

Guidance on Updating Scorecard Turn the Curve Plans

When updating your Common Metric values and Turn the Curve (TTC) plans, we suggest using one of these two options:

1. Add the label “2016 Updates” to the existing TTC notes and enter the additional information in a different font or color.
2. Add a new note labeled “2016 Updates” using the default note editor function.

**Enter New Common Metric Values for 2016**

Click on Red PM box; Select Add data Values from the drop down and add 2016 data values

Future	Actual Value	Target Value	Custom Column	Baseline / Comments
2016	54	75		
2015	50	75		
2014	45	75		
2013	40	75		

**Update the TTC Plan**

**Option 1:** Steps to Label updates for 2016 and enter then into the text fields in a different font or color

## Step 1 – Enter the Notes page

Sample Common Metrics scorecard with 2016 data and text options

Export Edit

CTSI

P CCTR Careers in Clinical and Translational Research - (Copy)

PM CCTR % of KL2 graduates who are currently engaged in clinical and translational research - (Copy)

Click on the PM text to enter the Notes page

Time Period	Actual Value	Target Value	Forecast Value	Current Trend	Variance	% Change
2016	56%	70%	—	↑ 3	40%	↑
2015	50%	70%	—	↑ 2	25%	↑
2014	45%	70%	—	↑ 1	13%	↑
2013	40%	70%	—	→ 1	0%	→
2012	40%	70%	—	→ 0	0%	→

Story Behind the Curve Partners What Works Strategies All Data Showing...

Story Behind the Curve

(Underlying Causes by Priority. Description includes positive and negative, internal and external, and current and anticipated causes.)

**Lack of Mentor Training and Experience** Lack of mentor training or experience has led some mentee projects to drift from their timeline or not achieve intended goals. Mentees emerged less prepared to conduct independent research. Mentor dissatisfaction or frustration caused them to leave the program before they had the opportunity to master the role. Their absence created a gap in mentee guidance and led to stalled research projects. Those departments that fund fellowship research and support strong mentor and mentee relationships are leading to successful research careers. (negative, positive, internal, current)

**Insufficient Knowledge about Available Funding and Opportunities for Collaborations** It is difficult for graduates to identify potential collaborators and network with other program alumni in research. This affects their ability to join existing collaborations, create new collaborations and secure funding. There is also a general lack of knowledge of available funding. (negative, internal, external, current)

## Step 2 – Start editing

P Careers in Clinical and Translational Research - (Copy)

PM CCTR % of KL2 graduates who are currently engaged in clinical and translational research - (Copy)

Export Options Edit

Actual Value

56%

Target Value 70%

Forecast Value

Actions 3

Files 0

Show Data Values

Story Behind the Curve

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Use the Pen icon to update notes

### Step 3 – Edit/ Update and Save

Story Behind the Curve Cancel Save

⏪ ⏩ B I S [Icons] A A [Icons] X

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Click on Save once updates are entered to save your work and updates.

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**The Junior Faculty Forum Program** The Junior Faculty Forum program, introduced in 2013, continues to provide group support in grant writing and helps trainees and graduates acquire funding and research positions within and outside the organization. The Forum also reinforces the workshop style core courses that help trainees build their own research projects. (positive, current)

**Workshop Style Grant Writing Courses** Workshop style grant writing courses, taught by experienced faculty, help trainees build practical and applicable research skills. (positive, current)

**Personal Reasons Affect Graduate Interest in Research Careers** The continuous process to secure funding causes undesired stress. Graduates have multiple personal responsibilities including childcare and eldercare and find it difficult to manage research time, clinical time, and family responsibilities. Graduates decide to apply skills in different roles, e.g., research management. (negative, internal, external, current, anticipated)

**Factors That Need Additional Information**

We will gather additional information about the issues graduates face around paid time off and benefits when they are involved in multiple research studies.

2016

This is new Story Behind The Curve for the year 2016 written in a different font color

Update your notes in a different font color

How it looks after updates-

Careers in Clinical and Translational Research - (Copy)

CCRE % of KL2 graduates who are currently engaged in clinical and translational research - (Copy)

Export Options Life

Year	Actual Value	Target Value
2012	~45%	56%
2013	~48%	56%
2014	~50%	56%
2015	~53%	56%
2016	56%	56%

Actual Value: 56%

Target Value: [Input field]

Report Value: [Input field]

Actions: [Dropdown menu]

Filter: [Dropdown menu]

Show Data Values

Story Behind the Curve

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2016

This is new Story Behind The Curve for the year 2016 written in a different font color (Copy)

Partners

**Training Program Leadership and Staff** - Leadership and staff can assist in developing and implementing additional programs and resources.

**Mentors** - Mentors will provide insights on the needs of new mentees for training and creating fostering mentee relationships.

**Program Graduates** - Graduates will help identify networking opportunities that best fit their needs. They can also provide insights on work-life balance issues and successful personal and professional strategies.

**Research Administration and Development Office staff** - Staff can assist in creating a system to identify and communicate a variety of funding opportunities.

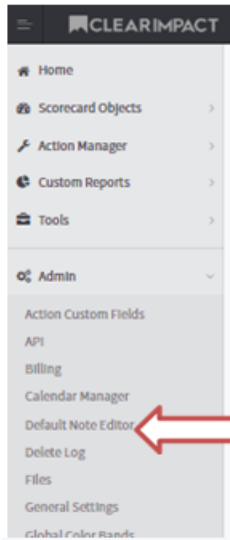
**National Leaders to Facilitate KL2 Networking** Leaders can facilitate activities to foster networking at national events.

2016

This is new information on Partners for the year 2016 written in a different font color (Copy)

**Option 2:** Add a new note labeled “2016 Update” using the default note editor function.

*Step 1 – Create a new note*



To add the “2016 Update” notes tab  
go to Default Note Editor under  
Admin on left side gray panel.

Then Click on Manage Note Types.  
Click on Add New and input “2016  
Updates”.

Use the 3 dots on left side of new  
note and shift to adjust the note  
order.

Click on Update Note Sort Order

## Configure Default Notes

Manage Note Types

Edit a scorecard object below to configure what notes are added to it when it is newly created. Notes can then be configured on a per object basis. Changes to the settings below will not affect existing notes.

Object	Actions
Result	Edit
Indicator	Edit
Program	Edit
Performance Measure	Edit

## Note Types

+ Add New      Update Note Sort Order

Note Type	Actions
Data Collection Notes	Edit   Delete
2016 Update	Edit   Delete
TEST	Edit   Delete

## Step 2 – Add the Note to your TTC plan

The screenshot shows a multi-step process for editing a TTC plan note. Red arrows indicate the following actions:

- Click on the text portion of PM (pointing to the title bar).
- Enter the TTC plan notes page and click on Edit (pointing to the Edit button).
- Click on Notes within the editing page (pointing to the Notes tab).
- Click on Add another Note and select your new note "2016 Update" from the dropdown (pointing to the dropdown menu).
- Click save and Exit (pointing to the Save & Exit button).

Click on the text portion of PM

Enter the TTC plan notes page and click on Edit

Click on Notes within the editing page

Click on Add another Note and select your new note "2016 Update" from the dropdown.

Click save and Exit.

How it could look –

The screenshot displays the final content of the TTC plan, organized into two sections:

- Strategies**
  - Mentor Training Program:** We will develop a mentor training program. The program will focus on building the mentoring relationship, maintaining effective communication, defining and implementing the mentee's goals and timeline, aligning expectations, understanding cultural differences, and fostering independence. The program will be conducted twice each year beginning in January 2016. Program faculty will include two part time mentor trainers and a part time administrative assistant. Funding will be allocated from the existing budget.
  - Networking Forum:** A networking forum for trainees and alumni will be developed to foster connections among alumni researchers, research teams, potential collaborators and trainees. The focus will be on identifying funding and collaboration opportunities and strengthening the ability of alumni and trainees to maintain research careers. There is no current funding for the program. Education Program Director will explore potential resources.
  - Workshop Style Courses:** Maintain and expand these courses to foster applied skills. The Education Program Director and Curriculum Committee will identify additional workshop courses and work with course faculty. The change is expected to be budget neutral.
- 2016 Updates**
  - Story Behind The Curve:**
  - Partners:**
  - What Works:**
  - Strategies:**