20211201- Final Reporting Plan

Decisions:

Summary	Description
IPR18	IPR18 to go in in Sept & cover May 1-Aug 31, 2022. • Include lessons learned for all of XSEDE2 as appendix so this doc can be shared with the community separately • Include all metrics data. • Include trend analysis • Will work on lessons learned etc. throughout 2022 so as much of the doc as possible is complete by Aug 31, 2022
IPR19	IPR19 submitted in Dec or Jan. Could include: • Some analysis • Info on transition experience (if possible) • Final financials
Final Report	• Final report to come sometime in 2023 would have last of longitudinal studies, ROI. • When that is submitted, IPR18 & IPR19 to be attached for completion.
Longitudinal studies plan	LS data collection will go through Aug 31, 2022. Need full year after that for analysis and production of pubs. Will release reports as they become available for the community. Full report to be included in Final Report in 2023.
ROI	Due to Intersect360 work, ROI would like to have full year for analysis and production of pubs.
Transition	John planning based on assumptions that operational aspects of XSEDE will finish Aug 31 2022. Presumes that any transition efforts are complete by that time and ACCESS takes over.
Reporting plan to NSF	John will submit reporting plan to NSF before holiday break. NCE request to go to them in Jan/Feb.
PEARC23 & IHPCSS23 eval	If funds are available, would like to support these evaluations. Lizanne to provide budgets so project can assess availability of funds.

Action Items:

Summary	Description	Responsible	Due Date
12-mo budget for ROI	Winona will provide 12-mo budget for IU Ron to work with Craig to get a 12 mo budget for NCSA	(Not tagging anyone since I included this on the NCE action page)	
Budget for shutting down financials ⚠ QMA-508 - Jira project doesn't exist or you don't have permission to view it.	Ron will provide a budget for what is needed to shut down financials	Ron Payne	
Final scientific impact metrics analysis for IPR18 ⚠ QMA-509 - Jira project doesn't exist or you don't have permission to view it.	Need to reach out to Gregor & Fugang to discuss this	Leslie Froeschl	
Eval team input for final report structure ⚠ QMA-510 - Jira project doesn't exist or you don't have permission to view it.	The evaluation team should provide John with input on the preferred outline/structure for the final report	Lizanne DeStefano	

IPR18 outline	John to rework the IPR18 outline and share proposed final reporting plan with Bob & Al before the holidays	John Towns	
⚠ QMA-511 - Jira project doesn't exist or you don't have permission to view it.			

Notes/ Discussion items:

- John shared final report draft: https://docs.google.com/document/d/1W0eRifDa1SqQF6FJCf4-T_9zZiPhLBdQqo3BeXKt9GE/edit.
- Want to minimize number of docs we send
- Want to release people at end of project as much as possible.
- Do away with final report part 1. IPR18 to go in in Sept & cover May 1-Aug 31, 2022. Plus reporting for entire XSEDE2 period.
  - Include lessons learned for all of XSEDE2.
  - Include all metrics data.
  - Include trend analysis–will need to review this.
  - Preliminary impact analysis & lessons learned could be separated to allow us to share them independently of the full report.
    - See value in having lessons learned separate that could be released to the community. Citable title/persistent handle. Could be in the report as an appendix. This can be finished early. PM&R to schedule this.
- IPR19 might cover some analysis work & be submitted in Dec or Jan.
  - Could include transition experience (if possible)
  - Final financials
- Final report to come sometime in 2023 would have last of longitudinal studies & related.
  - When that is submitted, IPR18 & IPR19 to be attached for completion.
- Purpose is that project can only submit one final report. NSF doesn't tend to look at IPRs, so by attaching to final report they would see the full package.
- How long will Longitudinal studies & ROI actually take? If take too long will be less timely.
  - LS: would like as much time as possible. Like to run data collection through 8/31/22. Having one year would be ideal. Will issue things as they're done. Goal to get very final finished product (book chapters, articles, etc.). Regular work also continuing in 2022. Can prob have everything prepared in early 2023, but to have it ready for publication will take longer.
    - Type of writing for this is different from normal NSF audience. Broader, more general audience.
    - Will produce lessons learned etc. more quickly, but having people to do the final report will be important.
    - Can truncate data collection in Dec. 2021 and take the next year to analyze data. But cost to this because we won't see final year of impact.
      - Would miss all of student programs that start in spring 2022.
      - Agree that we need data through Aug 2022. Don't want to miss data from final year.
  - ROI:
    - Strongly advocate to continue beyond Dec. 2022. Intersect 360 work: higher quality work would be produced if more time is allowed.
    - Need updated projection for when the analysis can be done.
    - Will come out of unspent funds, and longer we engage in work the more of the unspent funds will need to be used. Need to understand how long is actually needed and what the budget will be.
    - Winona Snapp-Childsto provide updated 12-month budget.
    - Ron Payneto follow up with Craig for 12-month budget for NCSA.
- Metrics:
  - Trend analysis to be included in IPR18 at end of Sept. Would involve 1 month more time for folks involved in that.
- Shutting down financials
  - Ron Payneto produce budget
- Where will transition be covered? Will funding be used to cover this if a late transition?
  - John planning based on assumptions that operational aspects of XSEDE will finish Aug 31 2022. Presumes that any transition efforts are complete by that time and ACCESS takes over. (Could be a false assumption)
  - Unless transition is part of contract, carryover should not be used for new work. Transition would be considered new work.
  - Reasonable chance there could be costed extension to support transition. No way to know.
- If awarded, NSF will award the No cost extension for one year. If we finish early, it's fine. Question is how much of the time do we want to plan to use
- Give NSF reporting plan before holiday break. NCE to go in Jan/Feb.
- Want to get any publications/info out to the community as early as available.
  - PEARC23 could be a good place disseminate a lot of this to the community
- Eval of PEARC23 & IHPCSS23? Have told them eval team can not do those unless they have other funding.
  - Would like to support them. If we have budget and capacity to do that, would like to, but don't want get in the way of getting the final report done.
    - Would have capacity
    - PEARC could prob come up with the funds, but IHPCSS would struggle.
    - Lizanne DeStefanoto provide a budget for both of these. Need to talk to Bob S about this.
- Do we want to continue collecting user publications during NCE year? Could collect final reports for allocations that started under XSEDE.
  - Would have to leave portal and some bits of XRAS up to do this. Minor operational costs.
  - Any licensing costs to consider?
  - End of life issue for Liferay. Kerberos. Etc.
  - Like to have the data.
  - How practical this is would depend on ACCESS. If whole new set of people running this, could have to go to a completely different place to upload this info. Could possibly get data from ACCESS. Going to have to wait and see.
  - Publications–lose ability to link pub to allocation award. Could establish link between allocation & online place where the pub is posted. Would require more development work.

- Contracted with Gregor & Fugang to do 4 reports in PY11. Could ask for final analysis from them for IPR18 (unless something deeper they want to do). Leslie Froeschl to reach out to Gregor to set up meeting to discuss
- Input needed from eval team for Final Report draft.
- Science impact: "Bullet list of significant science successes." (section 2.2) in final report draft
    - Dena working on science highlights for next year to be summary over life of award. (Science Highlights on steroids). cover broader period of time. Could link to that. Can summarize stories in there and point to that.
    - Can also point to old IPRs (in IDEAL)
- No program plan in 2022? May need to talk to Bob about this. He may want a program plan if we request 1-year extension.
    - Don't think it will be necessary because NCE will lay out the plan. Will be far reduced scope as we will only be focusing on spin-down and reporting.
    - No NSF review in 2022.
- John to redo outline for IPR18.
- Eval team to provide input for final report outline.