Slide 1. Introduction

Good afternoon everyone. I am Charles Sidman, and I coordinate the research program for Florida Sea Grant. Rhett Register, our communications coordinator, and I would like to thank you for taking the time to view this webinar on Reporting Florida Sea Grant Applied Research and Outreach. Please note that this webinar will be recorded and made available to you for future reference. We will entertain questions after this presentation as to not disrupt the flow of the webinar. To avoid background noise was ask that you please mute your computers until the q/a session.

The National Sea Grant Office is placing increasing importance on how we report the activities, audiences, products and outcomes generated from our research and extension programming.

We understand that the information that you provide in your reports is only as good as the guidance that we provide to you. It is with this in mind that developed this webinar – to provide you with additional guidance on:

(1) relevant metrics to help structure your reporting,

(2) use of our Online Activity Reporting System, and

(3) how to craft project and program accomplishment and impact statements that are used by the National Sea Grant Office to evaluate how successful our program is in meeting goals and objectives set forth in our Strategic Plan.

The funding that we receive to support research and outreach programming that you deliver is contingent on the reporting that we do each year to satisfy National Sea Grant Office information requirements.

With this guidance, we are hopeful that you, our researchers and agents, will be better equipped to help us to effectively convey the many positive outcomes and successes of your research and outreach programming. The information that you provide is shared with program partners, Florida's congressional delegation and that general public, whose tax dollars fund the research and outreach programming that Florida Sea Grant supports.

Slide 2. Presentation Topics

This presentation should last approximately 45 minutes. We will then entertain questions that attendees may have. Although this presentation is geared towards researchers, much of the information is also relevant to our marine agents for their reporting.

The presentation will cover six topical areas:

1. An overview of Florida Sea Grants reporting process and reporting metrics developed by the National Sea Grant Office.
2. Reporting standards set by the National Sea Grant Office

3. A description of Florida Sea Grant's online Activity Reporting System and individual reporting modules that you use to submit information about your research projects and / or outreach activities.
4. Some tips for reporting progress towards attaining the technical objectives of your research projects.
5. Some tips for reporting research project and or program outcomes, defined as accomplishments and impacts.
6. And last, we will review an example of a successful impact statement.

Slide 3. Reporting Process and Metrics

Project Principal investigators are required to submit an interim report at the end of the first year of the project and a final report at the conclusion of the project. The information that you report is facilitated by the use of Florida Sea Grant's Online Activity Reporting System, or OARS. OARS is structured to capture the kinds of information required by the National Sea Grant Program's Planning, Information and Evaluation Resource, or PIER system.

Examples of the information that we report to the PIER system includes:

Activities and audiences, students supported, communications products, accomplishments and impacts leveraged funds, products and tools developed, and economic benefits.

I will provide more detail about these reporting metrics during my description of the various OARS reporting modules.

Slide 4. NSGO Reporting Standards

Over the years, the National Sea Grant Office has required greater detail on justifying and quantifying the attainment of research objectives and describing the outcomes or successes of projects and outreach programming.

1. Reports must justify progress towards attaining project objectives in a manner that a lay audience can understand.
2. Project reports, where applicable, must quantify the economic benefits of the work or programming being conducted. Metrics identified by the NSGO for this include, businesses and jobs created or sustained, economic impacts to an industry or community, estimated wages of people participating or benefitting from the applied research project.
3. A detailed description of how end-users are engaged and participating in the research project (i.e., their role in achieving technical objectives and applying the results).
4. And, where applicable, quantifying the environmental, management and social benefits accrued (i.e., acres enhanced, policy outcomes, and changed behaviors). "Knowledge gained" may be an outcome or accomplishment but it does not justify an impact.

Slide 5. OARS System Overview

I would now like to provide an overview of Florida Sea Grant's Online Activity Reporting System. OARS consists of seven reporting modules that collects information from researchers and extension agents in a manner that is, for the most part, consistent with that required by the National Sea Grant Program's PIER system. Researchers must complete, where applicable, all seven reporting modules. Extension Agents are only required to complete four of the seven modules. The reason for this is that the first three modules are oriented towards research projects. The OARS system allows for the collection, standardization and analysis of information entered by all program affiliates: researchers, specialists and county extension agents.

Slide 6. OARS Home / Login Page

This slide illustrates the OARS system login or home page. The system is password protected and you should all know your login credentials. If you do not, please contact me and I will help you with that.

Login options are different for researchers and extension agents given that agents only need access to four of the seven reporting modules.

Researchers must enter the year that their project began to gain access to the reporting forms for their project. Agents must enter the year that they would like to report activities for.

Slide 7. Main Reporting Page

This graphic shows the main OARS reporting page. You will note that the seven modules are displayed in the banner at the top of the page. To enter information just click on the appropriate module option to display the reporting form.

I typically assign login credentials but the page also has options for changing your password and exporting spreadsheets of the data you entered for each module as individual reports.

The gray bar on the left side of the page provides a summary of the information that has been entered into the system for your project or outreach program.

Slide 8. Project Status Module

This slide depicts the data form for the project status module. On this form you will identify the report type; interim vs. final and set the reporting period – the project dates covered by the report.

Importantly, as with all of the modules, you must save the information that you enter prior to navigating to another page. Also, the OARS system allows for information to be entered throughout the duration of your project (not just after the first or second years). The same holds true for outreach programming activities.

Slide 9. Objectives Module

The objectives reporting form allow researchers to describe progress towards meeting each of the proposed technical objectives. Please note that, as with the other modules, information icons (illustrated by blue circles) describe how to enter information and provide examples of how we would like the information to be entered for maximum effect.

The system is dynamic and set up to allow additional information to be entered to update progress towards meeting objectives during the course of your project. However, you will note that the objectives module has a 2,500 word limit consistent with our desire to have descriptions <u>informative yet concise</u> and written in language that a lay audience can understand.

Slide 10. Students Supported Module

The student's supported reporting form allows researchers to add and change the status of students who are supported by the project. There is also an option to view and edit student information (see option "View existing project supported students" in the banner under Students Supported). Again, this module is dynamic to allow updating as new information is available (e.g., a change in status of graduation). <u>Tip: As with the other modules, in order to save your entries or updates you must click save after modifying any information.</u>

Slide 11. Leveraged Funding Module

The leveraged funding reporting form allows researchers and extension agents to add and view information on new funding that has been obtained related to your Florida Sea Grant supported research or outreach. The "View existing extramural funding option' in the banner allows you to edit or delete records that have been entered in this module.

Slide 12. Outreach Activities Module

The outreach activities reporting form allows researchers and extension agents to add, describe, view, and share activities that have been entered for research and outreach programming. It is important that you make note of your outreach activity type and audiences in attendance when you deliver programming (e.g., conference presentation, workshop, meeting) and the numbers of various audiences listed in question four of the form) because the national Sea Grant Program's PIER system requires that we report against a variety of audiences and activities.

The share feature allows extension agents and specialists (not necessarily researchers) to identify other agents who also participated in the activity – so that everybody gets fair credit for their contribution towards the activity.

Slide 13. Communications Module

The communications reporting form allows researchers to identify any publications that are related to the project (e.g., student theses/dissertations, journal articles, curricula developed, book chapters). The "View existing communications products" option allows researchers to edit and update the status of publications entered into the system (e.g., if a product has gone from 'in preparation' to 'published') during the course of the project. Again, information icons (blue dots with I's) describe the format for reporting these publications.

Florida Sea Grant uses the OARS system to follow-up with researchers regarding publications that may have been initiated during the course of the project but not published until after the project has ended.

Slide 14. Accomplishments and impacts Module

The Accomplishments and Impacts reporting form allows researchers and extension agents to describe and enter the various elements that make up a success story (impact or accomplishment). Questions one and two of the form allow you to briefly describe and quantify (relative to National Sea Grant reporting metrics) the type of accomplishment or impact that you wish to report.

- Questions one and two can help you determine how to best orient the accomplishment or impact statement (e.g., are the results oriented towards policy development, a new model or tool, economic benefit or habitat enhancement. It will also help you to work with your end-user to quantify that metric (e.g., how many acres have been enhanced, number of practitioners receiving).

- Question 4 consists of the three elements of the accomplishment or impact statement. Here you will describe and quantify the relevance, response and results. I will explain this in greater detail in a few minutes.

- Question 5 will allow you to identify up to three primary project partners or end-users who are participating in or beneficiaries of the research or outreach accomplishment or impact.

Slide 15. Accomplishments and impacts Module

This slide illustrates the 'View' option in the accomplishments and impacts module. This will allow you to edit, delete or share information that you entered relative to an accomplishment or impact. Rather than diluting the of your project outcome, it may be advantageous to combine outputs from a set of coordinated activities into a single accomplishment or impact statement. **Here we are looking for quality not quantity.**

For the remainder of the presentation I will concentrate on tips for reporting against project objectives and for reporting accomplishments and impacts.

Slide 16. Tips for Reporting progress Towards Attaining Technical Objectives for Research Projects

As I mentioned previously, the Objectives Module allows researchers to report progress towards meeting each of the proposed technical objectives. The four tips that I provide are also summarized by clicking on the information icons visible in the Objective Modules reporting form.

This is an important component of project reporting and as is also the case for the reporting of accomplishments and impacts should be done carefully, thoughtfully, and with a lay audience in mind.

Importantly, descriptions should be concise yet provide sufficient detail to allow Florida Sea Grant to evaluate progress made relative to the two-year project time-frame and requested invoicing and reimbursement. Reimbursement is contingent on proper reporting and adequate accounting of the required cost share.

Slide 17. Tips for Reporting Project Outcomes

I would now like to shift focus and spend a little time on the reporting of project outcomes defined as accomplishments and impacts.

These statements should be developed in the context of proposed research objectives and quantified according to metrics defined by the national Sea Grant Office that I discussed earlier in this presentation.

Briefly, an accomplishment can be thought of an outcome of a specific project objective or activity (e.g., knowledge gained from a presentation/workshop). An impact is a higher-level accomplishment that relates to how your end-user is applying the products, tools or information generated from your research or outreach in decision-making for broader, economic, societal or environmental benefits.

Slide 18. Types of Research and Outreach Program Outcomes

The National Sea Grant Office has defined a set of metrics that Florida Sea Grant must quantify from research and outreach programming. These include:

- Jobs created or sustained
- Businesses created or sustained
- Economic benefit
- Management tool or policy developed
- Management decision made
- Habitats enhanced
- Behavior change
- Workforce development training

An accomplishment or impact should not describe a paper published, a conference presentation, a student supported, or an award, grant or prize received. Much of this information is collected in different OARS reporting modules.

To address metrics identified by the National Sea Grant Program it may be necessary for project investigators and extension agents to confer with project partners and end-users while developing and quantifying the relevance, and results sections of accomplishment or impact statements.

Principal investigators funded by Florida Sea Grant must strive to generate accomplishments and, if possible, an impactful outcome consistent with national Sea Grant program metrics, though it is accepted that impacts may occur beyond the life of the project.

Slide 19, Impact Critique

Finally, I would like to share an example of an outcome that we submitted last year as an impact. In the interest of time I will not read it verbatim but you will note that the relevance statement is oriented towards addressing an important management need in Florida Bay.

Slide 20. Impact Critique

The response statement describes how the research was conducted and the role of a key project partner.

Slide 21. Impact Critique

The results statement are quantified in terms of habitat enhancement and its role in developing a management plan for Florida Bay.

Slide 22. Elements of a Strong Accomplishment or Impact Statement

This final slide summarizes some important qualities of strong accomplishment or impact statements.

The relevance section should:

- Be oriented towards and end-user issue, defined in the proposal narrative.
- Quantify the magnitude of the issue in social, environmental or economic terms.

The response section should:

- Describe project activities and target audiences.
- Identify NSGO related metrics for measuring success.
- Identify and describe the role of partners and end-users.

The results section should:

- Quantify the social, environmental or economic benefits according to NSGO success metrics.
- If possible, include testimonials from end-users to support outcomes.

This concludes the webinar. Thank you to those of you who attended. We can now take any questions or comments you may have.