OSR Metrics

Office for Sponsored Research
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Kim Griffin
Director, Electronic Research Administration

Northwestern
Metrics now on the Web

• To access metrics pages
  – OSR homepage: Reports & Metrics button
  – https://osr.northwestern.edu/metrics/reports-metrics

• Find answers to questions such as:
  ➢ How much is in OSR’s pipeline for proposals, awards or contracts?
  ➢ How many awards have we received so far? How many for the Chicago campus?
  ➢ What is the median time it takes to get a proposal reviewed? An award or contract set up?
### Understanding OSR METRICS

**FISCAL YEAR-TO-DATE AWARDS**
This graph shows the cumulative year-to-date of award amounts over time, comparing the previous fiscal year to the current. Dollars shown in millions.

![Graph showing FISCAL YEAR-TO-DATE AWARDS](image)

<table>
<thead>
<tr>
<th>FY2018 THROUGH JUNE 30</th>
<th>FY2018 THROUGH JUNE 30</th>
<th>FY2018 THROUGH JUNE 30</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>$409.5</strong> awards in millions</td>
<td><strong>$2.21</strong> proposals in billions</td>
<td><strong>2,447</strong> contracts</td>
</tr>
</tbody>
</table>

**AWARDS IN MILLIONS**
The total amount awarded to Northwestern in the current fiscal year, dollars in millions.

**PROPOSALS IN BILLIONS**
The total amount proposed to sponsors in the current fiscal year, dollars in millions or billions.

**CONTRACTS**
The total number of contracts executed for the current fiscal year. This number refers to a subset of the contracts that run through OSR and is limited to non-funded agreements, outgoing subcontracts, and agreements that run through the OSR contracts team.
Understanding OSR METRICS

Awards

IN WORKFLOW
This graph displays the count of awards that are currently in the setup workflow, broken out by new award and other award. The “new award” category captures new awards being set-up for the first time; the “other award” category captures noncompeting and competing continuations and outyears of funding. Workflow statuses are grouped by those with the department (‘Award Waiting Department’), pending COI (‘Award Pending COI Determination’), or with OSR (‘Award Under OSR Review’, ‘Award under OSR-Ev GO Review’). The data is current as of every Monday morning.

AWARDS

AWARDS PENDING
The total number of awards in the award workflow statuses listed above as of every Monday morning.

AWARDS SETUP
The total number of awards setup by OSR for the current fiscal year.

SETUP TIME
This graph shows the distribution of new award setup time for the current fiscal year grouped in 5-day bins. This includes the time in all statuses – with OSR, with department, and with COI. The chart is updated with the previous month’s data around the 15th of the following month.

AWARDED
This graph shows cumulative year-to-date award amounts by sponsor type, comparing last fiscal year to current. The chart is updated with the previous month’s data around the 15th of the following month.

AWARDS

AS OF JULY 31, 2018
213
AWARDS PENDING

FY2018 THROUGH JUNE 30
2,119
AWARDS SETUP

FY2018 THROUGH JUNE 30
11
MEDIAN WORKDAYS

MEDIAN WORKDAYS
The median number of workdays to setup new awards is displayed, calculated over the current fiscal year. This includes the time in all statuses – with OSR, with department, and with COI.
Understanding OSR METRICS Proposals

**IN WORKFLOW**
This graph displays the count of proposals that are in process. Workflow statuses are grouped by those not yet routed to OSR (‘In Development’, with a pending deadline date, ‘In Pre-Route’, ‘Pre-Route Complete’, ‘Department Requests Revisions’), those in Workflow (‘Under OSR Admin Shell Review’, ‘Admin Shell Incomplete’, ‘OSR Requests Admin Shell Revisions’, ‘OSR Admin Shell Review Complete’, ‘OSR Final Review’, and ‘OSR Requests Final Revisions’) and those in workflow bypass (admin shell received by OSR less than 2 workdays prior to sponsor deadline, including after-the-fact proposals). The data is current as of the previous night’s data warehouse refresh.

**PROPOSALS IN PROCESS**
The total of InfoEd proposals with statuses listed above.

**PROPOSALS SUBMITTED**
The total number of proposals reviewed/submitted by OSR for the current fiscal year.

**REVIEW TIME**
This graph shows the distribution of proposal administrative shell review time by OSR for the current fiscal year grouped in 5-day bins. The chart is updated with the previous month’s data around the 15th of the following month.

**SUBMITTED**
This graph shows cumulative year-to-date proposed amounts by sponsor type, comparing last fiscal year to current. The chart is updated with the previous month’s data around the 15th of the following month.
Understanding OSR METRICS
Contracts

IN WORKFLOW
This graph displays the count of contracts/agreements that are in any agreement statuses other than Approved or Terminated. This represents a subset of the contracts that run through OSR and is limited to non-funded agreements, outgoing subcontracts, and agreements that run through the contracts teams. Workflow statuses are grouped by those with OSR (‘Fully Negotiated’, ‘Pending OSR Signature’, ‘Started’, ‘Under Negotiation - NU’); those with the sponsor (‘Pending Other External’, ‘Pending Receipt of Draft Agreement’, ‘Pending Return of Subcontracts’, ‘Pending Sponsors Full Execution’); and those with another Northwestern office outside OSR (all other statuses).

EXECUTED
This graph shows cumulative year-to-date contracts/agreements executed by agreement type (Clinical Trial, Material Transfer, Outgoing Subcontract, and all other) comparing last fiscal year to current. The chart is updated with the previous month’s data around the 15th of the following month.

TIME TO EXECUTION
This graph shows the distribution of total days from start to finish for executed contracts for the current fiscal year grouped in 10-day bins. This includes the time in all statuses – with OSR, with department, and with COI. The chart is updated with the previous month’s data around the 15th of the following month.

CONTRACTS PENDING
The total of InfoEd contracts/agreements with statuses other than Approved or Terminated. The contracts included in this count currently represent a subset of the contracts that run through OSR, and are limited to non-funded agreements, outgoing subcontracts, and agreements that run through the contracts teams.

CONTRACTS EXECUTED
The total number of contracts/agreements executed by OSR for the current fiscal year up to date. The contracts included here represent a subset of the contracts that run through OSR and are limited to non-funded agreements, outgoing subcontracts, and agreements that run through the contracts teams.

MEDIAN DAYS
The median number of days for total contract execution time is displayed, calculated over the current fiscal year.
Navigation Tips: Landing Page

- Click purple stats on metrics landing page for more detail.
- Download detailed monthly reports from metrics landing page.
- Link to ‘Understanding’ guide at bottom center (all pages).
- Campus nav on metrics landing page.
Navigation Tips: Submetrics Page

AWARDS: CHICAGO

IN WORKFLOW

AWARDED:

AWARDS / PROPOSALS / CONTRACTS NAV MENU ON SUBMETRICS PAGE

AWARDED: This graph shows cumulative year-to-date award amounts for the Chicago campus by sponsor type for the previous fiscal year and the current fiscal year to date. [Note: Click on the image to view a larger version of the graph.]

AS OF SEPT. 12, 2016
32 AWARDS PENDING

FY2016 THROUGH JULY 31
1,547 AWARDS SETUP

FY2016 THROUGH JULY 31
8.8 MEDIAN WORKDAYS

HOVER OVER GRAPHS FOR EXPLANATORY TEXT (ALSO WORKS ON LANDING PAGE GRAPHS) OR CLICK ON SMALL GRAPHS TO ZOOM LARGER

Northwestern
Coming Next…
…on the reporting/metrics front
Coming Next

• Exploring options available via Northwestern’s new Tableau server
  – Interactive reports that can be filtered
    • By dept, sponsor, PI
  – Access to basic ESPR data for simple reports

• FY18 planned project
  – Re-design of pre-award reporting in Cognos
Questions?