

You are What You Eat... and Enter into Data Fields

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Content

1. Who are your presenters?
2. Background: sponsored project system – your data source
3. Common data issues and suggested improvements
 1. Required data vs requested data
 2. Data standardization
 3. Historical vs current data
4. Communication

Your Presenters

1. Intro
2. Background
3. Data purposes
4. Standardization
5. Current vs Historical
6. Communication



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What is your sponsored projects administration system?

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What are the most common data elements you have to clean up before reporting?

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Does your proposal management system differ from your award management system?

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Top 3 Reporting “Issues” Caused by Data Entry

1. Intro
2. Background
3. **Data purposes**
4. **Standardization**
5. **Current vs Historical**
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1. Collecting what is needed vs what is wanted (purpose of collecting data)
 1. Uniform guidance
 2. Collecting “fun” additional data
2. Lack of standardization in data entry
3. Historical vs current day data (department hierarchy and HR affiliations)

Additional Issues to Consider

1. Intro
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1. Data warehousing – creating manual reporting crosswalks
2. Consequences of policies you have no control over but need to account for in reporting
 1. Recognition/shared credit (faculty splitting effort between diff departments)
 2. FA split between departments and central admin
3. Institutional data vs faculty-reported (e.g. manually entered) level data. FAR (Faculty academic review) systems integrating with sponsored reporting
4. Separate awards and proposal management systems

1. Collecting Data for Multiple Purposes

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- Common data needs
 - Federal reporting, internal reporting, state reporting, ROI, benchmark, marketing, hiring, eligibility
- Common data requirements
 - Uniform guidance, internal policy etc.
- Common threads
 - Sponsor, sponsor type, award class, \$ amounts, award ID, project teams
- How often is the information requested? (e.g., annual, quarterly reports, monthly)
- Calendars: academic vs fiscal vs calendar year

1. Solutions (Data for Multiple Purposes)

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- Always collect required data fields
 - Consider commonly requested data fields based on frequency
- Use NSF HERD or other audited reports as a standard for most reports
- Push back on surveys (these organizations appreciate feedback)
 - Clarifications – research (HERD) or total sponsored activity
- Maintain records for \$ amounts
 - Proposed amounts
 - Awarded amounts (anticipated vs obligated)
 - Expenditures (actual amounts)
- Internal audits

2. Standardizing Data Entry

1. Intro
2. Background
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- 4. Standardization**
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- Required
 - Award and project IDs (federal and internal)
 - Sponsor information: Pass through and prime, sponsor type, hierarchy
 - Award purpose
 - Award class e.g., R&D, PS, etc.
 - Award type e.g., grant, contract, etc.
 - Field of science and CIP codes
 - Assistance listing
 - Values: proposed, awarded (anticipated vs obligated), expenditures
- Frequently requested
 - Sponsor award type
 - CAREER, R01, R15, etc.
 - Areas served
 - Inclusion, special projects
 - Abstracts
 - Students supported
 - Yes, even for R&D projects
 - Affiliated departments

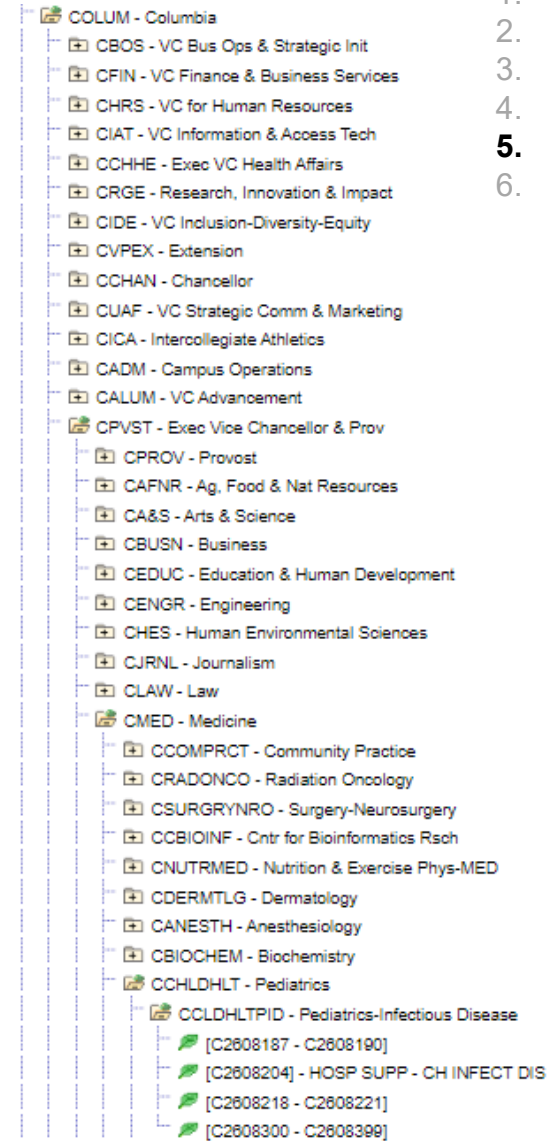
2. Solutions (Standardizing Data Entry)

1. Intro
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- Dropdowns/forced-choice instead of free text
- Award team assignments and EMPLIDs
- Sponsor hierarchy
- FAIN for direct and pass through awards
- Communication with departments – standardize reports across departments
 - Duplicate external award data entry requirements as much as possible
- Work with your IT and analytics departments when available

3. Historical vs Current Day

- How does unit hierarchy impact reporting?
- Human resource vs financial data
- Faculty affiliations vs appointments
- Academic restructuring
- Reporting using current day view vs historical
- Long-term awards/projects
- Updating older records (where to draw the line)



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3a. HR Affiliations

1. Intro
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- How do HR affiliations impact reporting?
- Who is the PI? What department(s) are/were they affiliated with?
 - PIs and co-PI? Shared credit?
 - Collaborative projects
- What department is the award assigned to i.e., who gets the credit and who gets the IDC?
- Centers vs departments
- Funding/budget allocations

3a. Solution (HR affiliations)

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- 5. Current vs Historical**
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- No solution
- Crosswalk of historical to current day hierarchy
- Proactive outreach with faculty
 - New faculty orientation
 - Provost office P&T workshops
- Notice of Appointment (NOA) for current affiliations and assignments
- Assign credit as of “today”
- Use extraneous data fields when warranted (e.g., time/date stamps)

3b. Financial System Assignments

1. Intro
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- Many awards are assigned to various departments due to university policy and budget requirements.
- Financial assignment of awards may differ from HR appointments and affiliations
- Financial records are typically utilized for external reports (e.g., NSF HERD, SEFA, etc.)
 - May not be appropriate depending on the audience
 - Don't give shared credit to co-PIs or project PIs
 - May not show effort from other team members
- High level view

3b. Solutions (Financial System)

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- Utilize external reports (e.g., NSF HERD) as the basis for financials reports.
- Can refer to HR affiliations when appropriate i.e., internal reporting
- Who is the intended audience?
- Required data fields may provide enough information for many inquiries
 - Typically provides a starting point for reporting
 - Usually mirrors what has been “officially” reported
- Warehouse all officially reported data for future reference
 - Maintains consistency across reports
 - Provides a sanity check for other reports

Communication as an Easy Solution

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- Audience and purpose dictates your analysis
- Politically motivated requests
- Crosswalks and data warehouse design
- When in doubt refer to reported expenditures i.e., HERD, SEFA, etc.,
- Share reported data

A photograph of the Missouri State Capitol building, featuring a prominent white dome and a spire. The building is set against a clear blue sky, with yellow autumn leaves visible in the foreground. A large, semi-transparent white text box with a thin orange border is centered over the image. The text "Thank you!" is written in a black, serif font within this box. In the bottom right corner of the image, two email addresses are listed in a black, sans-serif font.

Thank you!

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