

State of the Alliance: HRA's Strategic Plan Progress Report

 www.healthra.org/hra-strategic-plan/

Maryrose Franko, Executive Director

February 22, 2023

Annette Huetter, Director of Operations

Jenna Hicks, Inclusive Grantmaking Initiative, Project Lead

2021 Strategic plan process



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

PHASE I

Spring 2020

Establish Strategic Planning Committee (SPC) and select external firm

PHASE 2

Spring - Summer 2020

Develop instruments and collect feedback

PHASE 3

Fall 2020 - Spring 2021

Draft Plan

PHASE 4

Spring - Fall 2021

Collect, analyze feedback, revise, approve/post final version

PHASE 5

ongoing

Implement recommended strategies (Including SPEC)

PHASE 6

ongoing

Define metrics, evaluate progress, revise strategies, refocus priorities

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.

Diversity, Equity, Inclusion

Goal 1: Improve scientific research process

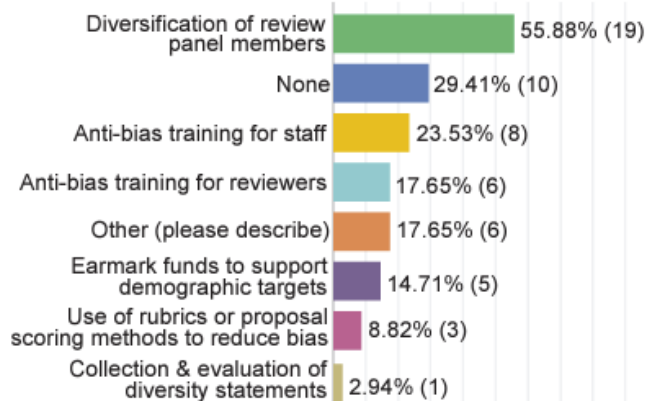


DEI Community

Cochairs: Sindy Escobar-Alvarez, Zoë Fuchs, Lindsay Redman Rivera, and Kelly Rose

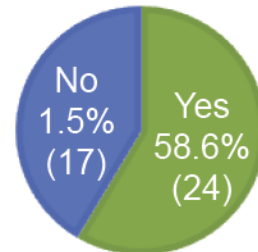
Peer Review

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



Strategies to Increase Diversity

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

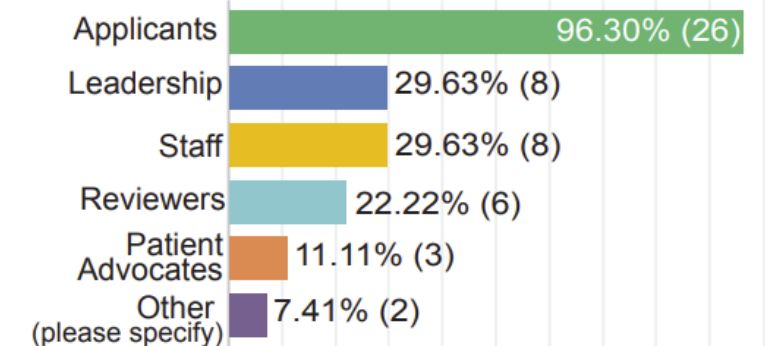


Main strategies:

- 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)

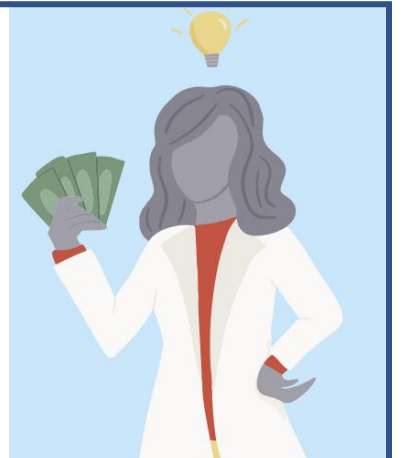


naturemedicine

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

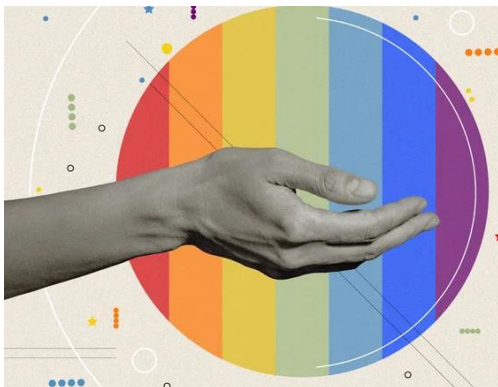


DEI Community Collaborations and Webinars



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!



National Institute of General Medical Sciences



Building Mentoring and Community Platforms to Support DEI in your Scientific Network: Overview of NIH/NIGMS Programs to Enhance Diversity of the Biomedical Research Workforce

Shakira Nelson, PhD
Program Officer
Division of Training, Workforce Development and Diversity
April 20, 2022

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

Open Science

Goal 1: Improve scientific research process



Open Science & Data Sharing Community Chair: Salvo La Rosa

OPEN SCIENCE RESOURCES – DECEMBER 2022

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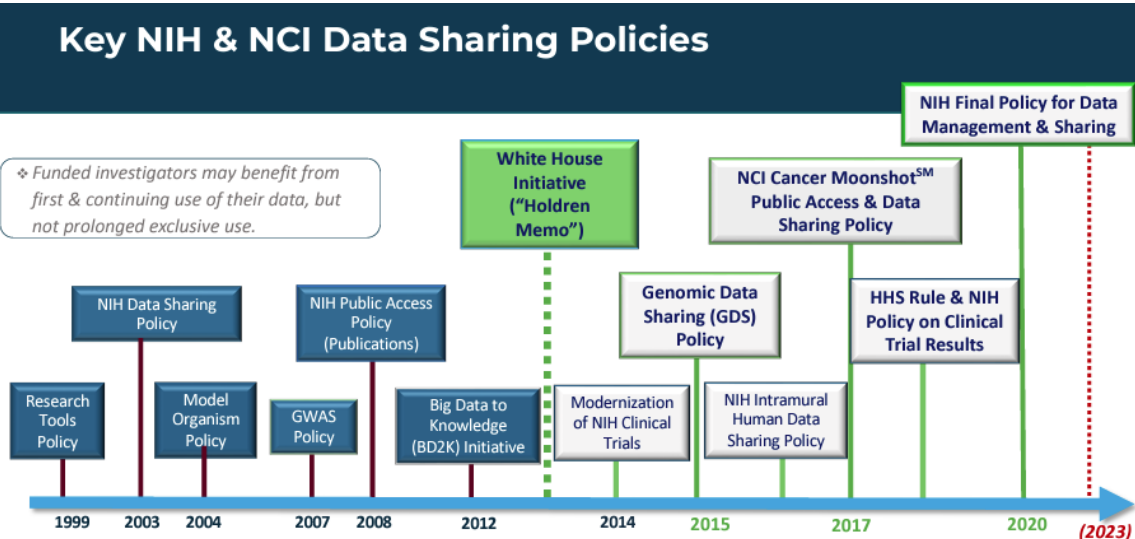
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High-Value Data Stimulates Research

Tony Kerlavage, PhD
Director, Center for Biomedical Informatics and Information Technology

Developing a Toolkit for Fostering OPEN SCIENCE PRACTICES

NATIONAL ACADEMIES *Sciences Engineering Medicine*



Open Science

Goal 1: Improve scientific research process



HRA Open

National Library of Medicine <small>National Center for Biotechnology Information</small>	U.S. FOOD & DRUG ADMINISTRATION
<p>Available in PMC</p>	

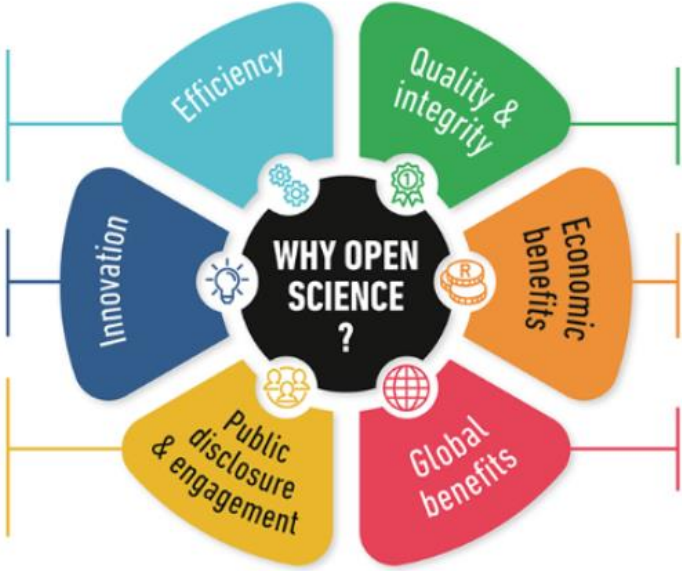
Log in with Orcid account

Grants ↔ **Outputs**

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

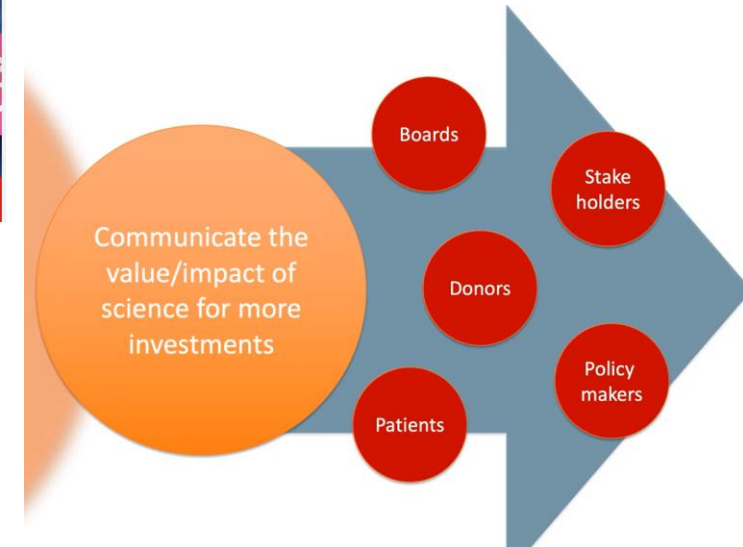
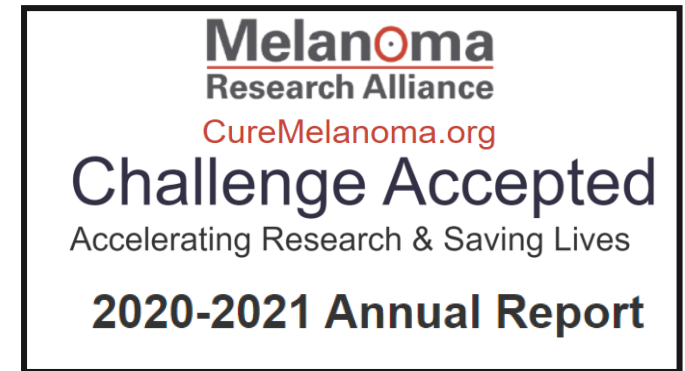
Cochairs: Cody Barnett, Russ Campbell Kelsey Hampton, Muno Sekon

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



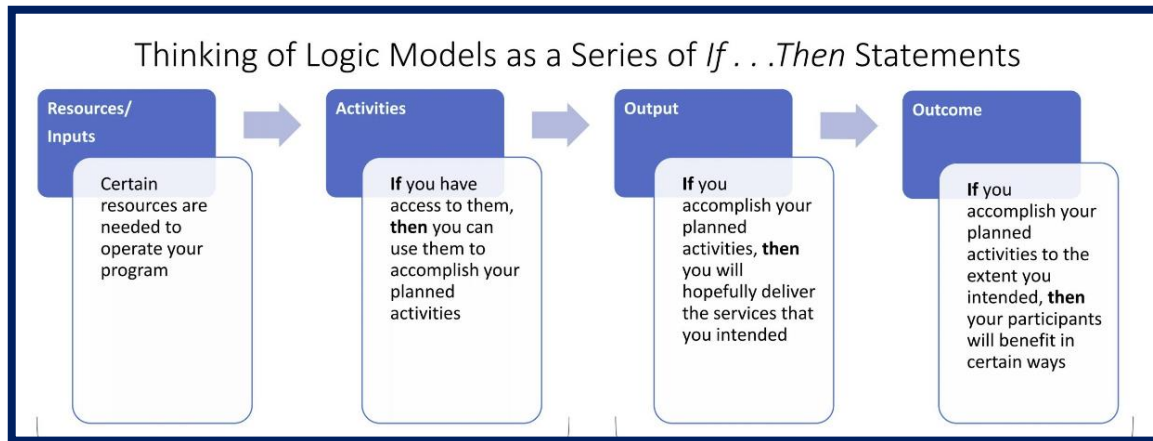
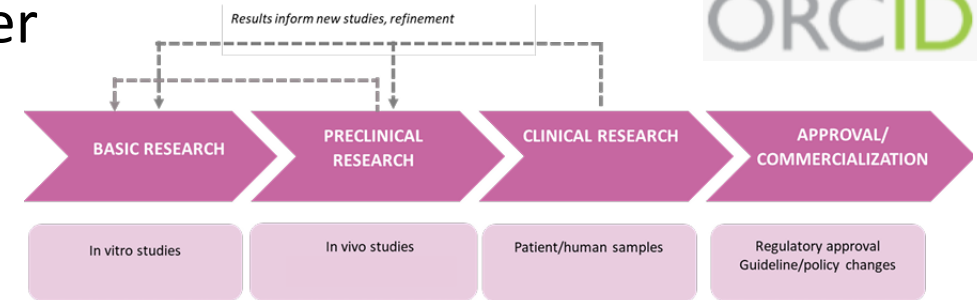
Program Evaluation Community: Provides tools to evaluate impact of research funding

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



Utilizing Visualization for Program Evaluation: Techniques and Strategies



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

- jobs@lists.healthra.org
- rfa.rfp@lists.healthra.org

- ceo@
- comm@
- fundraisingprofessionals@

The logo for handzin, consisting of a stylized white 'h' icon followed by the word "handzin" in a bold, white, sans-serif font, all on a dark blue background.

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 RESORUCES 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/
 - b. Professional Development Program
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)



Learning Communities

- Communications
- Diversity Equity Inclusion >
- Drug and other Therapy Development
- Funder-Institution RelationS Task (FIRST) Group
- Grants Administration
- Misconduct and Ethics
- Open Science >
- Program Evaluation
- Registry and Biorepository Community
- Research Workforce & Early Career Development

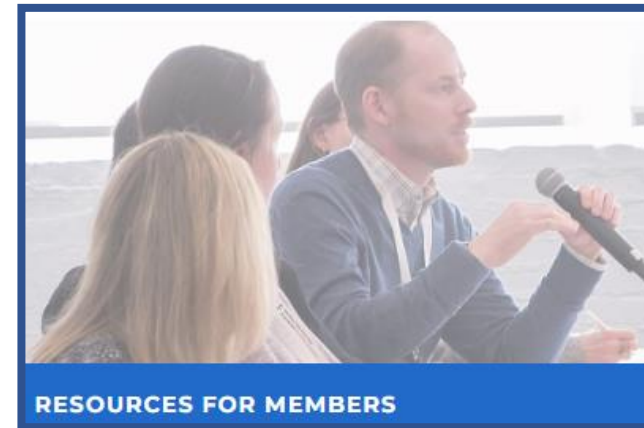
Website

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

HRA HAPPENINGS – FEBRUARY 16, 2023



GRANTS ADMINISTRATION HANDBOOK

Introduction/Overview of the Grants Process

- New to Grants Management and Administration

Sort Resources By:

Search ...

Resource Type

- Document (84)
- Listserv Summary (15)
- Meeting (56)
- Webinar (84)

Issues

- Collaboration (2)
- Covid-19 (17)
- Diversity & Workforce (37)
- Drug/Therapy Development (11)
- Funding (4)
- Grants Management (16)
- Indirect Costs (6)
- Intellectual Property (7)
- Meetings and Conferences (3)
- Open Science & Data Sharing (41)
- Partnerships (12)
- Peer Review (6)
- Strategic Planning (1)
- Workforce (27)

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.

Convenings *(See Increase member effectiveness slide)*

Goal 3: Foster community



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

Goal 4: Strategies

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)



ORCID

Connecting Research and Researchers

Individual organization grants
databases and records



Data curation



HRA
Analyzer

(Members only)

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)

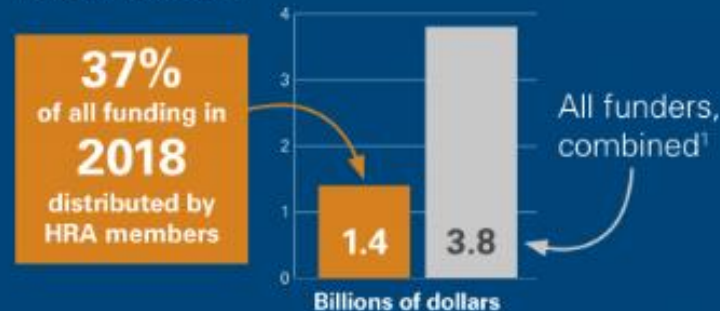
Awards Distributed, 2010 through 2019



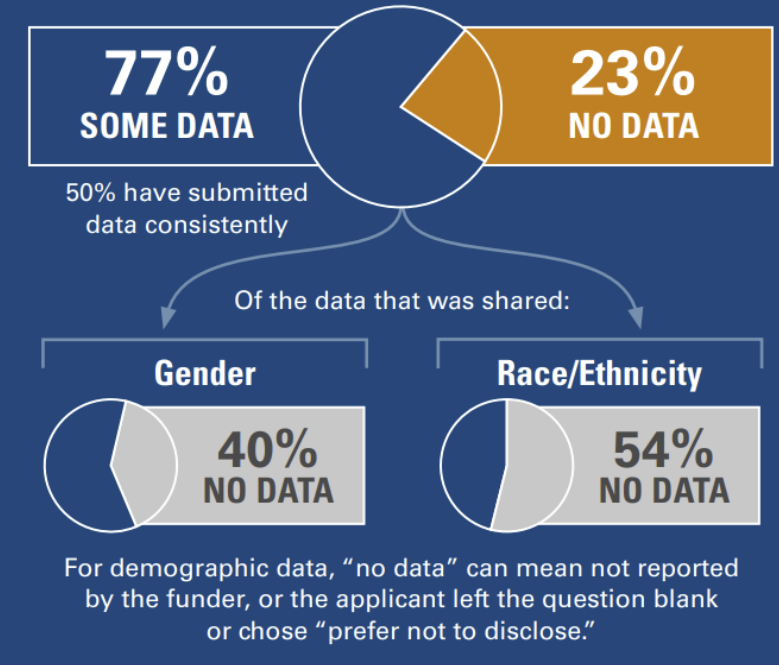
1. Source: Research!America

Snapshot of 2018

Breakdown of funding distributed by the entire nonprofit sector



Average overall reporting rate of HRA members



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