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
Speakers

Erika Rissi
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Jeff Vieceli
Head, Systems Office, Division of Institution and Award Support

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Project Manager, Division of Information Systems

Office of Budget, Finance and Award Management (BFA)

Office of Information & Resource Management
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**

<table>
<thead>
<tr>
<th>Participation and engagement</th>
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<tr>
<td>Please use the chat feature to engage in our forum today</td>
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<tr>
<td>Submit questions, feedback and topics of interest via:</td>
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<td>• Emails</td>
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<td>• Listserv</td>
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<td>• Survey</td>
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<th>Future events and related items</th>
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<td>Agile approach</td>
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<td>Frequency</td>
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<td>Feedback</td>
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<td>Topics of Interest</td>
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Chat Feature and related items

- 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:

- Ease of Use: 33.3%
- Webpage Layout not Intuitive: 40%
- Administrative Burden: 25%
- SPO Burden: 10%

Suggestions for potential solutions:

- Data Pre-population: 60%
- Just-in-Time Proposal Submission: 55%
- Revision of NSF solicitations: 55%
- Expanded Compliance Checking: 75%
- SPO Burden: 80%
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

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<tr>
<th>Identify Pain Points and Draft Improvements</th>
<th>Review Concepts with NSF Staff Working Group</th>
<th>Review Wireframes with External Users</th>
<th>Internal Validation and Execution</th>
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<tr>
<td>• Leverage helpdesk, PSM survey, etc. to identify improvement opportunities and create initial concepts/mockups</td>
<td>• Review initial concepts and discuss at Working Group sessions</td>
<td>• Present and test wireframes with external users to validate and refine</td>
<td>• Brief Working Group, elevate/resolve issues and begin development</td>
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<td>• Refine as needed</td>
<td>• Usability sessions, Forum, etc.</td>
<td>• Deliver enhancements incrementally</td>
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Tailoring the Proposal Interface: Demonstration
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.

Help text provides upfront clarification of information needed to setup the proposal.
- Indicator shows setup process steps
- Search feature enables faster ID of funding opportunity
- Only “live” funding opportunities are available
In cases where there are multiple divisions/programs, user makes choice.
- User chooses relevant submission type and funding mechanism
• User provides proposal title and indicates collaborative status
After providing setup data, PSM will customize the proposal interface and rules.
Proposal setup details may be adjusted, if needed

Proposal actions are contained within this main proposal page

Reorganized forms and indicators aim to show proposal progress
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)

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Ongoing Activities: Usability Studies, Interviews, focus groups
## Next Steps

PSM-specific survey will be emailed to forum registrants |
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Q&A