Motivation

• Identify commonalities and best practices for completing OEPM tasks
• Gather **constructive** ideas for improving the OEPM system and the data collection process
• Get insight into the OEPM review process at HQ
Overview

• Insights into HQ OEPM review
• Survey results
• Discussion
What is included in the term OEPM?

- The OEPM system
- Student Data Tables
- Expenditures Summary
INSIGHTS INTO OEPM REVIEW
Why do we report our performance data?

- Government Performance Results Act (GPRA)
  - Required federal agencies to develop strategic plans, budgets (with performance plans), and annual reports and provide them to Congress

- GPRA Modernization Act of 2010
  - Expanded GPRA = even more reporting!
Why is our OEPM data due in May/June?

• 1st stop: HQ/Mike Cherry (End May/Early June)
  – Verification of data in OEPM against student data tables, expenditure summary tables, and APD (if available)
  – Identify inconsistencies for corrections/explanations

• 2nd stop: Office of Education Infrastructure Division (July)
  – Aggregation of Office of Education data into larger dataset to compare against the current year’s performance measures

• 3rd stop: Office of the Chief Financial Officer (August)
  – Further aggregation of Agency-level data to present to the Office of Management and Budget (OMB) for NASA draft budget submission in September

• 4th stop: OMB (September to December)
  – Examines performance against measures to provide input back to NASA on goals and budget requests
What does HQ look for in the OEPM review?

• Completion
  – Pre/Post management marked “Ready for Review.”
  – All Projects in Activity Data marked as “Complete.”

• Consistency
  – Post management: Are there any changes from pre-management? Why?
  – Post management vs. expenditures summary. Red flags if they don’t match up.

• Ratio of money in Management and Admin
  • Approaching 30% can get budget flagged for further analysis

  – Are all base funds (e.g., $575K or $430K) accounted for in the year being reported?
    • Report all funding as if you spent it. (i.e., encumbered)
    • Report all data (numbers of students, participants, etc.) even if the project has not finished yet.

  – How the information compares to the APD (if available)
What does HQ look for in the OEPM review? (cont.)

• Are the student data tables consistent with data in OEPM?
  • The Student Data Table should be the control document.
    – Check the number of Fellowship/Scholarship awards in OEPM against Table A2
    – Count all students in Higher Ed and Research Infrastructure projects in OEPM and make sure they total to Table B.
    – If those don’t match up you will get a call.
  • At a minimum, all Fellowship/Scholarship students who receive funding, and all Higher Education/Research Infrastructure significant awards need to have an award record in OEPM.
    – Entering awards for non-significant Higher Education/Research Infrastructure awards is appreciated, but not required.
  • The biggest cause for a call this year - fellowship and scholarship students.
    – Enter all fellowship and scholarship students into OEPM regardless of award amount
    – Fellowship and scholarship numbers in student data tables should always match OEPM. (Exception: multiple awards.)

• Email Mike if any students receive multiple awards.
Helpful Resources and Tips

• Resources
  • OEPM FAQs and Tutorials
  • The HQ team has access to additional OEPM reporting tools:
    – MS Excel export of all student awards – Give Mike a call.
    – Call Mike instead of using data output files. They might not be accurate.
  – Other Space Grant Coordinators
    • Great sources of expertise, forms, processes

• Other Tips
  • Keep your Launchpad password/account up-to-date
  • Keep your IT Security and HQ Security Awareness Training up-to-date and send copies of your certificates to Mike Cherry.
    – Failure to keep these up-to-date will result in a suspension of your NASA account.
SURVEY RESULTS
Limitations and Caveats

• Limitations
  – Only surveyed Western Region; thus the results are a subset of the total population

• Caveat
  – Suggestions do not always equal action
What month did you start entering your data into OEPM this past year?
When did you initially submit your completed OEPM data to NASA?

- Before April 30th: 0.0%
- Between May 1st and May 29th: 10.0%
- Between May 30th and June 2nd: 70.0%
- Between June 3rd and June 9th: 20.0%
- After June 10th: 0.0%
Was your APD due before or after OEPM was due?

- My APD was due before my OEPM: 75%
- My APD was due on the same day: 17%
- My APD was due after the OEPM deadline: 8%
How many people in your consortium worked on the OEPM submission?

- 2 people: 33%
- 3 people: 25%
- More than 4 people: 8%
- 4 people: 0%
Approximately how much time (in hours) did it take you to compile and enter your data into OEPM this year?

- **Additional Comments**
  - 140: 110 Hours from Asst. Director (includes prep of data forms for affiliates, determining data needs, and pre-entry preparation)
    - 30 hours from Prog. Coord.
  - At least 70-80 hours (~3 days)
  - Hard to really assess. We work on it over the year, both of us working on it.
Approximately how many days/weeks did it take you to complete OEPM entry?
Please rate the following sections of OEPM in terms of ease of completion:

- **Affiliate Network**: Very easy (14), Relatively easy (12), Neither easy or difficult (10), Somewhat difficult (8), Very difficult (6)
- **Pre-Management**: Very easy (14), Relatively easy (12), Neither easy or difficult (10), Somewhat difficult (8), Very difficult (6)
- **Post-Management**: Very easy (14), Relatively easy (12), Neither easy or difficult (10), Somewhat difficult (8), Very difficult (6)
- **Activity Data**: Very easy (14), Relatively easy (12), Neither easy or difficult (10), Somewhat difficult (8), Very difficult (6)
Please rate the following sections of OEPM in terms of ease of completion

- Affiliate Network
- Pre-Management
- Post-Management
- Activity
- Student Awards/Profiles
- Expenditures
- Student Data Tables (MS Excel file)

Very little time
Somewhat time intensive
Very time intensive
Do you capture your data in another format before transferring it to OEPM? If so, what?

- Spreadsheet/workbook: 91.7%
- Electronic document: 75.0%
- Database: 25.0%
- Hard copy files: 25.0%
- In my head: 8.3%

Other answers: Survey Monkey

Not sure: 8%

Yes: 92%
Quite often, the student data submitted via OEPM is incomplete (i.e., missing information related to majors, mentors, degree level, etc.). Usually, this data is collected in OEPM through the Student Profile form and the Student Award form (associated with the activity). If you have previously submitted student data without all of the fields completed, can you identify the reason(s) why?
We don't collect that information (44.4%)  
We can't share that information (11.1%)  
Time is short and I have a lot of students to enter, so I only complete the fields marked as "required" (88.9%)  
I assumed NASA already had this data via longitudinal tracking (0.0%)  
I have entered this data for the same student in a previous year, I assume we don't need to do so again (0.0%)
What month would you prefer that OEPM open for data entry?

- January: 33.3%
- February: 0.0%
- March: 8.3%
- April: 0.0%
- May: 0.0%
- June: 0.0%
- July: 8.3%
- August: 0.0%
- September: 33.3%
- October: 16.7%
- November: 0.0%
- December: 0.0%
What do you find most difficult about OEPM data submission?

<table>
<thead>
<tr>
<th>Answer Options</th>
<th>Response Percent</th>
<th>Response Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Matching up data in the system with the MS Excel Expenditure Summary and Student Data Tables</td>
<td>25.0%</td>
<td>3</td>
</tr>
<tr>
<td>Trying to access the system</td>
<td>25.0%</td>
<td>3</td>
</tr>
<tr>
<td>Losing my data if I forget to save</td>
<td>16.7%</td>
<td>2</td>
</tr>
<tr>
<td><strong>Getting the dedicated time to complete it</strong></td>
<td><strong>58.3%</strong></td>
<td><strong>7</strong></td>
</tr>
<tr>
<td>Not understanding why NASA needs so much data</td>
<td>16.7%</td>
<td>2</td>
</tr>
<tr>
<td><strong>It seems to duplicate the APD</strong></td>
<td><strong>41.7%</strong></td>
<td><strong>5</strong></td>
</tr>
<tr>
<td>All the writing!</td>
<td>16.7%</td>
<td>2</td>
</tr>
<tr>
<td>Collecting all of the student data</td>
<td>8.3%</td>
<td>1</td>
</tr>
<tr>
<td><strong>Entering in all the student data</strong></td>
<td><strong>66.7%</strong></td>
<td><strong>8</strong></td>
</tr>
</tbody>
</table>
What aspects of OEPM do you like?

<table>
<thead>
<tr>
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</tr>
</thead>
<tbody>
<tr>
<td>Clarity of the questions/data requests</td>
<td>8.3%</td>
<td>1</td>
</tr>
<tr>
<td>It is an improvement over the previous system</td>
<td>25.0%</td>
<td>3</td>
</tr>
<tr>
<td>Ease of data entry fields</td>
<td>16.7%</td>
<td>2</td>
</tr>
<tr>
<td>Ease of page navigation</td>
<td>16.7%</td>
<td>2</td>
</tr>
<tr>
<td>Ease of system access</td>
<td>0.0%</td>
<td>0</td>
</tr>
<tr>
<td>Access to previous years' data</td>
<td>66.7%</td>
<td>8</td>
</tr>
<tr>
<td>The FAQs and Help pages</td>
<td>8.3%</td>
<td>1</td>
</tr>
<tr>
<td>Customer service from HQ/Mike Cherry</td>
<td>83.3%</td>
<td>10</td>
</tr>
<tr>
<td>Other (please specify)</td>
<td></td>
<td>5</td>
</tr>
</tbody>
</table>
Please share any tips, tricks, shortcuts, or advice you have for compiling and completing your OEPM data submission.

<table>
<thead>
<tr>
<th>Advice</th>
</tr>
</thead>
<tbody>
<tr>
<td>Get a SurveyMonkey paid account and use it to prepare forms for each of the program elements and have your affiliates fill out their info in those forms. Then you download them into excel, verify them and use them to prepare your OEPM submission.</td>
</tr>
<tr>
<td>Use two windows for OEPM (can be different browsers and, if you can afford it, different monitors). Have one window open to the previous year and the other open to the current year. Use this to be able to transfer descriptions for projects you are continuing into the current year.</td>
</tr>
<tr>
<td>Make sure the information in your Progress APD report aligns with the pre- and post-management sections of OEPM</td>
</tr>
<tr>
<td>Work with another person and not by yourself when entering data. Also sharing information among the other state's has been really helpful.</td>
</tr>
<tr>
<td>Put everything in a word document first</td>
</tr>
<tr>
<td>Verify your Launchpad password at least a month beforehand</td>
</tr>
</tbody>
</table>
Please share any tips, tricks, shortcuts, or advice you have for compiling and completing your OEPM data submission.

"Minnesota SGC shared a blank template and sent it out to all our affiliates to utilize. We asked that entries were returned to us at least 2 weeks prior to our deadline submission to allow enough time to compile and enter onto OEPM.

Also, I created a detailed spreadsheet of student data that is updated annually with up-to-date information provided by past and current recipients. After this intensive compilation of data, I was able to complete the student tables easily.

We keep our own student data tables in excel with pivot tables already set-up. New students go in every year, table is set up to give the necessary data out.

Created set of forms for each element of program activity data and student awards that mimics the OEPM form. Ask our affiliates to complete on each activity funded. Since the forms are almost identical to OEPM, it makes data entry easier as you go through each field.

Start as soon as OEPM opens up. Upload information as you get it. Don't wait until the last minute.
What suggestions do you have for improving OEPM data collection?

Would be good to have access to it for at least 6 months before the due date.

Functionality should be added that enables us to check our own work. For example, we should be able to preview each page of the activity data forms as they are populated. We also should have the ability to create ad hoc reports, as we did with CMIS.

Need ability to change student profile and delete duplicate entries that are wrong and/or are a student we have but some other entity entered before us. It would also help if some information was pre-populated, such as if we search for a student profile that does not exist when we go to enter the information that student's name appears and we do not need to retype it.

If there were a standard electronic form we could give to each of our students to fill out, and to faculty advisors or event organizers of student teams or projects funded by space grant, that we could easily import into OEPM to decrease the amount of time spent in reporting, that would be helpful. That way, the Space Grant coordinators themselves would not have to enter all of this data, and could instead review it, and paste it into the OEPM system.

We should be able to enter data all year round so we are not rushed in a few weeks to get it all entered.

Shorten it.

Allow access to previously entered data, especially projects in Activity Data sections. Most of what we do are the same programs (redundant to enter the same job descriptions, etc.). In addition to adding new projects, all really we need to do for existing projects that continue every year is to update the numbers and add changes for that reporting period. Why do we need to enter the same information again? It's a waste of time.

Provide a section where we can access a detailed summary of what we entered. Similar to what CMIS provided. This allowed us to view a full report of what we did for the reporting period. Unless the system is does not have the capability. Perhaps our system managers can provide to us a report of our submission.

Please do not fire Mike Cherry!!! He's such an asset to this process!
What suggestions do you have for improving OEPM data collection?

<table>
<thead>
<tr>
<th>Suggestion</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Having previous years information populate in the current year</td>
<td>Having previous years information populate in the current year would be hugely beneficial.</td>
</tr>
<tr>
<td>OEPM doesn't count belly buttons!</td>
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</tr>
<tr>
<td>Would be nice to have a template form that shows all the options for all</td>
<td>Would be nice to have a template form that shows all the options for all the forms. Some forms have hidden fields that don't pop up until a particular question is answered in a particular way. So you don't know to collect the information until it is too late.</td>
</tr>
<tr>
<td>the forms. Comparisons from year to year do not make sense such as going</td>
<td>Keep the questions the same from year to year so we can always collect the same data. Comparisons from year to year do not make sense such as going from number of publications to number of authors.</td>
</tr>
<tr>
<td>from number of publications to number of authors.</td>
<td></td>
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<td>Have the system basically available year-round so we can enter items as</td>
<td>Have the system basically available year-round so we can enter items as they come up. This would help so that it doesn't feel like as big of a bombshell being dropped on you near the deadline.</td>
</tr>
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<td></td>
</tr>
</tbody>
</table>
What is your favorite way to celebrate after completing OEPM?

- High fives to everyone in the office: 38%
- Alcohol: 25%
- Therapy: 13%
- Karaoke: 12%
- Sleeping: 12%
- Chocolate: 0%
- Why celebrate? Getting to work on my OEPM submission is celebration enough!: 0%

Why celebrate?

- This past year I had to take long walks, journal, and write poetry to feel "human" again after pulling such long hours. My right wrist ached for months (was working on a proposal at the same time as OEPM!).
- and Karaoke with the other states!
- I don't
- Getting up and walking to get blood back in my legs!
- All of the above and a massage!!! :)"}
Thank You!