

# CaRCC 2023 Annual Retreat Report

The Campus Research Computing Consortium (CaRCC) held its second annual strategy and planning retreat June 13-15 in Chicago (Rosemont), IL and online via Zoom. The retreat included members of the CaRCC steering committee, operational groups, People Network chairs, track coordinators and steering committees, and leaders of CaRCC working and interest groups. Thirty-two people attended in person, with another ten attending virtually. (For complete attendee list, see Appendix A).

With CaRCC Mission and Values statements informing the discussion, goals of the Annual Retreat included:

- Revisit what CaRCC is as an organization in light of recent growth, connecting the CaRCC Mission and Values to its activities
- Recognize current areas of strength and recommend areas for growth or continuity
- Identify opportunities for new strategic activities or growth
- Pinpoint activities or areas that need to improve, change, or cease
- Use each of the above to inform development of a set of recommendations and strategic action items for the coming year

Topics were explored in the form of short updates from each group on major accomplishments and activities from the previous year, followed by a series of strategic brainstorming exercises, with small and large group discussions. The event concluded with a vote to name and prioritize a set of action items for the coming year.

## **Defining CaRCC as an organization**

Attendees held discussions around the topic “What is CaRCC?” and conversely, “What isn’t CaRCC?” General consensus was that CaRCC is a professional support organization, advocacy group, and a community of practice for individuals working in the RCD profession and CaRCC serves to:

- Define RCD as a profession
- Connect RCD professionals with peers
- Identify common challenges and trends in the RCD community
- Provide a space for the RCD community to collaborate on meeting and mitigating these shared challenges

Attendees generally agreed that CaRCC is not/should not be a provider of professional certifications, exclusive or expensive to join, nor an organization of institutional members.

### **Current areas of strength**

Current areas of strength for CaRCC, as identified by meeting participants included:

- Successful and ongoing growth of an inclusive, actively engaged RCD community. The CaRCC People Network continues to grow rapidly.
- Professional development opportunities and resource offerings for RCD people
- Advocating for the RCD profession

### **Opportunities for growth and improvement**

Areas for growth and improvement discussed at the meeting included:

- Adoption and use of the new Constituent Relationship Management tool, Wild Apricot to consolidate and manage the large and complex set of CaRCC lists in order to better understand our members' interests and engagement, provide more targeted communications, and more effectively recruit volunteers
- Marketing and outreach efforts to increase CaRCC membership and engagement to a larger and more diverse RCD audience, with a focus on bringing in members from underserved institutions and communities
- Improving collection and use of metrics to inform decision making
- Providing increased support for RCD professionals working in project management-related roles
- Providing more consulting and professional development services to each other within the RCD community. CaRCC has a unique capability to provide these services.

### **Areas for consolidation or elimination**

Although no specific areas were marked for elimination, there was a general consensus that some redundancy may exist across CaRCC groups and activities. It was suggested that groups be evaluated for possible consolidation or increased collaboration in order to reduce the likelihood for duplication of efforts.

## **Funding and sustainability**

There was nearly unanimous agreement among Retreat attendees that funding and sustainability is a current and ongoing challenge for CaRCC. The RCD Nexus Center of Excellence Pilot award from the National Science Foundation currently supports a set of important resources, outreach, and administrative/communications functions including the RCD Capabilities Model effort, Professional Staffing survey, HR Job Family Framework, Career Arcs exploration, and leading practices curation. Central CaRCC administrative functions include communications and event support, website maintenance and support, and list and CRM management through the RCD Nexus award. This award is slated to end April 30, 2024.

Talks began with the NSF in early 2023 about the possibility of a full Center of Excellence award and remain ongoing. Without continued NSF support, many activities and all CaRCC central support will cease at the end of the year. Annual Retreat attendees discussed the need to develop a budget with projected needs to sustain CaRCC activities in the coming years and to develop a sustainability plan that includes grant acquisition as well as the possible creation of a paid individual membership model, and corporate sponsorship opportunities.

## **Priorities and recommendations**

Retreat attendees concluded by voting on a set of top priorities for CaRCC in the coming year.

1. Revisit and update CaRCC vision and mission statements and conduct a formal branding exercise
2. Identify duplication of efforts across CaRCC and develop a plan for consolidation or cross-collaboration
3. Deploy the Wild Apricot CRM to improve metrics and data collection, and develop more targeted communications and marketing efforts
4. Survey the CaRCC community about member priorities and needs
5. Develop and present a draft budget with proposed funding streams, (including a proposed membership/sponsorship model) to CaRCC chairs and advisory committees

## **Next steps and action items**

Next steps and action items are organized around the priorities and recommendations above.

1. In October 2023, CaRCC will hold a special leadership session for all interested and available leadership team members to conduct a formal branding exercise. This activity will be organized and led by CaRCC Communications Lead, Daphne McCanse.
2. CaRCC will form a group to review current activities across the organization and recommend action on reducing redundancy and improving communication between working groups and committees. We will send a call for volunteers to lead and conduct this effort.
3. Deployment of Wild Apricot is in progress, with full adoption slated in September 2023. Tim Middelkoop is leading the technical implementation and Daphne McCanse is coordinating the communications effort around and with Wild Apricot. A new external CaRCC newsletter is planned to launch in October using Wild Apricot as the distribution platform.
4. CaRCC will develop and conduct a survey of CaRCC members in Q4 of 2023 to inform future strategic direction. A small committee will be formed to develop this survey and we will send a call for volunteers to complete this task.
5. A CaRCC committee will be formed to create a budget estimating the total cost of maintaining central administration and activities for CaRCC and making recommendations for covering these costs in the form of grants, and/or paid memberships and sponsorships. We will send a call for volunteers to lead and complete this effort.

## Appendix A

### 2023 CaRCC Annual Retreat List of Attendees

**Amit Amritkar** – Technical Director, Penn State University

**Kirk M. Anne** – Director of Research Computing, Rochester Institute of Technology

**Dana Brunson** – Executive Director for Research Engagement, Internet2

**Cyd Burrows-Schilling** – Research Facilitator, University of California, San Diego

**Sarvani Chadalapaka** – Director of Cyberinfrastructure and Research Technologies, University of California Merced

**Thomas Cheatham** – Professor, Director of Research Computing, University of Utah

**Jason Christopher** – Architect and Cybersecurity Lead, University of California, Berkeley Research IT

**Sean Cleveland** – Associate Director of Cyberinfrastructure, University of Hawai'i

**Jane Combs** – Director, University of Cincinnati Advanced Research Computing Center

**Melissa Cragin** – Associate Vice President for Research Computing, Rice University

**Joel Cutcher-Gershenfeld** – Professor, Brandeis University

**Bob Freeman** – Director, Research Technology Operations, Harvard Business School

**Forough Ghahramani** – Assistant Vice President for Research and Innovation, NJEdge

**John Goodhue** – Executive Director, Massachusetts Green High Performance Computing Center  
**Brian Haymore** – Senior Information Technology Architect, High Performance Computing, University of Utah  
**John Hicks** – Research Engagement Engineer, Internet2  
**Betsy Hillery** – Director, High Performance Computing, Purdue University Rosen Center for Advanced Computing  
**Daniel Howard** – High Performance Computing Consultant, National Center for Atmospheric Research  
**Susan Ivey** – Director, Research Facilitation Service, North Carolina State University  
**Gwen Jacobs** – Director of Cyberinfrastructure, University of Hawai'i  
**Kerk Kee** – Associate Professor, Texas Tech University  
**Rich Knepper** – Director, Cornell University Center for Advanced Computing  
**Julie Ma** – Program Director, Massachusetts Green High Performance Computing Center  
**Tobin Magle** – Lead Data Management Specialist, Northwestern University  
**Ruth Marins Shaw** – Chief Technology Officer, Research Computing, Stanford University  
**Deb McCaffrey** – Cyberinfrastructure Facilitator, Arizona State University  
**Daphne McCanse** – Communications and Engagement Lead, CaRCC/RCD Nexus  
**Susan Mehringer** – Research Scientist II and Research Computing Facilitator, Cornell University Center for Advanced Computing  
**Timothy Middelkoop** – Senior Research Engagement Engineer, Internet2  
**Jackie Milhans** – Director, Research Computing and Data, Northwestern University  
**Claire Mizumoto** – Director, Research IT Services, University of California, San Diego  
**Henry Neeman** – Executive Director of Research Computing, University of Oklahoma  
**Amy Neeser** – Consulting and Outreach Lead, University of California, Berkeley Research IT  
**Anita Orendt** – Staff Scientist, University of Utah Center for High Performance Computing  
**Sam Porter** – Associate Director of Research Computing, University of Maryland Division of Information Technology  
**Ronald Rahaman** – Research Software Engineer, Georgia Institute of Technology  
**Patrick Schmitz** – Principal Consultant, Semper Cogito Consulting  
**Ashley Stauffer** – Analyst, Penn State University  
**John Towns** – Executive Associate Director, National Center for Supercomputing Applications, University of Illinois  
**Michael Weiner** – Research Scientist II and Research Computing Facilitator, Georgia Institute of Technology  
**Jason Wells** – Research Computing Architect and Data Management Lead, Harvard University School of Engineering and Applied Sciences  
**Scott Yockel** – University Research Computing Officer, Harvard University