FEDERAL DEMONSTRATION PARTNERSHIP
Redefining the Government & University Research Partnership

FDP MEETING REPORT/SUMMARY

Online Web Form Section Name	Session Info
Session Name	FDP Expanded Clearinghouse
Point of Contact	Lynette Arias, Pamela Webb

Working Group Activities/Outcomes/ Progress to Date	• The Pilot has moved into an initiative and includes a Steering Committee.
	• Publications/Communications: Final Pilot Report, Press Release, NCURA Article, NCURA regional meetings with more requests for publicity coming
	• Almost all FDP members have joined the Expanded Clearinghouse - 200 profiles total to-date!
	• Sample pushback language has been updated and is available on the website.
	• Website has been updated
	   o Pilot information is being archived
	• Instructional videos are available for the Expanded Clearinghouse with a few more coming
	• Significant codebase updates, though users will not see any changes, in order to improve maintainability and sustainability
	• Data Export feature extensively reviewed but will not be offered
	   o Duplicates API functionality
	   o Reduces references to website, increases risk of old/bad data
	   o Enhanced search tools will be coming to the website in the future
	• API will go live this month
	   o 3 tokens have been issued to Beta testers
	   o Access may be requested through the Data Access tab on a published profile
	• Financial Questionnaire
	   o Current list on FDP website is exhaustive and is being consolidated
	   o Progress to-date
	     ▪ Goal to create a document that is widely usable
	     ▪ Creating a survey to be sent to Pass through Entities to get a better understanding of interest and challenges

Agenda/Discussion Points for this Meeting	Future planning, stabilizing and standardizing the Clearinghouse processes. Where do you struggle in keeping up your profile? Areas highlighted as reminders for profile maintenance/updating: • SAM Registration – make it part of your processes to update the Expanded Clearinghouse when SAM is updated • Audit Section – Add the new audit and then move the previous year's audit to "Single Audit Report from previous Fiscal Year" field. • Contacts Section – please keep these updated • Current data needed at all times in Profiles to ensure integrity

- o   Creating escalation processes
- Internal issues due to decentralization
    - o   Example, when SAM is updated by one person, that action may not be communicated to the Expanded Clearinghouse contact; suggestion to copy other Profile contacts so the other person would be notified when expiration date is approaching
- Some assurance expirations aren't being renewed by government entities on time
    - o   Suggestion is for users to update the profile with Comments that the assurance is out of date, but that the institution is waiting on the governmental entity
- As users find out-of-date data, contact the institution to let them know that their information is out of date.
- Data Analysis
    - o   Scrubbing the data to look for consistency among administrative reviews and how fields were answered
    - o   How the data can benefit FDP as a whole? (**not meant to replace organizational subrecipient monitoring requirement)
        - Data could be used to help demonstrate the need for a Single Audit Safe Harbor
        - What do organizations think about the data being used to support FDP in this fashion?
        - Other Suggestions for ways to analyze data that might be helpful?
            - Clarify certain questions such as audit findings in R&D Section vs. overall.
            - Form for enhancement requests (for now, send ideas to fdpechelp@gmail.com)

- Financial Questionnaire Thoughts?
    - o   Audience response – must reduce administrative burden
    - o   AQ: Would FQ be shared? R: That is to be determined
    - o   AQ: Can we see a draft before participating? R: Yes
    - o   AQ: Please send on subaward listserv, in addition to EC listserv. R: Lynette noted that she foresees the FQ pilot following the same path as the Expanded Clearinghouse with cohorts
- Final Remarks – please share the press release!

Key Decisions Pending	- Mandatory for all FDP members? At this point it is moot, but is something to consider in future phase. - Inviting non-FDP organizations to join. - More Federal Involvement? We'd like to start conversations with SAM.gov and the Federal Audit Clearinghouse. - Financial Questionnaire added to Clearinghouse?

	• FCOI Clearinghouse to be added as well? • Who should own the system/data? • What data fields are irrelevant or not being utilized by the institutions?
Participation	Approximately 100 attendees, actively participating in user group type discussions.
Moving Forward Key Risks/Issues Identified	Should we allow non-FDP organizations to join? A significant amount of thought must go into ensuring the integrity of the data, among other things.
Meeting Summary	The session covered the following: • Recent press releases and other communications and marketing of the Clearinghouse, • Reviewed parameters for updating profiles and identify key areas currently causing confusion or delays • Provided status of all FDP members who have become Participating Organizations • System updates including: status of Automated Programming Interface (API); data dictionary; possible data export; SAM.gov mapping; and other enhancements • Future planning including: status of adding additional members, financial questionnaire pilot, partnering with federal agencies on what we have learned
Volunteer Opportunities	Participate in Financial Questionnaire pilot. Please email Sara Clough sarac@austin.utexas.edu or Lesley Schmidt Sindberg schm1421@umn.edu