

Metrics Dev - Goal 5

This document is intended for use during the September 2023 ACCESS Quarterly Meeting to begin the process of identifying goals associated with the ACCESS Program Wide Goals. For this document, the statement of the goal and associated objectives that have been identified thus far.

For this exercise, there are the following objectives:

- Review the goal and associated objectives
 - Ensure the objectives are clearly stated
 - Identify any additional objectives of the Program that support the goal and add them to the list below.
- Brainstorm on potential metrics associated with each objective.
 - Think broadly on this and suggest metrics that might be effective.
 - Where possible, indicate whether data is already being collected or could be collected to measure this metric.

The point of this is not to come to a final resolution on metrics. This is early in the process and the Evaluation WG/SC will take this as input and work to further develop and refine the metrics and to distill key performance indicators (KPIs). Below are also relevant definitions of terms we are using in this process.

Definitions:

- **Strategic Goals**: objectives that the organization will pursue that furthers the the organization's mission
- **Metrics**: Measure performance or progress for specific activities (operational or tactical)
- **KPIs**: Key performance indicators that provide clear indications as to whether the organization is making progress on its strategic goals (strategic)
- **Objectives**: Short term (1-3yr) efforts that advance the Strategic Goals; this is what one would include in annual plans.

Goal 5 and associated Objectives

- Democratizing access to advanced CI
 - **Goal 5: Extend the use of resources and services available via ACCESS to underrepresented communities, under resourced institutions, and non-traditional domains**
 - objectives that support the above statement
 - Broadening the use of CI resources by scholars, researchers, and engineers from non-R1s, MSIs, HBCUs, and under-resourced institutions.
 - Broadening the use of CI resources by researchers from non-traditional disciplines

Metrics Brainstorming

This is the working area for this breakout session. Below the Goal is listed and the objectives have been given separate lines in a table. As you review the goal and associated objectives, if there is clarification in the objectives, please provide tracked edits (please switch to “Suggestion” mode) or comments. If additional objectives are identified, add them to the table.

Note that for some of the objectives already identified, they consist of compound statements. For this exercise, we need to break down any such objectives into its elements and associate potential metrics with each. This has been done for the previously identified objectives, but will also need to be done for any new objectives the group identifies.

Once you have reviewed these and added any, then go through each of the objectives (or their elements) and brainstorm around metrics that might be appropriate to measure progress against each of them. Feel free to think out-of-the-box, but also try to assess whether we can collect the necessary data to make the measurement. In some cases we will already be collecting the data, in others we may clearly have the potential to do so, but are not currently, and in yet other cases it will not be clear whether we can collect the necessary data. Please indicate via the dropdown menu what the group believes is the state of our ability to measure the metric.

Goal 5: Extend the use of resources and services available via ACCESS to underrepresented communities, under resourced institutions, and non-traditional domains

- objectives that support the above statement
 - Broadening the use of CI resources by scholars, researchers, and engineers from non-R1s (based on Carnegie Classification research-mission level¹), MSIs, HBCUs, and under-resourced institutions.
 - Broadening the use of CI resources by researchers from non-traditional disciplines

Institutions

Potential General Metrics:

- Counts / stats on the institutions
- Counts / stats on the individuals
- Potential Barrier: need to strengthen descriptions of what we are doing with demographic data, so that users could potentially feel more comfortable to share their demographic data.
- Engaging with MSIs might be just as valuable as use

Note ‘MSI’ is an over-arching term for 7 different types of orgs:

¹ https://en.wikipedia.org/wiki/Minority-serving_institution

- HBCU
- PBI
- HSI
- TCU
- NANTI
- ANNHSI
- AANAPISI

Disciplines

Regarding 'disciplines', in Ohio we use this list:

*Fields of study are self-reported and classified based on "Revised Field of Science and Technology (FOS) Classification in The Frascati Manual" found here <https://www.oecd.org/science/inno/38235147.pdf>

Allocations uses the NSF list

Potential barrier: defining traditional vs. non-traditional

Trending data and looking for "more" over time

User data vs. allocation request data about discipline/domain

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Objective Elements	Potential Metrics	Data Availability
Broadening the use of CI resources by scholars, researchers, and engineers from non-R1s, MSIs, HBCUs, and under-resourced institutions		Uncertain as to data av... ▾
	Number of MSIs: HBCUs, Tribal Colleges,	Uncertain as to data av... ▾
	Allocations (usage) over time at MSIs	Data could be collected ▾
	Allocations (usage) over time at HBCUs	Uncertain as to data av... ▾
	Number of non R1s	Data could be collected ▾
Broadening the use of CI resources by researchers from non-traditional	Allocations (usage) over time at non R1s	Uncertain as to data av... ▾

Objective Elements	Potential Metrics	Data Availability
disciplines	Individual client demographics	Uncertain as to data av... ▾
		Uncertain as to data av... ▾
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