D2.3 Report on the user feedback monitoring strategies

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Lead beneficiary	CNRS
Authors	Ariane Dubost, Matilde Oliveri
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1. Description of deliverable D2.3

This report aims at analysing various user feedback monitoring strategies found relevant for the pilot access programme and including recommendations for user feedback processing. The document was prepared in the context of the activities of the ATMO-ACCESS INFRAIA project aiming at offering Sustainable Access to Atmospheric Research Facilities. In particular, Work Package 2's goal is to develop strategies to further engage different user communities (academia, public and private sector), by identifying their needs, establishing targeted communication of the access offered and evaluating the adequacy of ATMO-ACCESS. CNRS is in charge of Task 2.3 of this WP aiming Monitoring of feedback from the users of the pilot access.

This report will feed in MS2.3 "Recommendations for user feedback processing" which will help develop a coherent feedback processing strategy in close cooperation with WP9 and WP10.

2. Definition of user feedback

User feedback consists of information collected directly from users about their reactions to a service or an experience. In the frame of ATMO-ACCESS, feedback will be collected from the users of the Transnational access (TNA) and Virtual access (VA) services. It will be used to regularly evaluate the performance and success of the offered pilot access calls, monitoring notably the level of satisfaction for the services accessed, the current access needs, easiness of the overall access system, the difficulties encountered, the level of raising awareness, and the success rate. Regular analyses and proper processing of the user feedback related to the offered access shall be an input for the development of user strategies and tailored user services (see Figure 2-1).
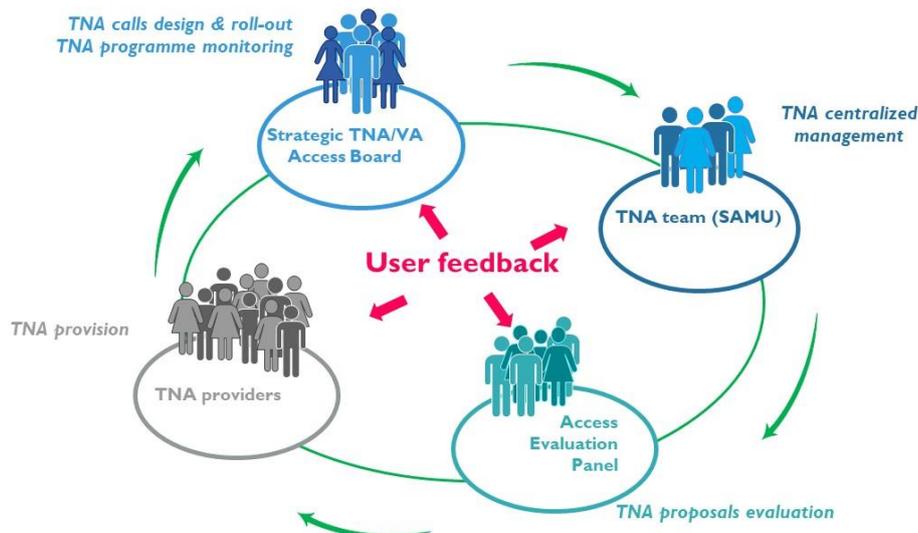

Figure 2-1: Illustration of the ATMO-ACCESS TNA programme implementation.

Recommendations will be executed by all the actors involved in the TNA implementation as detailed in Table 2-1 below :

- Strategic TNA and VA Board will use the feedback to design future calls
- TNA Team will improve service management where applicable.
- The evaluation process could be updated if found relevant by users and supported by the Strategic TNA Board and the TNA Team
- TNA providers will be informed of the feedback given by users, especially for follow up where relevant
- WP2 Team to communicate efficiently calls and modalities to users

Table 2-1: Description of the use of the information collected by actor type

Actors involved	Role in the project	Use of information collected
Strategic TNA/VA Access Board (STVB)	*The Board decides on the nature, scope and scheduling of the calls.*	*Design future calls and adapt modalities if necessary*
TNA team (SAMU)	*WP9 TNA management team, in charge of managing the overall TNA process.*	*Improve TNA management process where applicable*
Access Evaluation Panel	*Large panel of mainly independent experts mobilized for reviewing TNA applications*	*Adjust to review timeline and content where necessary*
TNA providers	*Facilities/installations managers responsible for serving the users selected for TNA.*	*Adapt onsite support where applicable*
WP2 Team	*Communications officers of the 3 RIs*	*Insights on communication effectiveness*

User feedback can be collected via different means such as:

- User feedback questionnaire: this option is the easiest to implement in the project and consists of an online form to be filled in by TNA users 3 weeks after access completion[1]. The answer to the feedback questionnaire is part of the mandatory TNA post access documentation for getting TNA Travel and subsistence expenses reimbursed.
- User feedback workshops: workshop gathering users following the completion of TNA visits could also be envisaged. The users could present the outcome of their research project, share their experiences and propose improvements. Such workshops could be organized around a specific theme in a virtual or hybrid format. Users could also be invited to share experiences during the project annual meeting.
- Success stories: collection of success stories from satisfied users showcasing their testimony in a few sentences is also an interesting way of showcasing the benefit of access.

3. Organisation of user feedback collection in other projects

3.1 User Feedback in the RIs participating to ATMO-ACCESS

User feedback questionnaires were not distributed after access completion in most of the past projects on which ATMO-ACCESS is building upon. Indeed, in ACTRIS FP7 and ACTRIS-2 users had to fill in a questionnaire after access completion but on factual data (such as number of users, number of access days, number of instruments etc). The user experience was not assessed, and no free text comment box was added to the form.

EUROCHAMP-2 and EUROCHAMP-2020 projects had a similar functioning, collecting factual information from users, such as resumes of the scientific content of TNA projects, their potential future impact and their dissemination plans. No focus was given on collecting feedback from users or access providers on the overall access experience.

In ACTRIS IMP TNA programme, the users' perspective is currently collected via a post-access feedback questionnaire (accessible online: ACTRIS IMP User Feedback Questionnaire). The answer to the questionnaire is part of the compulsory post-access documentation and is compulsory for the users to get reimbursed for Travel and subsistence. The questionnaire consists of questions on the access conditions, quality and experience to improve and facilitate the access process for the users. This feedback collection is crucial to adapt the services offered to the users' needs and the overall access experience.

3.2 Insights from other RIs

In order to get further insights on user feedback collection, the representatives of RIs involved in ATMO-ACCESS Scientific Advisory Board (SAB) or in past infrastructure cluster projects were contacted, to share their experiences and best practices. The outcomes of such interviews are detailed in the paragraphs below.

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[1] As described in ATMO-ACCESS MS40: Description of application, review and selection process for TNA to ATMO-ACCESS facilities

3.2.1 Instruct ERIC

Instruct-ERIC (https://instruct-eric.eu/) is a pan-European research infrastructure in structural biology, making high-end technologies and methods available to European researchers, with the aim to promote innovation in biomedical science.

In Instruct ERIC, all TNA proposals are managed using an online system call, "ARIA", that manages applications from submission to completion, including feedback. Once the research visit or remote access has been indicated as completed by the facility access provider, the system sends an automatic email requesting feedback to both the **facility access provider and the user**. The email has a link to the online system, and it lands on a questionnaire. The feedback is also reachable at the user and facility dashboard. Reimbursement of costs requires both forms to be filled. In addition, an ARIA user group for feedback on the system was also put in place.

User feedback is included in an access report, which is analysed three times per year by the access committee. The management team also uses the feedback to identify issues that need correcting.

Success stories and scientific highlights are collected on the RI website and promoted through social media (see https://instruct-eric.eu/scientifichighlights/). Stories are selected when highlighted by the facilities, according to the topic (COVID19, cancer) and the technology development.

3.2.2 EMBRC

The European Marine Biological Resource Centre (EMBRC, https://embrc.eu/) is a European research infrastructure that provides researchers and companies with access to marine organisms and the facilities to study them, including experimental facilities and technological platforms.

In EMBRC, feedback is collected through two different channels:

- feedback from users of the TNA programme (of the ASSEMBLE Plus project) is collected according to the standard EC survey. The form has been modified and integrates the EC survey into a custom survey in order to: a) collect the feedback directly to have direct access to the answers of TNA users and analyse the outcomes; b) to enrich the survey with more specific questions about the TNA programme. The TNA survey can be found at this link. For the TNA programme, the feedback questionnaire is mandatory for the users, in order for them to receive the reimbursement of the travel and accommodation expenses.

- the EMBRC feedback questionnaire is integrated in the management access system. A mirrored version is available at this link. For access to EMBRC services, the survey is not mandatory but it is still an integral part of our "access workflow". Despite the fact that reminders to fill the questionnaires are sometimes needed, users are generally keen to give their feedback, in particular when filling the "free comment" field. This is where most of the feedback is collected, not always caught with the standard previous questions.

In both cases, the feedback of the users is collected by the access officer at the Head Office. A discussion on the identified issues is raised during the meetings with the liaison officers (country representatives) to propose solutions.

Regarding success stories, users who evaluate the "Overall appreciation of the services provided" as "good" or "very good" are contacted by access officers and are asked to send their feedback, inviting them to answer questions such as:

- What is the context of your research?
- Why did you apply to this call (if any)?
- What were the benefits/results of the access to the EMBRC services for your project?
- How was your experience as a user?

The access stories are featured on the webpages of the ASSEMBLE Plus and EMBRC websites.

3.2.3 ENVRIplus

The ENVRIplus (https://www.envriplus.eu/) TNA programme aimed at promoting physical access and use of multi instrumented observation platforms for multidisciplinary research. A feedback survey was sent to the ENVRIplus TNA users (accessible online at: ENVRIplus Post Access Questionnaire). The questionnaire was used to investigate and analyze the user needs for interdisciplinary research and tailor the opportunities, fostering a bottom up approach. The short questionnaire consisting of 12 questions assessed user experience and needs. Furthermore, it aimed at improving the future implementation of access to world-class facilities among collaborating environmental research platforms based on the collected feedback. Users were also invited several times to ENVRI annual meetings (ENVRIweeks) or to the ENVRI communication booth at conferences like EGU, to present the results of their TNA and their experience as users. The outcome of the TNA pilot programme and feedback collected are detailed in ENVRIplus D11.4[2].

4. ATMO-ACCESS user feedback collection and monitoring

In ATMO-ACCESS, a specific feedback process has been set up, mainly based on the experience from other related projects. The process is in its initial phase, and is flexible to evolve and adapt during the next few years. TNA users have to fill in the ATMO-ACCESS user feedback questionnaire in a timely manner (usually no later than 3 weeks after access completion) as part of the post-access requirements before being eligible for reimbursement of travel and subsistence costs. At the moment (M12 of the project), the feedback questionnaire is done via an online form. In the future it will be integrated to the PASS access management platform, with automatic reminders that could be sent to the TNA users. In PASS, the user feedback will most likely be coupled to the final activity report in the last phase of the access process

The questionnaire is built on different sections: general information, communications and interest of TNA to support the project, feedback on access services (rating and free text comments), feedback on facilities services (rating and free text comments), general access process assessment and a final section devoted to the TNA Carbon Footprint assessment[3].

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[2] ENVRIplus Deliverable 11.4

[3] For more information on ATMO-ACCESS TNA footprint assessment,see ATMO-ACCESS MS 56.

Table 4-1 below summarizes the information collected in the questionnaire and how it could be useful to the ATMO-ACCESS TNA actors.

Table 4-1: Categories of information collected in the ATMO-ACCES questionnaire and their relevance to other actors.

Category	Item	Description	Actors interested in the feedback
Advertisement and calls	**Call information & Outreach**	How users are informed of the call	WP2, to adapt communication strategies to attract "new" users, different communities Strategic TNA/VA Access Board (STVB), to adapt the strategy of future calls Access providers from single facilities
	Practical information	documentation, FAQs,	WP2, to improve the way key messages are shared
Access services	**Application forms format**	length, information required, easiness	TNA management team (SAMU), to improve the application documentation
	Importance of TNA funding	importance of TNA funding in the realisation of the research project	Project Coordination, for potential incentives in TNA calls on specific topics EC, to help evaluate the impact of funding the TNA initiative

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	Interactions between users, SAMU and providers	Easiness and length of the access process	TNA management team (SAMU), to improve the application documentation
	Quantity of post-access documentation required	Easiness and length of the access process	TNA management team (SAMU), to improve the application documentation EC, to adapt the TNA required documentation
Facilities services	**Organisation of the access, logistics/ administrative onsite**	Easiness of the access modalities for the user	Access providers from single facilities, to improve the services and on-site support offered
	Scientific and technical support during access	Satisfaction on the service offered at facility	Access providers from single facilities, to improve the services and on-site support offered
Overall process	Overall satisfaction	Satisfaction on the TNA offer and implementation	All actors listed above
	Benefits / new discoveries	Users' perception of the added value represented by the TNA offer	All actors listed above WP8, for general recommendations at the project' end
	Lessons learnt, improvements	Suggestions	All actors listed above

| Publications | Involving the access providers in the collection of information on publications resulting from access could be a way of gathering more precise information. | TNA management team (SAMU) and local access providers, to ensure that TNA support is adequately acknowledged, and that effort is rewarded |

5. Recommendations and conclusion

Based on the experience gained in past EU projects, and thanks to the interviews obtained from other RIs involved in providing access, a number of recommendations can be listed and could be tested in ATMO-ACCESS:

1. Add one question in the feedback questionnaire to ask the user's agreement for joining a "user mailing list' - to receive information on future calls, participation to future feedback surveys beyond the ATMO-ACCESS project duration (as recommended in ATMO-ACCESS D2.1[4])

2. The ATMO-ACCESS current questionnaire seems more suited to users having had physical access; in the future calls, specific relevant questions related to remote and/or combined access should be included following a branch logic to avoid overloading users with too many questions. PASS should allow this possibility.

3. Currently, no particular feedback is gathered from users accessing virtual services. A specific action plan should be designed for the users of the virtual services (especially those of the Data Centres from the three RIs involved in the project). Having pop-up questions to users downloading the datasets, or an online questionnaire to data users could be envisaged.

4. Regular reports or presentations should be made at key meetings with the Coordination, the STVB, the SSC or with the facilities access providers, to agree on the improvements which could be introduced.

6. Reference documents

- ENVRIplus [Deliverable 11.4](#)
- ATMO-ACCESS [Deliverable 2.1](#)
- ATMO-ACCESS [Milestone MS40](#)
- ATMO-ACCESS [Milestone MS56](#)

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[4] ATMO-ACCESS [Deliverable 2.1](#)

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