State of the Alliance: HRA’s Strategic Plan Progress Report
www.healthra.org/hra-strategic-plan/

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2021 Strategic plan process

OBJECTIVE: TO ENHANCE HRA’S VALUE TO HRA MEMBER ORGANIZATIONS

PHASE I
Establish Strategic Planning Committee (SPC) and select external firm
Spring 2020

PHASE 2
Develop instruments and collect feedback
Spring - Summer 2020

PHASE 3
Draft Plan
Fall 2020 - Spring 2021

PHASE 4
Collect, analyze feedback, revise, approve/post final version
Spring - Fall 2021

PHASE 5
Implement recommended strategies (Including SPEC)
ongoing

PHASE 6
Define metrics, evaluate progress, revise strategies, refocus priorities
ongoing
2021 Strategic plan goals

OBJECTIVE: TO ENHANCE HRA’S VALUE TO HRA MEMBER ORGANIZATIONS

Goal 1. Improve the Scientific Research Process

Goal 2. Drive Institutional Learning to Increase Member Organizations’ Effectiveness

Goal 3. Foster HRA Community

Goal 4. Empower HRA Through a Solid HRA Base
Goal 1: Strategies

IMPROVE THE SCIENTIFIC RESEARCH PROCESS

➢ Enhance the effectiveness of HRA member organizations’ own efforts to increase diversity, equity, and inclusion (DEI) within their portfolios, the scientific workforce, and the health care system.

➢ Enhance the ability of HRA member organizations to develop and implement open science policies and practices (including team and collaborative science) that advance scientific discovery.

➢ Increase the capacity of HRA member organizations to effectively communicate science and impact to targeted audiences.
DEI Community
Cochairs: Sindy Escobar-Alvarez, Zoë Fuchs, Lindsay Redman Rivera, and Kelly Rose

Peer Review

What strategies, if any, has your organization used to increase diversity in the awardee pool?

- Diversification of review panel members: 55.88% (19)
- Anti-bias training for staff: 29.41% (10)
- Anti-bias training for reviewers: 23.53% (8)
- Earmark funds to support demographic targets: 17.65% (6)
- Use of rubrics or proposal scoring methods to reduce bias: 14.71% (5)
- Collection & evaluation of diversity statements: 8.82% (3)
- Other (please describe): 2.94% (1)

Strategies to Increase Diversity

1) Has your organization tried any strategies to increase diversity in award applicant pools? If so, briefly list.

Main strategies:
- Direct outreach to institutions/organizations
- Direct outreach to individuals
- RFP/Application materials
- Review Process

Demographic Data Collection

About which groups of stakeholders are you collecting demographic data? (check all that apply)

- Applicants: 96.30% (26)
- Leadership: 29.63% (8)
- Staff: 29.63% (8)
- Reviewers: 22.22% (6)
- Patient Advocates: 11.11% (3)
- Other (please specify): 7.41% (2)

Strategies for inclusive grantmaking

Grantmaking organizations play a crucial role in increasing diversity and equity in the biomedical workforce. Collecting demographic data, increasing the diversity of applicants and reducing bias in peer review are valuable strategies to achieve these goals.

Maryrose Franko, Sindy Escobar-Alvarez, Zoë Fuchs, Kimberly Lezak, Lindsay Redman Rivera, Miquella C. Rose and Kristen L. Mueller
Diversity, Equity, Inclusion
Goal 1: Improve scientific research process

DEI Community Collaborations and Webinars

Disability & Philanthropy Forum

Inclusive Grantmaking Initiative (IGI)
Support from DDF, Rita Allen, JSMF

- New IGI Project Lead (Jenna Hicks)
- Equitable & informative data collection
- Bias Reduction Training Models
  Jessica Biddinger, Kim Lezak, Kevin Sia

Nonbinary Scientists Want Funding Agencies to Change How they Collect Gender Data
Too many surveys fail to include options beyond “male,” “female” and “do not wish to disclose”

And MANY more webinars!
Open Science
Goal 1: Improve scientific research process

Open Science & Data Sharing Community
Chair: Salvo La Rosa

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High-Value Data Stimulates Research
Tony Kerlavage, PhD
Director, Center for Biomedical Informatics and Information Technology

Key NIH & NCI Data Sharing Policies

- Funded investigators may benefit from first & continuing use of their data, but not prolonged exclusive use.
Open Science
Goal 1: Improve scientific research process

Explore the Value of Open (EVO) Program
EVO Consultant: Kristen Ratan

- Webinars
- Resources
- Birds of a Feather (cohorts)

The White House announces
The 2023 Year of Open Science

NASA + NSF + NOAA + DOA + DOC + DOE + GSA + NEH + NIH + NIST + USDA + USGS

HRA is a participating member!
Communicate science and impact
Goal 1: Improve scientific research process

Communications Community Cochairs: Cody Barnett, Russ Campbell, Kelsey Hampton, Muno Sekon
Program Evaluation Community Cochairs: Heather Calderone, Brent Dolezalek, Orna Ehrlich

Communications: Listserv & Webinars
• From Thankless to Springboard: Rethinking Annual Reports
• Social Media: Never One Size Fits All
• Strategic and Proactive Communications
• Storytelling as a sensemaking strategy
Communicate science and impact
Goal 1: Improve scientific research process

Program Evaluation Community: Provides tools to evaluate impact of research funding

Resources: Google docs capture members’ experiences with platforms

Webinars:
• Going beyond bibliometrics: Komen’s Product Tracker
• Utilizing Visualization for Program Evaluation
• Logic Models: develop programs/measure impact

Thinking of Logic Models as a Series of If . . . Then Statements

- Resources/Inputs
- Activities
- Output
- Outcome

Utilizing Visualization for Program Evaluation: Techniques and Strategies

Map of Scientific Collaborations from 2005-2009

Members Meeting: Developing strategic approaches to communicating the value of your research
Goal 2: Strategies

DRIVE INSTITUTIONAL LEARNING TO INCREASE MEMBER EFFECTIVENESS

- Enhance listserv capacity to (1) serve the needs of members with diverse roles for information regarding specific issues, and (2) identify and prioritize new learning opportunities (e.g., webinars, learning communities, and member meeting sessions).

- HRA member convenings (including webinars) are developed and organized so that participants with diverse organizational roles are engaged - fostering education, information sharing and catalyzing group activities.

- Develop structures/policies/procedures to strengthen use of learning communities and other initiatives and/or programs to meet member needs.

- Enhance the functionality and value of HRA's website to HRA member organizations.
Listserv
Goal 2: Increase member effectiveness

Activities:
1. Create new listservs for Jobs and RFAs/RFPs
2. Create other listservs as needed (CEO, Communications, Fundraising)
3. Request that “main” listserv posters compile responses
4. Staff compile responses (if necessary) and disseminate
5. Explore alternative platforms with enhanced functionality (create task force?)
   ➢ searching
   ➢ archiving
   ➢ discussing

Listserv Responses: Return of Clinical Research Results [February 2023]

LISTSERV SUMMARY
Thank you to Erik Lontok, PhD, Director of Research, at the Barth Syndrome Foundation for compiling the responses to his listserv post on 2/13/2023. ADDITIONAL SHARED RESOURCES ARE WELCOME! Original Post for which Erik compiled responses in the “Return of Clinical Research Results” document: BSF is revising our clinical study...
MM and All Convenings
Goal 2: Increase member effectiveness

Activities:
1. Create and charge Members Meeting Task Force
   Joe Cotter, Kristen Mueller (cochairs) & Megan Allen, Heather Calderone, Brent Dolezalek, Amy Laster, Judy Quong

2. Implement more effective virtual meeting platforms
   a. Enhance networking, discussions, etc.

3. Explore alternative in-person meeting formats/goals
   a. Regional
   b. Topic-based (MM or separate)
   c. National (public)

4. Designate Program Committee(s)
   appropriate to meeting format/goals
Learning communities & other programs

Goal 2: Increase member effectiveness

Activities:

1. Create communities and programs to address needs
   a. 10 Learning Communities (EVO & IGI)
      [www.healthra.org/communities/](http://www.healthra.org/communities/)
   b. Professional Development Program
      [www.healthra.org/members/members-professional-development-program/](http://www.healthra.org/members/members-professional-development-program/)

2. Set expectations
   a. Define mission/goals, meeting frequency
   b. Identify deliverables

3. Increase value, accountability, & visibility
   a. Create and post deliverables
   b. Annual presentation to the board
   c. Develop sessions for Members Meetings

4. Respond to members’ needs
   a. Annual survey of topics/needs
   b. Follow-up on conversations (members meetings, listserv discussions, etc)
Website

Goal 2: Increase member effectiveness

Activities:

1. Use web analytics to evaluate usage
2. Drive members (and nonmembers) to resources via newsletters, listserv posts, etc.
3. Create, post, publicize resources that add value
   a. Grants Admin Handbook
   a. Compiled listserv posts
   b. Webinar slides/recordings
   c. Community resources
   d. External resources
4. Solicit input from members on usability and value
   a. Surveys and/or focus groups
Goal 3: Strategies

FOSTER HRA COMMUNITY

- Enhanced learning, collaboration, and networking at a variety of HRA convenings including semiannual, regional, or targeted member meetings.

- Enable members to connect and engage based on shared characteristics or interests, driving new relationships and collaborations.

- Deepen HRA member engagement to increase the capacity of individuals in member organizations to be more effective in their careers.
Activities:

1. Create and charge Members Meeting Task Force to enhance value

2. Explore alternative in-person meeting formats/goals
   a. Regional
   b. Topic-based (either MM or separate)
   c. National (public)

3. Implement more effective virtual meeting platforms
   a. Enhance networking, discussions, etc.

4. Designate Program Committee(s) appropriate to meeting format/goals
Build relationships & collaborations
Goal 3: Foster community

Activities:

1. Create and facilitate interest-based groups
   a. CEO Roundtables (and listserv)
   b. Book Club
   c. Professional Development – Mentoring Circles (Intern hired)
   d. Communications listserv
   e. Fundraising professionals listserv
   f. Others?

2. Create member directories
   a. Organizational
   b. Individual
Deepen HRA member engagement
Goal 3: Foster community

Activities:

1. Host “Getting the Most out of your HRA Membership” calls
   a. New members
   b. Staff at current members

2. Produce onboarding material and welcome packet for new members

3. Implement “buddy system” at meetings
   match 1st time meeting attendees with experienced attendee

4. Annual engagement and interest survey
EMPOWER HRA THROUGH A SOLID HRA BASE

➢ Expand the **breadth and depth of perspectives** represented by HRA member organizations.

➢ Provide **shared services** to HRA members that members use and find valuable.

➢ Strengthen HRA’s ability to develop additional programs of value by **expanding and diversifying both staff and financial resources** (including and beyond membership dues).

➢ Provide resources to **analyze grant funding data** for a wide variety of purposes (landscape and gap analyses, co-funding, identifying collaborators, visualizing trends, etc.)

➢ **Amplify the voices of HRA members** individually and collectively to multiply their impact on areas of importance to the biomedical research community.
Expand breadth and depth of perspectives
Goal 4: Empower HRA through a solid base

Activities:

1. Strategic recruitment of new member organization
2. Expand and diversify learning and engagement opportunities
   a. Communities and interest-based groups
   b. Meeting / webinar topics
   c. Listservs and listserv topics
   d. HRA leadership
Provide valuable shared services
Goal 4: Empower HRA through a solid base

Activities:
1. Website
2. Listserv
3. Convenings
4. HRA Open
5. ORCID Consortium
6. HRA Analyzer (Awardee Database)
Expand/diversify staff and financial resources
Goal 4: Empower HRA through a solid base

Activities:

1. Member support beyond dues
   a. Grants (3 current DDF, JSMF, Rita Allen)
   b. Former or In-kind (Donaghue, HRiA, ASF, JDRF, PEW)
   c. Ad hoc (BWF, ALZ)
   d. All the Members Meeting hosts

2. New IGI Project Lead (2-year)

3. Internship program (over 10!)
   a. Professional Development intern (current)
   b. Grants Admin intern (current)
   c. Many former interns

4. Contractors
   a. HRA Analyzer contractor
   b. EVO Program contractor
   c. Operational contractors (website, financial services firm, etc)
Provide resources to analyze grant funding
Goal 4: Empower HRA through a solid base

Activities:

1. HRA Analyzer (awardee database)
   a. Grantmaking Report
   b. Lunch and Learns
   c. Contractor to help import data (Diane Saunders)
Amplify voices
Goal 4: Empower HRA through a solid base

Activities:
1. Identify priority areas for members
2. Participate in national conversations
3. Collaborate with other sectors
   a. Nonprofit
   b. Government
   c. Academia
4. Serve as a convener
5. Allocate resources to address needs
   a. HRA Open (NLM partnership)
6. Highlight HRA members’ influence
   a. Grantmaking report
Discussion Questions

● Strategies appropriate?
● Missing any?
● Prioritization appropriate?
● Way to measure value added?
  • web analytics
  • survey of the membership
  • what else?
● Sufficient accountability and transparency?
● Desired process for review and revision?

Send comments to  Maryrose@HealthRA.org