

## AMSI RESEARCH

### AMSI Scientific Workshop Program Review Report

#### Introduction

AMSI's Research and Higher Education Committee commissioned a review of the AMSI Scientific Workshop Program. The focus of the review was on the range of events that AMSI supports, the way in which that support is restricted to specific expenditure and the purpose and effectiveness of the program.

Submissions were called for from the mathematical sciences community to consider four aspects of the program:

- Application and reporting processes
- Type of program - new or recurring conference, (joint) workshops, lecture series, longer programs
- People funded - eminent speakers, early career researchers, speakers from developing countries, gender balance, geographic balance
- Activity funded - travel, accommodation, family support

#### Background

The Workshop Program was one of AMSI's first initiatives and it has had a major impact on our research environment. Peter Hall was the inaugural chair of AMSI's

Scientific Advisory Committee (SAC) which assesses applications for workshop sponsorship. Jon Borwein replaced Peter Hall in 2010 and is the current chair of the SAC.

In 2006 the AMSI Member Travel Funds were introduced by Phil Broadbridge to support workshop attendees from AMSI members without burdening the workshop organisers with the task of distributing travel support.

In the past the program has sponsored hot topic workshops put together at short notice and theme programs lasting weeks and months, however in recent years the program has settled in to sponsoring more or less conventional workshops across the entire spectrum of the mathematical sciences. These workshops number around 20 per year and run for between 2 and 5 days.

AMSI funds each of these to a maximum of \$10,000, with the selection process carried out by the AMSI Scientific Advisory Committee (SAC). For amounts below \$5000, the decision is made by the SAC Chair, the AMSI Director, and a relevant SAC member, rather than the full SAC committee.

There is a joint application process with the Australian Mathematical Society and ANZIAM for their own workshop programs and two rounds per year. These programs do not pool funds but the AMSI SAC advises the Society and ANZIAM on the quality of the applications. Of course many applications are directed to AMSI alone.

In addition, the AMSI Member Travel Funds support workshop attendees from

AMSI members without burdening the workshop organisers with the task of distributing travel support.

### **Pre-Review structure (2012-2015)**

AMSI itself restricts its direct funding to the travel and accommodation support of a limited number of invited speakers, typically up to five per workshop. These individuals are usually internationals with a significant track record of achievement. There are many other ways in which AMSI could support workshops but AMSI has chosen to do it this way because it delivers proven benefit and because this single focus is clear cut for all parties.

# Summary of Responses to the AMSI Scientific Workshop Program

## Review

### Responses Received

Forty-two online responses and three direct email responses were received.

### Key Findings

There was broad agreement that the program is very important for mathematics in Australia, and broad support for the current 2-5 day workshop format.

There was also broad agreement that the decision making process was effective and that there was little perceived bias in the workshops supported.

## The Program

### Funding

Around 50% of respondents would prefer the program to support not only “eminent” speakers as judged by citations, etc... but also support young rising stars.

Some additional suggested criteria were the fit of speaker with focus of workshop and the proposed outcomes of workshop, and reputation as clear and accessible speaker.

As for broadening the items that AMSI supports (beyond travel and accommodation of speakers), respondents generally thought this was a good idea, but only if additional funds were available.

Around 50% of respondents felt that there are too many constraints on how the funding can be used, and the funding was too inflexible.

A number of respondents suggested AMSI giving a fixed amount of support, which could be used in the most productive way by the organisers.

Examples given were:

- Depending on individual circumstances, it may be easier to obtain funds for some speakers than to obtain support for venues or catering.
- Organisers may wish to partially fund more speakers, rather than almost fully-fund a smaller number of speakers; or conversely, some speakers may require full funding.

- If an eminent speaker can fund themselves, the surplus money could be used elsewhere, for example to support younger speakers.
- A supported speaker may wish to choose e.g. cheap accommodation to use the remaining funds to support a longer stay, a per diem, etc...

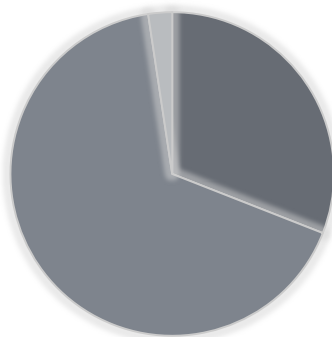
A respondent from Perth noted that domestic student participants of two-day workshops in Perth would need an extra night of accommodation.

**Should AMSI broaden its current workshop policy of funding the travel and accommodation of eminent speakers?**



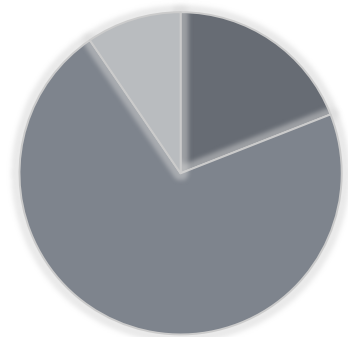
■ Yes

**Keeping in mind the limited amount of available funding, should AMSI consider re-allocating funds to activities other than 2-5 day workshops?**



■ No

**Is there any bias, real, perceived or inadvertent, in AMSI's funding program?**



■ No response

## Miscellaneous

- Two respondents suggested that AMSI encourage (but not mandate) the data streaming and/or recording of workshops where facilities allow to encourage greater participation, and increase impact (e.g. outside universities).
- There were two respondents that suggested AMSI support recurrent workshops; arguments put forward were that recurrent workshops may attract higher quality participants over time and AMSI may wish to support certain areas of "national benefit".
- Some respondents noted that to insist on broad national representation in a given workshop is not necessarily reasonable if expertise in an area is limited to a small number of geographic locations.
- There were a couple of respondents that suggested AMSI encourage supported speakers to give public lectures.
- A couple of respondents would like to see greater insistence on attendance of students, in particular higher-level undergraduates.

## The Process

*Around 30% of respondents felt that both the application and the reporting requirements were too detailed.*

There was a suggestion it could be made fully online.

There were suggestions that the selection committee include someone with industrial mathematics background to assist with workshops in this area, and that the selection committee could be rotated over time.

Some respondents had negative experiences regarding feedback on their application.

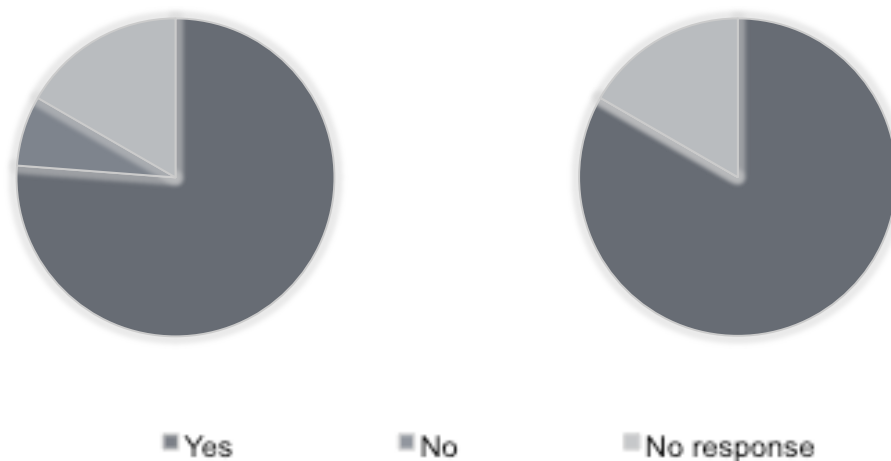
Examples include:

- An ambiguous response that the organiser took to mean support but later found out that the workshop was still under review.
- Perceived unfriendly response and the raising of withdrawal of funding over a minor error in the application.
- Responses to specific queries by direction to a weblink, which the organiser had already read.

**Is AMSI's decision-making process effective, i.e. does it achieve the objectives of the program?**

**Does AMSI's decision-making process achieve the objectives of the program in a timely manner?**





## Recommendations and Responses

The Research and Higher Education Committee reviewed the responses and formulated some recommended amendments to the AMSI Scientific Workshop Program. The Scientific Advisory Committee (SAC) conferred with the review committee and agreement was reached on the following changes to the program.

**Recommendation:** Organisers must substantiate funding requests and ensure diversity balance in the meeting.

**Response:** *Accepted*

**Action:** *The Committee ensures that workshop organisers adhere to the AMSI R&HE diversity policy when reviewing workshop applications and provide recommendations to increase diversity at sponsored events. In particular the*

*Committee require that measures that will be taken to boost female participation are clearly identified in the application and strongly recommend the inclusion of at least one woman on the organising committee as this has been shown to boost female participation.*

**Recommendation:** Removing the reference to eminent speakers and support 'rising stars'.

**Response:** *Accepted*

**Action:** *The following change has been made to the wording of the eminent speaker requirements. "A clear case must be made for each of the speakers based on their impact on the field. Speaker seniority is not a necessary condition of support."*

**NB:** *the maximum number of supported speakers is usually the same as the duration of the workshop in days but the main thing is that these speakers are significant keynotes and not just attendees giving a talk.*

**Recommendation:** Amend the funding structure so that once benefit is established, organisers are allocated a lump sum to spend on an activity **OR** Open a percentage of the supplied funding to discretionary spending by the event organisers (20-25%)

**Response:** *Accepted*

**Action:** *AMSI workshop funding now has two components:*

1. *The original component for speaker support*
2. *The new component for discretionary event support.*

*The new event support can be used at the discretion of the organisers on expenses directly related to the workshop but NOT on per diems or business class fares. Typically this amount will be up to 20% of the approved total (no more than 10% of this can be used for expenses other than travel and accommodation). This enables organisers to negotiate with the speakers so as to maximise discretionary spending when it's required. The rules linking % airfare and number of night's accommodation to workshop duration must be respected in the use of these discretionary funds.*

*NB: Organisers can also apply to change the funded speaker if funding becomes available from an alternate source.*

**Recommendation:** Allow funding of recurrent workshops

*Response: AMSI does not generally fund recurrent national workshops but seed funding to establish new series is possible.*

*Decision: Funding rules will be relaxed to incorporate seed funding for new workshop series, the case must be made for the individual workshop. Also recurrent international workshops which visit Australia from time to time may be supported.*

**Recommendation:** Review AMSI funding in relation to funding of AustMS Special Interest Groups

*Response: Accepted*

*Action: The AMSI SAC is in discussion with the AustMS Council to determine workshop funding allocations in relation to AustMS Special Interest Group funding.*

**Recommendation:** Reduce the reporting requirements

*Response: The Committee will review and streamline the reporting requirements. The information collected in the reports is important as it provides an evidence base that is used when approaching organisations for funding and provides important evidence supporting the formation of the National Research Centre.*

*Action: AMSI has reviewed and amended the reporting requirements and developed a new online application (live now) and reporting process (live early 2016) that streamline the application and reporting processes and reduce the amount of time and effort required to submit applications and reports.*

**Recommendation:** The SAC committee should invite a person from an industrial mathematics background to join the committee

*Response: Accepted*

*Action: The SAC are seeking a committee member with an industrial mathematics background to join the committee.*

**Recommendation:** Consider funding of ECRs from developing countries

*Response: Accepted*

*Action: The SAC are very supportive of this recommendation and will in the long-term approach the Academy of Science and other similar organisations to discuss implementing funding schemes to promote the involvement of ECRs from developing countries.*