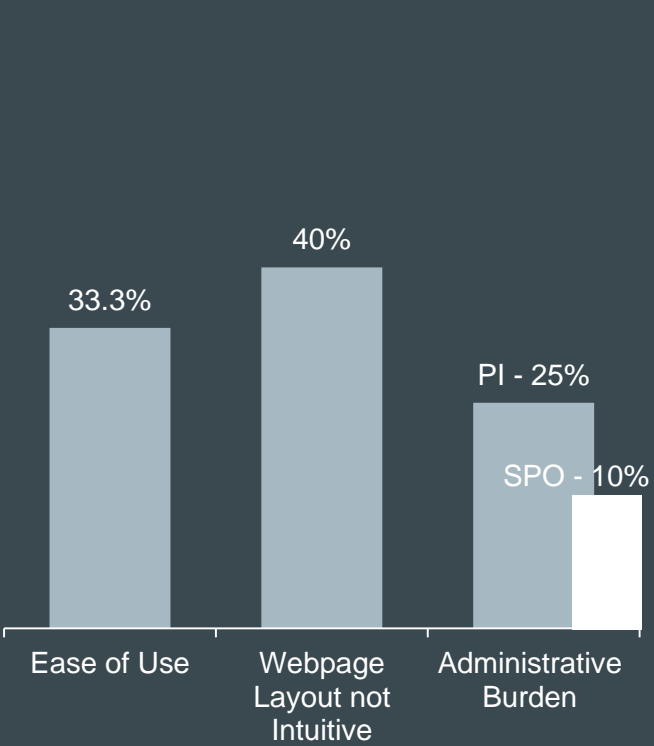
- FastLane and the Proposal Process
- PSM Initiative

---

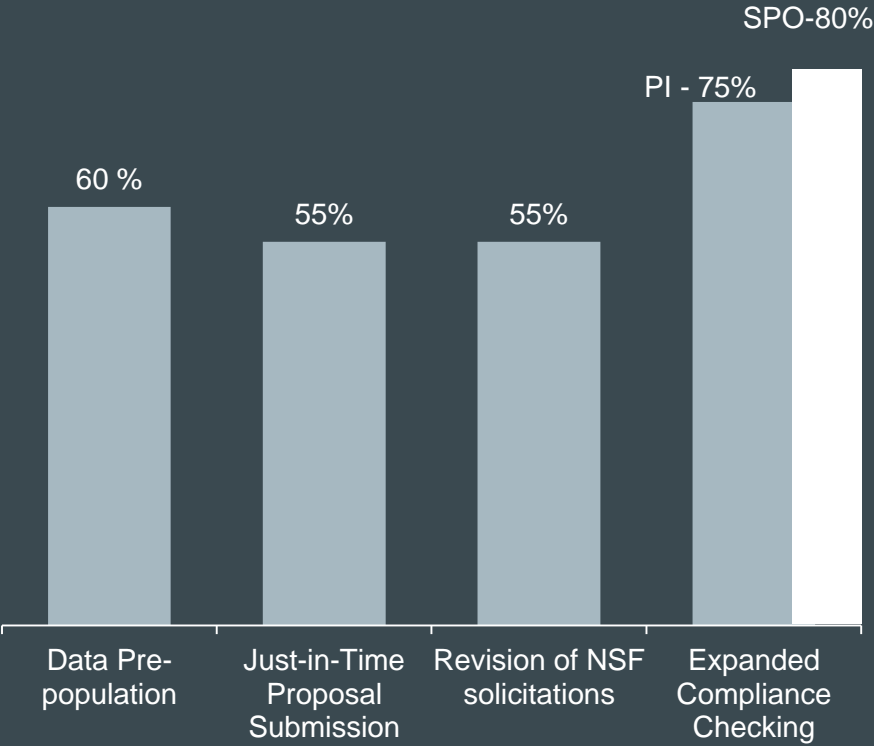


# PSM Survey Summary Findings

## The problem statement



## Suggestions for potential solutions



**ERA Forum Discussion Topic:**

**Tailoring the Proposal Interface**

# PSM Vision

- Modernize the applications supporting the merit review process and the user experience via the development of a new application
- Reduce the administrative burden to the research community and NSF staff associated with preparation, submission, and management of proposals
- Increase efficiencies in proposal preparation, submission, and management
- Improve data quality
- Capture proposal content in a way that supports data analysis

# PSM Agile Concept Development

- PSM is following an agile process to develop, review, and refine wireframes (webpage mockups) that leverages knowledge of the existing pain points
- External users will be engaged throughout the process to ensure the overall approach, workflows, and wireframes are consistent with user needs
- Development of features and enhancements will be deployed incrementally

## Identify Pain Points and Draft Improvements

- Leverage helpdesk, PSM survey, etc. to identify improvement opportunities and create initial concepts/mockups

## Review Concepts with NSF Staff Working Group

- Review initial concepts and discuss at Working Group sessions
- Refine as needed

## Review Wireframes with External Users

- Present and test wireframes with external users to validate and refine
- Usability sessions, Forum, etc.

## Internal Validation and Execution

- Brief Working Group, elevate/resolve issues and begin development
- Deliver enhancements incrementally

# Tailoring the Proposal Interface: Demonstration

[Home](#) > Proposal Preparation

## Proposal Preparation

What would you like to work on?

### Create New Proposal

Get started by answering a few questions to enable NSF to customize your proposal interface and compliance rules.

[Create Proposal](#)

[? What information will need to be provided?](#)

- After logging in, the user may start a new proposal or access draft and submitted proposals
- This discussion will focus on creating a new proposal

### In Progress Proposals

Continue working on a previously created proposal, that has not yet been submitted to NSF.

[Work with In Progress Proposals](#)

5 In Progress Proposals are available

### Submitted Proposals

View, download or withdraw proposals that have previously been submitted to NSF.

[View Submitted Proposals](#)

17 Submitted Proposals are available

- Help text provides upfront clarification of information needed to setup the proposal

## Create New Proposal

1. Funding Opportunity

2. Division / Program

3. Submission Type & Funding

4. Title & Collaborative Info

### Select Funding Opportunity

Show 10

Filter by number or keyword

Showing 1 to 10 of 46

« < PREV 1 2 3 4 5 NEXT > »

Select	Funding Opportunity Number ?	Funding Opportunity Title
<input type="radio"/>	NSF 16-000	Grant Proposal Guide - GPG
<input type="radio"/>	NSF 16-400	Division of Integrative Organismal Systems
<input type="radio"/>	NSF 16-500	Supporting Faculty in Quantitative Undergraduate Biology Education and Synthesis (QUBES)
<input type="radio"/>	NSF 16-505	Division of Integrative Organismal Systems
<input type="radio"/>	NSF 16-507	Exploiting Parallelism and Scalability (XPS)
<input type="radio"/>	NSF 16-509	Long-Term Ecological Research (LTER)
<input type="radio"/>	NSF 16-510	Big Data Regional Innovation Hubs: Establishing Spokes to Advance Big Data Applications (BD Spokes)
<input type="radio"/>	NSF 16-511	EPSCoR Research Infrastructure Improvement Program: Track-2 Focused EPSCoR Collaborations (RII Track-2 FEC)
<input type="radio"/>	NSF 16-518	NSF/CASIS Collaboration on Fluid Dynamics Research on the International Space Station to Benefit Life on Earth
<input type="radio"/>	NSF 16-529	Petascale Computing Resource Allocations (PRAC)

Show 10

Showing 1 to 10 of 46

« < PREV 1 2 3 4 5 NEXT > »

Previous

Next

• Indicator shows setup process steps

• Search feature enables faster ID of funding opportunity

• Only “live” funding opportunities are available

## Create New Proposal

1. Funding Opportunity

2. Division / Program

3. Submission Type & Funding

4. Title & Collaborative Info

### Select Program(s)

**Funding Opportunity:** Supporting Faculty in Quantitative Undergraduate Biology Education and Synthesis (QUBES)

**Division:** Integrative Organismal Systems

Select Program 

Activation

[+ Select additional program](#)

- In cases where there are multiple divisions/programs, user makes choice

Previous

Next



# Create New Proposal

1. Funding Opportunity

2. Division / Program

3. Submission Type & Funding

4. Title & Collaborative Info

## Select Submission Type and Funding

### What would you like to prepare?

- Letter of Intent
- Preliminary Proposal
- Full Proposal
- Full Proposal related to a Preliminary Proposal
- Renewal
- Accomplishment Based Renewal

### What funding mechanism will be used? ?

- Research
- Conferences
- EAGER
- Equipment
- Facility / Center
- Fellowship
- Ideas Lab
- International Travel
- RAPID

• User chooses relevant submission type and funding mechanism

Previous

Next

# Create New Proposal

1. Funding Opportunity

2. Division / Program

3. Submission Type & Funding

4. Title & Collaborative Info

## Proposal Title & Collaborative Information

### Proposal Title

### Is this proposal collaborative?

- Yes, a collaborative proposal from one organization ([GPG II.D.4.a](#))
- Yes, a lead collaborator for a proposal from multiple organizations ([GPG II.D.4.b](#))
- Yes, a non-lead collaborator for a proposal from multiple organizations ([GPG II.D.4.b](#))
- No, not a collaborative proposal

- User provides proposal title and indicates collaborative status

Previous

Create Proposal

Navigation Link 1

Navigation Link 2

Navigation Link 3

Home > Proposal Preparation > Create New Proposal

## Create New Proposal

1. Funding Opportunity

2. Division / Program

3. Submission Type & Funding

4. Title & Collaborative Info

### Proposal Title & Collaborative Information

Proposal Title

Your proposal interface and compliance rules are being customized based on your responses...

Is this proposal collaborative?

- Yes, a collaborative proposal from one organization (GPG II.D.4.a)
- Yes, a lead collaborator for a proposal from multiple organizations (GPG II.D.4.b)
- Yes, a non-lead collaborator for a proposal from multiple organizations (GPG II.D.4.b)
- No, not a collaborative proposal

- After providing setup data, PSM will customize the proposal interface and rules

Previous

Create Proposal

## Full Proposal - 7654321

Title: Supporting Faculty in Quantitative Undergraduate Biology Education and Synthesis (QUBES) [Change]

Funding Opportunity: NSF 16-505 - Division of Integrative Organismal Systems [Change]

Division: Integrative Organismal Systems [Change] Programs: Activation, Animal Behavior, Modulation [Change]

Funding: Research [Change] Collaborative: Lead [Change]

### Proposal Actions

Allow SPO Access

Check Proposal Compliance

Print Proposal

Invite Collaborators

Add/Delete Non Co-PI Senior Personnel

Delete Proposal

### Helpful Links

[View submitted proposals](#)

[Contact IT Help Central](#)

[Grant Proposal Guide](#)

Proposal Sections	Status	Last Updated	Compliance Status
-------------------	--------	--------------	-------------------

### Core Proposal Sections

<a href="#">Submitting Organization</a>	<input type="radio"/> Not started		Not checked
<a href="#">Senior Personnel</a>	<input type="radio"/> Not started		Not checked
<a href="#">Additional Proposal Information <sup>i</sup></a>	<input type="radio"/> Not started		Not checked
<a href="#">Project Summary</a>	<input type="radio"/> Not started		Not checked
<a href="#">Project Description</a>	<input type="radio"/> Not started		Not checked
<a href="#">References Cited</a>	<input type="radio"/> Not started		Not checked
<a href="#">Budgets</a>	<input type="radio"/> Not started		Not checked
<a href="#">Budget Justification</a>	<input type="radio"/> Not started		Not checked
<a href="#">Facilities, Equipment, and Other Resources</a>	<input type="radio"/> Not started		Not checked
<a href="#">Data Management Plan</a>	<input type="radio"/> Not started		Not checked
<a href="#">* Collaborators &amp; Other Affiliations</a>	<input type="radio"/> Not started		Not checked

### Supplementary Documents <sup>?</sup>

<a href="#">Postdoctoral Mentoring Plan <sup>i</sup></a>	<input type="radio"/> Not started		Not checked
<a href="#">Letters of Support</a>	<input type="radio"/> Not started		Not checked
<a href="#">Collaboration Plan</a>	<input type="radio"/> Not started		Not checked

- Proposal setup details may be adjusted, if needed

- Reorganized forms and indicators aim to show proposal progress

- Proposal actions are contained within this main proposal page

# PSM Questions and Feedback

- Time at the end of this meeting for Q&A
- Brief PSM-specific survey will be available for you to provide additional feedback and to volunteer for other PSM usability activities

# 2016 Notional Event Timeline (Subject to change)



# Next Steps

Survey

[Forum Feedback survey:](#)

[https://www.surveymonkey.com/r/NSF\\_ElectronicResearchAdmin\\_Forum](https://www.surveymonkey.com/r/NSF_ElectronicResearchAdmin_Forum)  
PSM-specific survey will be emailed to forum registrants

Email

[nsferaforum@nsf.gov](mailto:nsferaforum@nsf.gov)

Listserv

[NSF-ERA-FORUM@listserv.nsf.gov](mailto:NSF-ERA-FORUM@listserv.nsf.gov)

NSF ERA Forum  
website

[https://www.nsf.gov/bfa/dias/policy/era\\_forum.jsp](https://www.nsf.gov/bfa/dias/policy/era_forum.jsp)

**Q&A**