

Executive Summary of XSEDE Advisory Board Meeting, April 16, 2021

Meeting Date: Friday, April 16, 2021

Meeting Place: 3 hour Teleconference via Zoom

Preface: The main topic of this call was to serve as the annual in-person meeting

Next Call: Friday, July 9, 2021

Approval of February Meeting Minutes

- Approved

Session I: PI Update

- Forward funded through the end of the project. Helpful because we only need authorization to spend. Will be working to get final year funding out to subs following review.
- Good interactions with Bob C & Al S at NSF.
- Concern that ACCESS awards won't be made before the end of XSEDE funding. NSF has committed to making awards in FY22. XSEDE ends in FY22 (Aug). Concern about what will happen if awards aren't made before the end of XSEDE. XSEDE has already received 20% of initial funding for PY11 so would need a more extensive review to approve any additional funds. Worried about the impact of transition on the community. Prefer to not write a bridge proposal, but we will do it if needed.
- Q: Not surprised you're not getting more info from NSF. Worry only about what you have to worry about. Certain things that the new award will not support because of budget. What will need to drop?
 - 2 major areas missing from solicitations: ECSS (accounts for 1/3 of current XSEDE budget); CEE is largely missing with exception of some campus outreach activities. These are high risk areas. Concern that XSEDE staff will leave early to seek other career opportunities. Trying to figure out how to manage these risks.
- Q: Asking for guidance on mitigation plans is reasonable. RECOMMENDATION: Consider developing transition plans for overlap with ACCESS vs. no overlap. Remind NSF that we could likely lose staff. May not get any response, but important to remind them of what could be lost as time gets closer.

- Q: They're not giving priority to community needs. Could be a huge disruption for some projects. Abandoning that due to lack of planning isn't responsible. Don't know if they'll listen to this, but it is an angle worth pursuing
- JT: The nature of governance of ACCESS awards is a challenge. A lot of open questions in solicitations re. which track should do what. As awards are made, there will be reconciliation about who is doing what. Will be hard for XSEDE to engage with them until such decisions are made. Feel that what I'm saying is being heard but nothing is being done about it. Blueprint docs have potential for efforts to be continued under other programs (ie, workforce development). Don't see anything targeted at providing ECSS support.
- JT: Working now to identify the latest date we could spin things down if we don't have anyone to hand off to, point of no return when service can't be spun back up, amount of effort needed if we had to stand back up after the point of no return date.
- Q: Can't rule out the possibility that NSF doesn't have answers to any of this.
 - If they do, we aren't hearing about it.
 - Q: NSF can't speak about future programs. Can't commit to award dates. Maximum possible gap is 30 days. Odds are that it will get done with some time to spare. No matter what they do with the gap, it won't fix issues with ECSS & CEE. Doubt they'll tell you anything else. 20% cap is per year. 2-3 scenarios you have to worry about & no amount of planning will change that. Important to work on things that are critical to bridge (allocations).
 - Timing issue with allocations. Question out to NSF on this.
 - Systems will continue past the end of the XSEDE award. In lack of a better plan, will keep allocating and new awardees have to take them.
 - Q: Experience with other agencies? DOE labs, NASA projects, etc.?
 - Q: have been a part of NIH, but they have a different process/scenario.
 - Q: Believe NSF is aware of issues. Until final approval they aren't allowed to say anything. Spend our time productively planning, don't worry about things we have no control over.

Session II: [CEE PY11 Plan](#) Discussion

- People intensive, relationship building, sustainable relationship pieces are missing from solicitations. Noticed several years ago with review panels there is a mentality that when you get some success, and feel you have a process for success, that you can replicate it & drop it. That is not how this works. A lot of research suggests that single engagements without relationships aren't successful & don't result in as good of outcomes. An unwillingness to put money into investment in a persistent relationship.
- Much of CEE is not in ACCESS solicitations. User engagement/user services (portal & some training) is there and a small amount of campus engagement. Everything else is gone. Not enough \$ to support those things. CEE started as a grassroots effort, and built something successful from nothing. Took a lot of dedication. Disappointing that it wasn't acknowledged. Don't know where the value proposition is getting lost. The women & people of color needle hasn't shifted like we thought it would. CEE has had a lot of success at bringing these underrepresented groups in. Concern that the value proposition isn't getting adequately communicated.
- Q: Are there other NSF programs (division of undergrad education etc.) that could apply and get funding to continue programs?
 - We can. Have leveraged funding from a variety of NSF programs. They tend to be smaller pots of funds. Will definitely apply for funds to continue, but they generally aren't funded at the needed level. Didn't start from zero. Built on relationships that Linda Akli & others had already built.
 - Have talked about pursuing an institute/funding outside NSF to grow these programs.
- Q: CI centers of excellence. Any signals from NSF that this may be a vehicle to put effort in? White papers to propose centers of excellence that could build on these programs?
 - JT: May start to see several small awards, which could lose the coherence.
 - Kelly: putting a white paper together now to submit to the center of excellence. Most logical path forward at least initially. No feedback from NSF that this is where we should go, but plan to test the waters.
 - Phil: ECSS plans to do the same.
- Q: How do we better communicate that it is persistence/relationships/investment over time that equals success?
 - Q: User stories are very powerful, especially with underrepresented communities.
 - We do have anecdotal stories & data collected for all programs. Follow participants so we can build these stories.
 - Q: How about documentation to show paths to success
 - Q: write papers

- Kelly: putting together journal publication. Just now have enough data to do this.
 - Q: Is there any way to measure persistence?
 - Our persistent engagement over time. Our level of engagement with participants over time.
 - Lizanne: we track this over time, but it is a limited sample.
 - Leverage other programs to provide a richer experience. May start as REU site and end up in Computing4Change etc.
 - Need to find venues to communicate about this success
 - Q: how much of the problem is a result of the story not being matched with what the recipients are interested in? So much focus on technical aspects, more performance, bigger storage, etc., results in a mismatch of message you're trying to convey and people receiving the message.
 - Reviews of CEE & ECSS have been glowing. So surprising that they weren't prioritized.
 - Have had feedback that we only impact 25 students at a time vs. hundreds. But we generally impact these people for a long period of time and shift where they end up. NSF seems to be looking for short bursts & big numbers.
- CEE stepping back on some URM KPIs. Might reconsider that.
 - Not backing off on program but on target. Have seen significant Zoom fatigue in these communities. Difficult to reach out to new communities in online format. Uncertainty due to online/no travel.
 - New admin pushing forward bill that will include workforce development for underrepresented communities.

Session III: [ECSS PY11 Plan](#) Discussion

Reducing targets for the number of projects from 45 to 40. Typical project allocated for 1 year. Plan to accept new ECSS projects through March (will have 6 mos to complete). Will talk to PIs re. expectations, that we'll need to work on things that can be completed in 6 mos.

Other targets are related to satisfaction, so those are not being changed.

- Q: provide additional compensation as a way to keep them from leaving before the end of XSEDE?
 - Constrained by budget and local sites.
 - People moving is driven more by opportunities/interest than money

- Relates to training issues as well. Continued training is a perk to staff to get that professional development. Still have a need with new machines coming on board to remain effective up to the end.
- If people leave and others have to step in, training can provide agility for this.
- Q: What are you hearing from the user community re. ECSS going away?
 - A Campus Champion was very upset about this. Most users are unaware.
 - Considering a BoF or panel at PEARC21 to ask the community about what ECSS should do next.
 - Some feedback from SP forum as they rely on ECSS to provide in-depth expert support that the SPs don't have the budget to offer. SP Forum sent a letter with concerns about this, but the response was just thank you for your feedback.
 - When do we tell the user community? Don't want to create uncertainty, but they need to know this won't be an option. There will come a time when ECSS won't be on XRAS menu, so we need to announce before that.
 - Dave H: Some projects could write into their own awards/grants. Consider timing needs for that. May need to announce earlier than later.
 - RECOMMENDATION: Across various program areas of XSEDE, think about overall communication strategy for all transition efforts across the project. Recommend developing a unified communication plan with milestones for next year.
 - UAC's take on this? Majority of users don't use ECSS, so many of them may not have this on their radar. Small % of audience but has a big impact.
- Smooth transition from having ECSS to not having ECSS.
- ECSS has its hand in other activities including Novel & innovative projects and working with CEE to develop & deliver training.
- May have staff effort become available as ECSS ramps down. Consider having them shift to engage in other activities.

Session IV: [XCI PY11 Plan](#) Discussion

When to stop onboarding new SPs? Not a simple process (3-6 mos to complete).

- Hope to have reasonable transition overlap.
- Final XRAC is a couple days before the end of the project. Would you introduce new resources then? Count back from there. If you don't have sufficient time to make it an allocated resource, no point.
- From SP point of view, requirement in cooperative agreement to integrate into XSEDE

- Integration with allocation portion can be lighter weight. To put in system to make an award is less difficult than fully integrating with AMIE/accounting.
- No calls out for new L1 systems, so unlikely there will be any new ones we don't already know about.
- Why not continue support as long as there is funding?
 - No indication if ACCESS awardees will want to take ownership of all services

How to handle pilot efforts

- If you get to that point and they've not gone into production

What gets retired first etc.

- Based on usage. If no one is using it, retire it.
- What is the effort towards just keeping the lights on for XCI? If there is a gap...
 - 4-5 services @ about .5 FTE each
 - Keeping up to date on bug fixes/security
 - Would have to work with sys ops group as they manage the hardware that these services are run on.
- RECOMMENDATION: Determine the effort needed to keep XCI basic services running in case there is a gap.
- RECOMMENDATION: To gauge impact on users, have conversations with users. Even if usage is low, impact can be high.

When should engagements end?

- Dependent on effort, but 6 mos is rough timeline
- RECOMMENDATION: assess in advance which engagements could be done quickly so could be taken on later vs. those that are more extensive so need to be cut off sooner. Evaluate how much effort is involved and schedule accordingly
 - A shame to lose quick jobs due to a hard deadline
- A way to add to the process to ask if willing/able to put in staff time in the next x months.

Session V: [Ops PY11 Plan](#) Discussion

Concern is that we don't know what we're transitioning to or when. Have to be ready for anything. Not clear if the collection of ACCESS tracks will cover all services we currently offer. If competing visions and multiple tracks want to claim the same service, how to handle that. What happens if ACCESS uses something very different from what we're currently doing--difficult to transition.

- Planning now for spinning services down.
- How impossible to start services back up once taken down.
 - External dependencies/penalties in contracts
 - Cost in the back of our minds, but impact is at the forefront
- Planning for contingencies as best we can.
- Have migrated many services to cloud providers, and that should make things easier.
- Any indication re. how diverse a potential service model is that future ACCESS operators might envision?
 - Operations track is not the only place that current Ops services will live in ACCESS. Some of this is implicit, so proposers could read it in different ways. Will need a reconciliation process to ensure all tracks coordinate with NSF to agree who is doing which services. Hope this is resolved before the end of XSEDE to allow us easier transition services.
- XSEDE has had no contact from anyone asking questions about transition planning

Session VI: [RAS PY11 Plan](#) Discussion

Allocating enough time to send award notices after the last XRAC meeting?

- Will be tight, but can put staff on this to be done by Aug 30. Moving the meeting up a week would help.
- XSEDE's data preservation requirements? If we need to take a snapshot of XDCDB and store it somewhere, that could impact the timeline.
- Recommend moving the final XRAC meeting back a week to allow more time to make the allocations.

If you shut down pieces of XRAS can you bring back later?

- Have to shut down the submission interface. Closed for business screen, disconnect from API. Can do that at any time. Can shut down the review interface. Most abrupt would be to spin down services running in Amazon and go dark. Have stages/phases we can do.
- "If we end up working into Sept to get the work done then that's what we'll do" spirit--appreciate that but it's not right. Can't use project funds to pay for it past

the end date. Don't want to take advantage of subawards who have performed well.

- Can adjust the level of effort for writing comments. All declines could get a stock "Your request is declined. Due to the end of XSEDE no other comments will be provided." Can also work with SPs to provide them the allocation info & they do with it what they will.

Opportunities with new SPs

- New sites including some brand new and others coming back. How can we take advantage? Can we benefit the user community or SPs?
 - Might promote that we have new resources coming online at a higher level to ensure awareness among user community
 - ER has been working on this with RAS & XCI.
 - Getting user base started for new resources can help community and SPs

Session VII: [Program Office PY11 Plan](#) Discussion

Should the project compile a formal lessons learned doc? Not specified as a formal deliverable. Especially given the structure of ACCESS awards being so different.

- Q: RECOMMENDATION: the project should write a lessons learned paper and publish it
- Q: There is disappointment with the move to multiple tracks. Pendulum may eventually swing back, so having documentation of best practices could be helpful if NSF course-corrects in the future.
- JT: all documents XSEDE produces are published publicly in our doc repository. Includes persistent identifiers, and will continue to exist after the end of the project.
- Appropriate place to publish? Peer reviewed pubs

Communications plan: Want to be sure the community knows where to go to get services that will continue etc.

- RECOMMENDATION: The project should promote the new awards & where users can expect to continue to access services they've had through XSEDE. Would need agreement with new teams. May wait for the new portal to be stood up. Letting the community know that XSEDE allocations will continue to be honored would provide comfort.
- Right thing to do for users and the next project. Want to be supportive of the next project.
- Difference in publicizing and having clear communication for the benefit of the community.

- Offering coordinating office to take over the domain for awhile might be beneficial

User survey/climate study

- Getting the final year of data would be very valuable & feed into lessons learned.

Wrap-up/Close Meeting

Thank you to all XAB members for input/feedback. Appreciate the time and effort.

This structure of just putting up the questions was much more effective and beneficial.

Need to consider the structure for XAB meetings in 2022. ACTION: Will put this on a future meeting agenda.

Motion to close: Emre/Dan

Next meeting: Friday, July 9 12-1pm CT

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