

## Proposed Final Reporting Plan for XSEDE 2.0

This final report schedule is intended to allow for

- complete reporting of all project metrics and related data
- a schedule that allows for timely submission of reports and data
- work to prepare and submit final reports to be supported by grant funds

NOTE: This schedule assumes the request for a limited no cost extension to cover the efforts of XSEDE staff after Aug 31, 2022 to complete preparation and submission of reports, prepare and submit manuscripts for publication, and to close out all financial aspects of the project. NSF will need to accept and approve that request for this plan to move forward.

### Report Schedule

Report	Period Covered	Due Date	Notes
<b>IPR16</b>	Aug. 1- Oct. 31, 2021	Nov 18, 2021	Regular IPR
<b>IPR17</b>	Nov. 1, 2021- Jan. 31, 2022	Feb 17, 2022	Regular IPR
<b>RY6 Annual Report</b>	Feb. 1- Apr. 30, 2022	May 19, 2022	Regular Annual Report but no Program Plan
<b>IPR18</b>	May 1- July 31, 2022	Aug 18, 2022	Added this IPR.
<b>IPR19</b>	Sep 1, 2016 - Aug 31, 2022	Sep 30, 2022	Added this IPR. This will be a comprehensive reporting on project metrics through the end of the operational period of the project. It will also report on lessons learned and best known practices determined by the project during its execution. An outline for this report is below.
<b>Final Report:</b>		August 31, 2023	This will focus on final reporting on longitudinal analysis and related impact studies.

How does this change the original plan?

- Added IPR18 to cover normal reporting through July 2022
- IPR19 will focus on two areas of reporting. First, it will cover analysis of complete reporting of metrics for the operational period of the project. Second, it will also focus on lessons learned and best (known) practices. The metrics appendix will have a full accounting of metrics for the lifetime of the project.

- Final Report: This will provide final analysis for longitudinal studies, ROI, etc. It will include IPR19 as an appendix to provide a complete reporting in a single document to NSF.

## Report Contents: IPR18

Though an addition to the reporting schedule, the intent here is to provide a close-to-typical IPR that allows the project to report on metrics and data collected during the period May 1- July 31, 2022.

Since our metrics often have annual targets, we may need to provide some targets for this reporting period.

## Report Contents: IPR19 - Project Metrics and Lessons Learned

This report is intended to focus on (a) final metric reporting with trend analysis, and (b) lessons learned and best (known) practices. There will be an appendix to report the complete metrics reporting for the project operational lifetime ending Aug 31, 2022. Note that for many SP resource-oriented metrics that we regularly report are reported on calendar quarter boundaries and thus we will provide partial calendar quarter numbers for those metrics.

### Section 1: Introduction

Primarily standard intro language from our reports, adjusted for this being a final report on metrics. Summarize some high-level final metrics for XSEDE, particularly KPIs. This would not have typical Section 1.1 and 1.2.

#### Section 1.1: Strategic Goals and KPI Summary

Statement of strategic goals and project level summary of KPIs.

#### Section 1.2: Summary and Highlights of Operational Period

Overall summary of the operational period of the project with highlights. Similar to prior reports but covering the entire operational period of the project.

### Section 2: Science Case and Science Impact

#### Section 2.1: Foundational Motivation for XSEDE

We have text along these lines. Include for completeness

#### Section 2.2: Science Impact

High level summary of science impact of XSEDE 2.0. Bullet list of significant science successes.

### Section 3: Discussion of Strategic Goals and Key Performance Indicators

This is much like the prior reports but will discuss trends and findings for the operational period of XSEDE2. Keep WBS-specific items for later sections consistent with prior reports.

### Section 4: Community Engagement and Enrichment (CEE)

Follows prior reporting template. Summary of CEE (a few paragraphs); provide summary area metrics table and briefly discuss trends and findings for the operational period of XSEDE2.

#### Sections 4.1.x CEE WBS Areas 2.1.1 through 2.1.6

Follows prior reporting template. Summary of WBS area; summary of activities and successes over the operational period of XSEDE2.

### Section 5: Extended Collaborative Support Services (ECSS)

Follows prior reporting template. Summary of ECSS (a few paragraphs); provide summary area metrics table and briefly discuss trends and findings for the operational period of XSEDE2.

#### Sections 5.1.x CEE WBS Areas 2.2.1 through 2.2.6

Follows prior reporting template. Summary of WBS area; summary of activities and successes over the operational period of XSEDE2.

### Section 6: XSEDE Cyberinfrastructure Integration (XCI)

Follows prior reporting template. Summary of XCI (a few paragraphs); provide summary area metrics table and briefly discuss trends and findings for the operational period of XSEDE2.

#### Sections 6.1.x XCI WBS Areas 2.3.1 through 2.3.3

Follows prior reporting template. Summary of WBS area; summary of activities and successes over the operational period of XSEDE2.

### Section 7: XSEDE Operations

Follows prior reporting template. Summary of XSEDE Operations (a few paragraphs); provide summary area metrics table and briefly discuss trends and findings for the operational period of XSEDE2.

#### Sections 7.1.x XCI WBS Areas 2.4.1 through 2.4.5

Follows prior reporting template. Summary of WBS area; summary of activities and successes over the operational period of XSEDE2.

## Section 8: Resource Allocation Service (RAS)

Follows prior reporting template. Summary of RAS (a few paragraphs); provide summary area metrics table and briefly discuss trends and findings for the operational period of XSEDE2.

### Sections 8.1.x XCI WBS Areas 2.5.1 through 2.5.3

Follows prior reporting template. Summary of WBS area; summary of activities and successes over the operational period of XSEDE2.

## Section 9: Program Office

Follows prior reporting template. Summary of Program Office (a few paragraphs); provide summary area metrics table and briefly discuss trends and findings for the operational period of XSEDE2.

### Sections 9.1.x XCI WBS Areas 2.6.1 through 2.6.5

Follows prior reporting template. Summary of WBS area; summary of activities and successes over the operational period of XSEDE2.

## Section 10: Lessons Learned and Best (Known) Practices

*[Note: It is anticipated this section will be released to the community as a stand-alone document.]*

### Section 10.1: Introduction

Primarily standard intro language from our reports, adjusted for this being a final report on lessons learned and identified best (known) practices.

#### Section 10.1.1 Project Level Lessons Learned and Best (Known) Practices

High level items in this section; WBS-specific items in subsequent sections.

#### Section 10.2: CEE Lessons Learned and Best (Known) Practices

Brief description of L2 area (including L3 areas) followed by lessons learned and identified best (known) practices.

#### Section 10.3: ECSS Lessons Learned and Best (Known) Practices

Brief description of L2 area (including L3 areas) followed by lessons learned and identified best (known) practices.

#### Section 10.4: XCI Lessons Learned and Best (Known) Practices

Brief description of L2 area (including L3 areas) followed by lessons learned and identified best (known) practices.

Section 10.5: XSEDE Operations Lessons Learned and Best (Known) Practices

Brief description of L2 area (including L3 areas) followed by lessons learned and identified best (known) practices.

Section 10.6: RAS Lessons Learned and Best (Known) Practices

Brief description of L2 area (including L3 areas) followed by lessons learned and identified best (known) practices.

Section 10.7: XSEDE Program Office Lessons Learned and Best (Known) Practices

Brief description of L2 area (including L3 areas) followed by lessons learned and identified best (known) practices.

Appendix A: Glossary and Acronyms

Standard list from our reports

Appendix C: XSEDE 2.0 Final Metrics Reporting

Provide final metrics report. Should include all 6 years but only to project year granularity.

## Report Contents: XSEDE 2.0 Final Report

[Still being refined]

Potential elements might include (for discussion):

- XSEDE -> ACCESS transition
- Intellectual merit and broader impacts summaries for XSEDE over the life of the award
- a piece on transition from research to practice
- How has XSEDE adopted commodity services to improve services and cost-effectiveness?

### Section 1: Introduction

Primarily standard intro language from our reports, adjusted for this being a final report.

Summarize some high-level final metrics for XSEDE, particularly KPIs. This would not have typical Section 1.1 and 1.2.

#### Section 1.1: Project Level Impact Analysis

Project level summary of findings from longitudinal studies, ROI analysis, ect., as relevant. Keep WBS-specific items for later sections.

## Section 2: Science Case and Science Impact

*[NOTE: This is a repeat of Section 2 from IPR19.]*

### Section 2.1: Foundational Motivation for XSEDE

We have text along these lines. Include for completeness

### Section 2.2: Science Impact

High level summary of science impact of XSEDE 2.0. Bullet list of significant science successes.

## Section 3: Longitudinal Studies

Discussion of longitudinal studies

Discussion of impacts

## Section 4: ROI Analysis

Discussion of ROI analysis

Discussion of Impacts

## Section 5: IRIS Studies

Discussion of studies conducted by IRIS

Discussion of impacts.

## Section 6: XSEDE to ACCESS Transition

Summary of transition activities and experiences.

## Section 7: Project Outcomes Report for the General Public

[The Project Outcomes Report should serve as a brief summary (200-800 words), prepared specifically for the public, of the nature and outcomes of the project. The report should describe the project outcomes or findings that address the intellectual merit and broader impacts of the work as defined in the NSF merit review criteria.]

The POR does not need to contain publications resulting from the award as NSF automatically includes publications that are provided as part of the annual and final project reports as part of

Research.gov's Research Spending and Results. The report should contain information about products that have resulted from the award such as collections, data sets, software and educational materials. Additional information on the report contents can be found in the Proposal and Award Policies and Procedures Guide [Award and Administration Guide, Chapter II.E.3.](#)