STScI | SPACE TELESCOPE SCIENCE INSTITUTE

EXPANDING THE FRONTIERS OF SPACE ASTRONOMY

HST Cycle 32 Discussion Panelist Orientation

https://hst-docs.stsci.edu/hsp/hubble-space-telescope-science-policies-group-and-peer-review-information

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on behalf of the STScI Hubble Science Policies Group

April 10, 2024

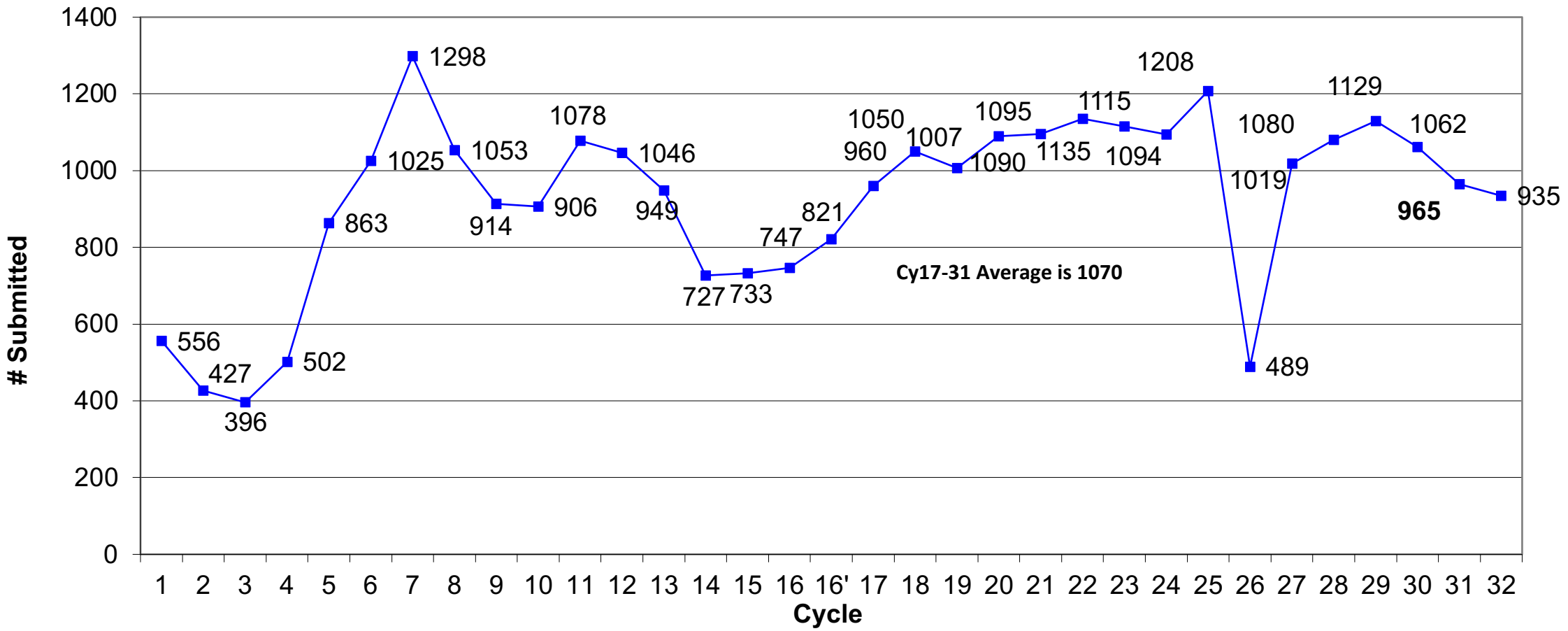
Today's Orientation

1. Welcome from the STScI Director, Jennifer Lotz
2. Welcome from the Cycle 32 TAC Chair, Margaret Hanson
3. Time Allocation Committee Orientation
   - Overview
   - What happens before the panels meet
     - Includes overview on the Dual Anonymous Peer Review by Laura Watkins (Hubble Science Policies Group)
   - What happens during the panel meetings
     - This will be brief today, as we will have another brief orientation and Q&A on this shortly before the panels meet.
   - Policy Issues
   - Personnel and Logistics
4. Hubble Observatory and Instrument performance update from John MacKenty (HST Mission Office)

Your participation is crucial to maximizing the science from Hubble

- The Hubble Cycle 32 TAC review is supported by almost 500 reviewers, including **120 discussion panelists** (you!), 215 external panelists, and 150 expert reviewers.
- This is a *community* process: you have 935 proposals to review, from 3585 unique investigators.
- Getting your grades in on time and writing thoughtful reviews doesn't just help the STScI staff—it helps your fellow panelists and the proposers.

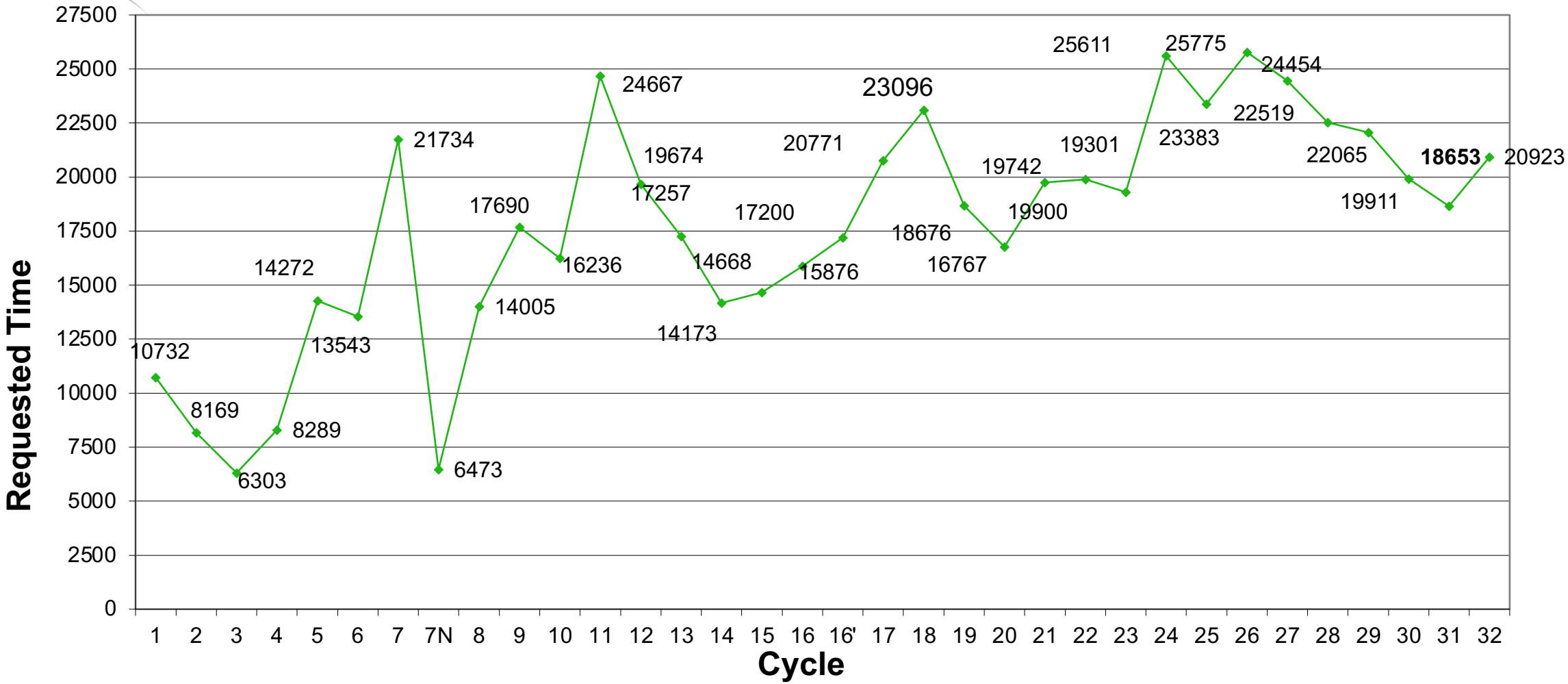
Cycle 32 Proposal Submissions



Thirty-four years after launch, Hubble remains in high demand!

Statistics provided by Alex Hamanowicz

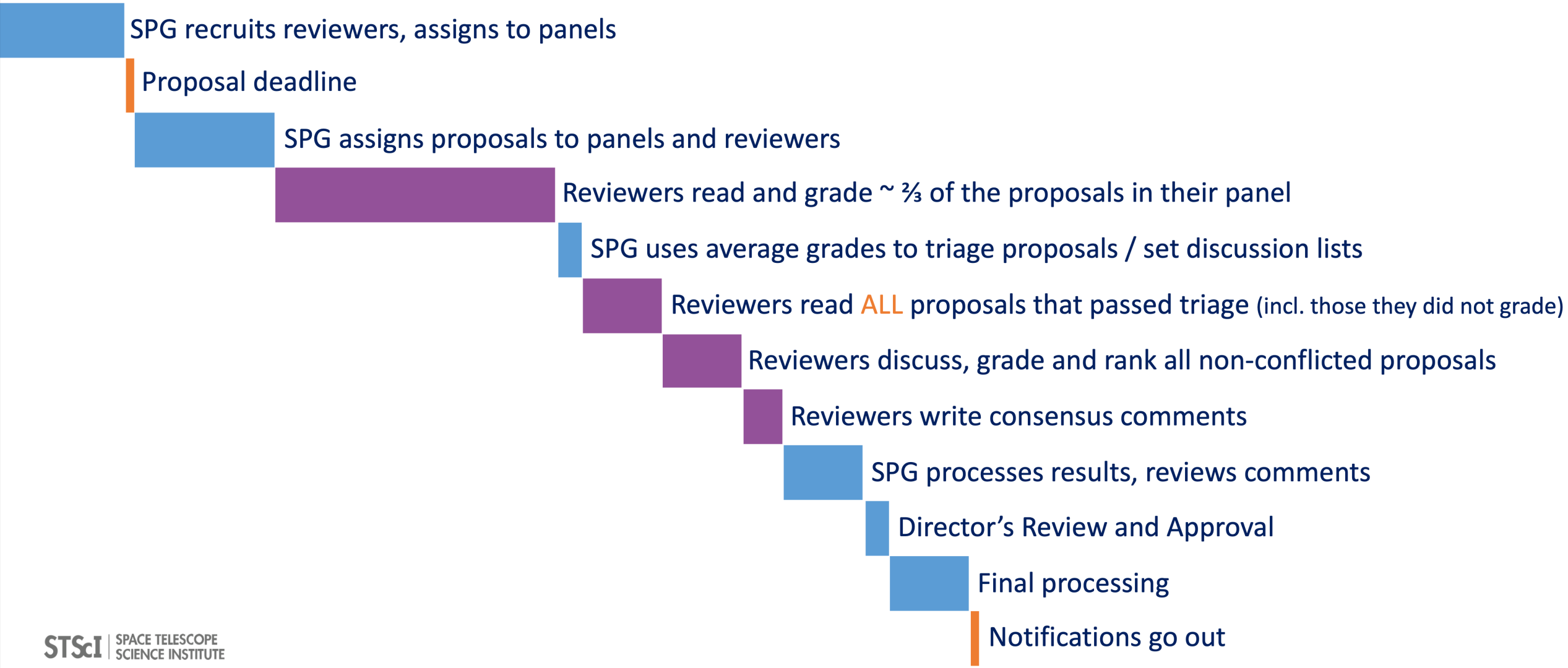
Cycle 32 Orbit Requests



Backup slides include more detailed submission statistics

Statistics provided by Alex Hamanowicz

Overview of the Review Process



Overview of the Review Process

Cycle 32 Proposal Review Schedule

Date	Milestone
Tuesday March 26, 2024	Cycle 32 Proposal Deadline
Wednesday April 10, 2024	Orientation meeting for Discussion panelists
Thursday April 11, 2024	STScI releases proposals to panelists for review
Thursday April 18, 2024	Deadline to **check for and report** additional conflicts of interest
Tuesday May 14, 2024	Deadline for Discussion panelists to submit preliminary grades for their assigned proposals
Wednesday May 15, 2024	STScI sends each Discussion panelist the list of proposals to be discussed by their panel
Tuesday-Friday May 28 – 31, 2024	Virtual panels meet
Monday-Wednesday June 3 – 5, 2024	Executive Committee meets
Monday June 3, 2024	Deadline for Discussion panel review comments
Mid June, 2024	STScI releases the Cycle 32 Science Program

Heads Up! Power outage

- STScI will send out the proposals tomorrow Thursday April 11.
- From noon Friday April 12 to noon Sunday April 14, STScI will have a planned power outage. No computing infrastructure will be available. During this time, this means:
  - You will not be able to access the Spirit review tool.
  - The online documentation on HDox will not be available.
  - STScI staff will not be able to access emails (so will not see or be able to respond to any emails you send).
- We will check in with you when the power is up next week and respond to any emails then.

Overview

Useful Definitions

- **Discussion panels/panelists:** nine panels meeting virtually, and **discussing**, **grading**, **ranking**, and **providing written feedback on** proposals in their respective science categories. Pre-pandemic, these panels physically met at STScI.
- **External panels/panelists:** seven panels (none for Solar System or Transients) **grading** and **providing written feedback on** a subset of small, archival, and snapshot proposals. Their grades are used by STScI to generate a rank-ordered list of proposals in each science category.
- **Expert reviewers:** experts who provide **written input** for the largest proposals but are not members of the TAC.
- **Executive Committee:** the panel **discussing**, **grading**, **ranking**, and **providing written feedback on** the largest proposals, composed of the TAC Chair, Panel Chairs and Vice-Chairs, and At-Large Members.
- **Telescope Allocation Committee (TAC):** the body of all members of the Executive Committee and the Virtual and External panels.

Telescope Allocation Committee (TAC) Organization

- Overall TAC Chair: Margaret Hanson (University of Cincinnati)
- Since Cycle 28, we have followed a hybrid approach, with each of nine scientific categories having a corresponding topical panel divided into external panels and discussion panels. In addition to reviewing proposals, the virtual panels advise the Panel Chair and Vice-Chair on Large, Treasury, and AR Legacy proposals for review by the Executive Committee.
- The Executive Committee, led by the TAC Chair, is comprised of the At-Large members (2), the Panel Chairs (9), and the Panel Vice-Chairs (6). The Executive Committee reviews the Large, Treasury (including Multi-Cycle Treasury (MCT)), and AR Legacy programs and reviews the overall programmatic balance.

Discussion versus External Panels

Hybrid approach: dividing proposals between external review and discussion review.

External panels provide the assessment and grading of a subset of Small GO proposals (1 – 15 orbits, “Very Small”) including Snapshot (SNAP) and Archival (AR) proposals.

- **These proposals are ranked by STScI using the grades of the external panelists.**

Discussion panels review the remaining Small GO and Medium proposals. After the initial triage, panelists interact **virtually** by video-conference to finalize their rankings.

- These proposals are ranked after the discussion and grading in the group panels.

Exceptions – all Small/Medium Target of Opportunity (ToO) proposals will be reviewed by the Discussion panels. Due to proposal load, Solar System and Transients have no External panel. IGM-CGM, LSS and SMBH External panels discuss only ARs and SNAPs.

You are a Discussion panelist.

Panels and Associated Science Categories

Topical panels have these science categories:

- Solar System: all bodies in our solar system (*discussion panel only*)
- Exoplanets and Planet Formation: exoplanets, planet formation, debris disks
- Stellar Physics: cool + hot stars, late stages, low-mass stars, star formation, supernovae
- Transients (new!): all Target of Opportunity (ToO) proposals related to Galactic or Extragalactic high-energy transient phenomena (follow-up of classical novae, supernovae, kilo-novae, tidal disruption events, GRBs, FRBs, etc.) *(discussion panel only)*
- Stellar Populations: resolved stellar populations in galaxies, Milky Way structure, star clusters, ISM in Local Group galaxies
- Galaxies: stellar content of galaxies, ISM in other galaxies, dynamics, galaxy evolution
- Circum- and Intergalactic Medium: CGM, IGM, galaxy outflows, galaxy halos, IGM, quasar absorption lines
- Supermassive Black Holes: AGN, quasars, SMBH, jets, galaxy/BH co-evolution
- Large-scale Structure: cosmology, lensing, galaxy clusters, surveys, deep fields

Types of Proposals

- Regular General Observer (GO): Regular observing proposals.

- Snapshot (SNAP): Observing proposals of relatively short, easy to schedule observations. Usually surveys requesting a list of targets, of which only ~1/3 can be expected to be observed; proposal should explain how success will be achieved with a subset of proposed targets observed. Target list likely to be "generic". Used to increase the observing efficiency of the observatory.

- Archival (AR): Archival research proposals; US PI's and co-I's can request funding. Data-based AR proposals must be primarily based on Hubble data. *All* archival proposals are externally reviewed (except "Legacy" AR proposals, which generally require more resources; Solar System AR are in the virtual panel).
  - Theory proposals: results should enhance the value of HST observational programs through their broad interpretation (in the context of new models or theories) or by refining the knowledge needed to interpret specific observational results.

More info: https://hst-docs.stsci.edu/display/HSP/HST+Proposal+Categories

Special Categories of Proposals

- Joint Proposals: programs in which HST science is the prime science, but multi-wavelength observations from another ancillary observatory (JWST, Chandra, XMM-Newton, TESS, NOIRLab, NRAO) are critical for the science goals of the proposal.
- Calibration Proposals: not linked explicitly to a specific science program; provide a calibration or calibration software that can be used by the community for existing or future programs. Can be GO or Archival.
- Long-term: Proposals requesting time for both this cycle and in the future (up through Cycle 33). These future observations will still require resources to execute and analyze, and thus must be fully justified scientifically.
- Archival Cloud Computing: Proposals requesting funding to use Amazon Web Services (AWS) for data analysis, as all non-exclusive access data for current Hubble instruments (ACS, COS, STIS, WFC3, FGS) are now available via AWS.
- Archival Data Science Software: Proposals requesting financial support for the development of software products that will be made available to the community for the purposes of analyzing HST data.

More at: https://hst-docs.stsci.edu/display/HSP/HST+Proposal+Categories

Special Categories of Proposals

- GO-Archival Proposals: GO programs that include a **significant** archival component. Low levels of archival work are not required to set this flag. These proposals should also provide an analysis plan for the archival work.

- This flag was new last cycle, so implementation may still be inconsistent. In particular, you may see very different levels of archival work in programs with this flag set. We will be lenient about the lack of analysis plan this cycle, as long as the archival work is well-justified elsewhere in the proposal, but a missing analysis plan should be noted.

- It is helpful if you can flag any concerns with these programs so we can improve our documentation for the future!

Special Categories of Observations

- Parallel Observations: Since Hubble's instruments are located at different positions in the focal plane, it is possible to observe simultaneously with one or more instruments in addition to the primary instrument. While these observations do not count toward a panel's orbit allocation, they do require resources for both STScI support, and US investigators can request funding for their analysis. Thus any parallel observations must be well-justified and approved by the TAC.
  - "Coordinated Parallel": Parallel observations part of the same program as the primary observations; may have different science goals. Must be fully described and justified scientifically; can be rejected even if the primary observations are approved.
  - "Pure Parallel": Proposed independently of the primary observations. Reviewed by the Executive Committee regardless of size.

More at: https://hst-docs.stsci.edu/display/HSP/HST+Observation+Types

Special Categories of Observations

In general, if it looks like a proposal is requesting something special (e.g., being in the “continuous viewing zone”), check that they list this requirement in the “Special Requirements”. Likewise, if something is specified in the Special Requirements, consider whether or not it is scientifically justified in the proposal.

All “Special Requirements” must be mentioned in the Phase I proposal in order to be implemented, so it is up to you to verify these requirements are required scientifically.

When it doubt, check out the Call for Proposals: https://hst-docs.stsci.edu/hsp/hubble-space-telescope-call-for-proposals-for-cycle-32

The Review Process: before the panels meet

Discussion Panel Reviews of Small and Medium Proposals

Step 1: Preliminary grading

- Each proposal has 6 reviewers, including 1 primary & 1 secondary. The primary and secondary will be expected to lead the discussion of these proposals, so for these, be sure to include in your notes a summary of what the proposal is about, not just its strengths and weaknesses.
- Each reviewer assigns grades for (1) Impact within the sub-field, (2) Out-of-field impact, and (3) Suitability of Hubble.
- You *must* grade all proposals to which you are assigned, even if you are not the primary or secondary reviewer.
- The number of assignments depends on the panel/proposal load but typically:
  - Primary/Secondary: 5-10 proposals
  - Grading: 25-40 proposals

General Guidelines

- Access proposals at https://spirit.stsci.edu/. All grades and comments will be entered through this portal.
  See https://hst-docs.stsci.edu/display/HSP/SPIRIT+WebReviewer+Tool+Guide (and your email) for full instructions.
- Anticipate how much time it will take to review proposals. Including writing comments, it may take 30–45 minutes per proposal. There are more than 4 weeks between now and the deadline (Tuesday, May 14, 2024). Plan accordingly and budget your time; doing a few proposals a day is a *lot* less stressful than saving them all for the last minute—and leads to better reviews and comments for the proposers.
- You may want to start by reading all of the abstracts for your assigned proposals, instead of digging straight into individual proposals. This will help you get an overview of the task, and it is good for finding conflicts of interest early (e.g., competing proposals or unidentified close collaborators), which helps everyone.
- Take notes. It may be a while between reading a proposal in detail and discussing it on the panel, and your notes will help both you and the other panelists.

Selection Criteria

- Impact within the sub-field: The scientific merit of the program and its contribution to advancement of knowledge.
  - The immediate sub-field of the proposal is the niche area of the program, not the whole broad science area of the topical panel to which it was assigned.
- Out-of-field impact: The program's impact for astronomy in general. Are there implications for other science areas and/or insights into larger-scale questions?
  - The proposal does not have to impact all of astronomy, but should ideally impact a number of other sub-fields or provide significant impacts in at least one other sub-field.
- Suitability: The necessity for HST observations or relevance to HST science. For observing programs, this means a demonstration that the unique capabilities of HST are required to achieve the science goals; how much of a scientific advantage does HST data offer over other facilities? Consider how well any special requirements have been justified.

The evaluation should be based on what is written in the proposal, not on the reviewer's broader knowledge.

Reviewers must ensure that the comments address some or all of these primary criteria.

https://hst-docs.stsci.edu/display/HSP/Selection+Criteria+and+Scoring+System

We use a “Stellar Magnitude” Scoring System: 1 is BEST

Grade	Impact within the sub-field	Out-of-field impact	Suitability
1	Potential for transformative results	Transformative implications for one or more other sub-fields	Science goals can only be achieved with HST
2	Potential for major advancement	Major implications for one or more other sub-fields	Major advantages in using HST over other facilities
3	Potential for moderate advancement	Some implications for one or more other sub-fields	Some advantages in using HST over other facilities
4	Potential for minor advancement	Minor impacts on other sub-fields	Minor advantages in using HST over other facilities
5	Limited potential for advancing the field	Little or no impact for other sub-fields	HST offers little or no advantage over other facilities or the advantages of using HST are unclear.

Longer descriptions, more details, and examples at:
https://hst-docs.stsci.edu/display/HSP/Selection+Criteria+and+Scoring+System

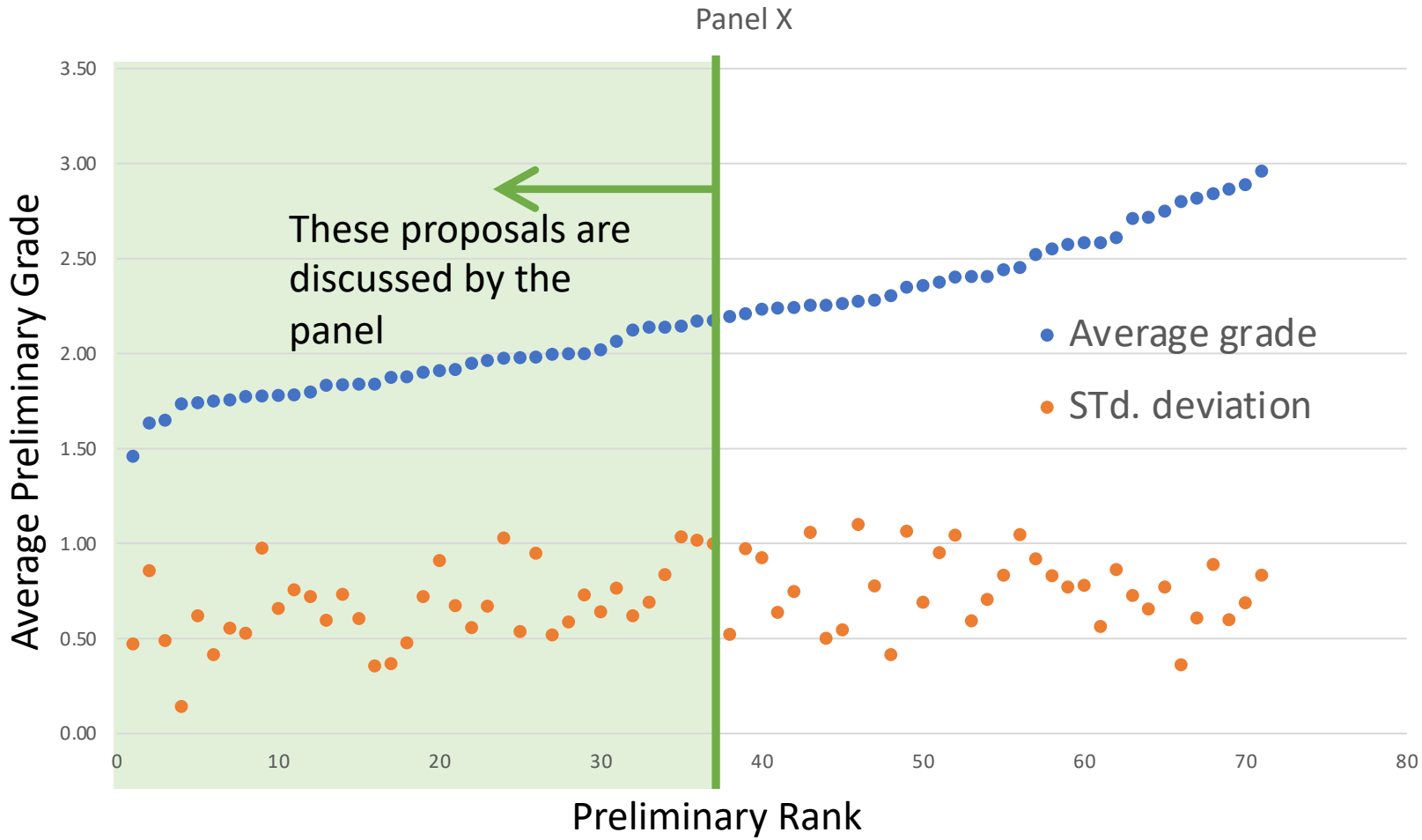
Dual Anonymous Review

- In a Dual Anonymous Review, the identities of the proposal teams have been removed from the proposals prior to the preliminary review.
- During all stages of the panel review process, reviewers grade and rank proposals without knowing the identities of the proposal teams.
- Panelists should flag any proposals they identify as not compliant with the posted Dual Anonymous Review guidelines and bring them to the attention of the Science Policies Group (email your Panel Support Scientist and your Science Policies Group Manager; you were emailed these names previously, and they are at the end of this presentation). SPG will review and then provide guidance for how to proceed.

Step 2: Preliminary ranking

STScI averages grades & advance the higher ranked proposals to the next stage.

- Preliminary grades and specific ranks are not circulated to the panels; proposals to be discussed should be reviewed as a group without bias of prior ranking



Proposals for Review

- Discussion lists will be distributed on Wednesday, May 15, 2024. You will need to review all surviving proposals so you can contribute to the discussion.
- Each non-conflicted panelist may suggest one (1) proposal from the triage for inclusion in the review. A strong justification must be provided. It is *extremely* rare for triaged proposals to be awarded time. If you have one to suggest, tell your Chair ASAP to give your fellow panelists time to review the proposal.
- The process is necessary in order to limit the number of proposals for discussion
  - Spend time discussing the best proposals
  - Avoid discussing proposals that are less likely to be approved
- Get your grades in time so we can distribute these discussion lists as soon as possible, giving everyone more time to read the proposals they did not initially grade.

Dual Anonymous Peer Review (DAPR)

The Review Process: during the panel meetings

The Panel Meetings

The subject panels will meet virtually via Webex Tuesday, May 28 through Friday, May 31.

Plan to be available from 10am to 4pm Eastern Daylight Time each day: That's 7am–1pm on the US west coast, 4am–10am in Hawaii, 3pm–9pm in the British Isles, 4pm–10pm Central European Time, and 5pm–11pm in Israel.

It is important to be present for the discussion of all proposals (unless there is a conflict). Except for unforeseen emergencies, you should not schedule activities unrelated to the review during those times.

The Panel Chair will set the schedule; breaks will be scheduled throughout the day.

Roles and Responsibilities

- Panel Chair, supported by the Vice-Chair runs the meeting
  - Panelists should follow the code of conduct
- Panel Support Scientist (PSS) monitors SPIRIT, produces ranked lists, answers questions, or summons STScI staff experts, as needed. They have the authority to stop the discussion if the discussion strays away from proposal criteria strengths and weaknesses.
- Space Telescope Science Institute (STScI) staff
  - Science Policy Group (SPG) answers questions on policy issues
  - Instruments Division (INS) answers technical questions on instrument capabilities and performance
  - Scheduling Group answers questions on the execution of observing programs
- Observers

  Representatives from NASA Headquarters, the HST Project at Goddard Space Flight Center, ESA, the STScI Director and Deputy Director, STScI ESA Office, STScI HST Mission Office

Tools for a virtual meeting

- In the next week, you will be invited to the Hubble TAC Slack Team. Please accept and join! Your panel will have its own channel. The desktop app is vastly superior to using it in a browser window.
- Once it is open, Slack will be the easiest way to get in touch with STScI staff, your Panel Chair, and the other Panelists.
- Each panel will have its own channel in Webex. Connection information will both be emailed to you and posted to Slack.
  - Your PSS will organize a Webex check for your Panel in advance of the meeting. *Please* join if you can, even if you have used Webex before. Also, a chance to say hi!
  - There exists a Webex app for phones and tablets, and international call-in numbers in case of loss of connectivity. Best to be prepared…
- Do not discuss individual proposals within the panel channels in Slack.
- Read through https://hst-docs.stsci.edu/display/HSP/Webex+and+Slack+Guidelines in advance of the meeting

The Panel Meeting -- Overview

1. Panels discuss and re-grade each proposal.
2. Once the grading is complete, the ranked list is compiled.
3. Panels can re-rank proposals within this list to allow for science balance, etc.
4. Once the ranking is complete, panelists can review the Team Expertise for the top proposals.
5. Panelists provide written consensus reports for *every* proposal.
6. Panelists comment on a subset of the Executive Committee (Large, Treasury, AR Legacy) proposals to assist the Chair and Vice Chair in their reviews.

Detailed Proposal Discussion Procedures

1. Panelists with conflicts disconnect from the virtual meeting room or are moved to a separate “breakout room”. This includes STScI staff and Observers.
2. The Chairs and Vice-Chairs manage the process and may participate in the discussion, but do not grade.
3. The primary reviewer summarizes and reviews proposal. The secondary reviewer adds supplementary comments.
4. The panelists discuss the proposal, ***without comparisons to any other proposals***.
5. The discussion should include the resource allocation: primary orbits, coordinated or pure parallel, exclusive access period, duplication justification, special requirements.
6. The panel submits final grades on the proposal via SPIRIT. Everyone not conflicted except the panel chair and vice chair must grade--NO abstentions!!
7. The primary reviewer is responsible for collating all relevant comments, and recording those comments in SPIRIT.

Proposal Ranking: Procedures

1. Each panel has an allocation of *N* orbits for Small proposals and *M* orbits for Medium proposals.
   - All proposals must be graded and ranked on the same scale.
   - Calibration proposals are drawn from a separate pool of orbits and do not count against the panel's orbit allocation
   - If your panel has Archival or Snapshot proposals, they do not count toward the orbit allocation. (There is a total Snapshot orbit total across all panels.)
2. Once all proposals have been graded, the Panel Support Scientist (PSS) generates an initial ranked list.
3. The panel then discusses and agrees on **a final ranked list of programs** that encompasses at least 2×*N* orbits.
   - Any changes to the initial ranked list must be done by sequential pairwise comparisons and changes, being mindful of any conflicts of interest
   - Some panels don't change their initial ranked list at all; others make many many changes.

Medium Proposals

- Medium proposals are reviewed solely in their assigned panel.
- Each panel grades and ranks the Medium proposals together with all other proposals.
- Medium proposals may be recommended for acceptance if they are above the 1*N* line. Panels should not artificially move a Medium proposal above the line.
- Each panel is allocated *M* orbits for Medium proposals based on the relative orbit pressure among the Medium proposals across all panels.
- Medium proposals above the 1*N* line have no orbit charge until the Medium orbit allocation *M* is reached going from the highest to the lowest ranked Medium proposal above the 1*N* line.
- Thereafter, Medium orbits of additional Medium proposals above the 1*N* line **must** come out of the Small orbit pool.
- If the Medium proposals above the 1*N* line do not fully use the Medium orbit allocation, those Medium orbits will be returned to the communal pool; the panel **cannot** allocate them to Small programs.
- A summary of the recommended Medium proposals will be provided by the Chairs at the beginning of the Executive Committee meeting.

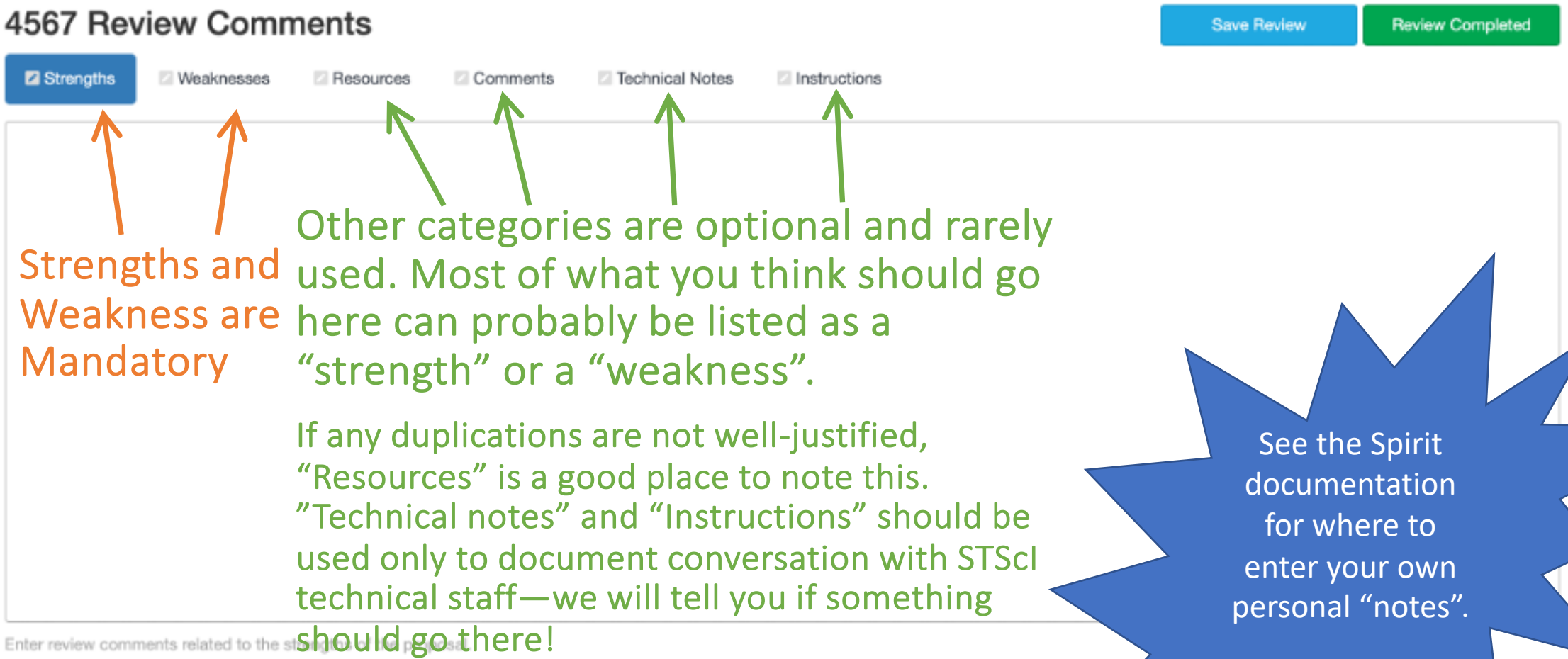
Proposal De-anonymization and Team Expertise Review

- After the ranking has been finalized and is frozen, the proposals above the 1*N* line are de-anonymized and panels will review the Team Expertise description for each recommended proposal.
- If necessary, the panel may express concerns about insufficient expertise, which will be recorded and communicated with the Director.
- Any concerns will not change the ranking of the proposals in the panel but may affect the Director's decision to accept a particular proposal.
- Even if no concerns are raised, this process is in place to alleviate community anxieties about the dual anonymous review process.

Proposal Comments

- Comments are required for **all** proposals (including triaged proposals).
- Final comments may be entered after the meeting finishes; expect to spend time after other work has completed working on the comments as a group.
- The deadline for panel members to enter comments is Monday June 3, 2024 and for Chairs to review and approve comments is Friday June 7, 2024.
- Primary reviewer is responsible for writing the comments; add any comments arising from the discussion to produce a final set of comments for each proposal.
- Don't make up reasons for rejection – if a proposal was good, but just didn't quite make the cut, then say so. Be particularly careful near the allocation boundaries. Use *Mandatory* comments only to exclude targets [e.g. duplications] or to reduce observing time allocation. All other comments are *advisory*.
- Do not use any generative AI programs (e.g., ChatGPT) to assist in writing comments.
- BE THOUGHTFUL. People put a lot of effort into writing these proposals, and you have put a lot of effort into reviewing them. Let your comments reflect that effort.

Proposal Comments: Practical Instructions



See the Spirit documentation for where to enter your own personal “notes”.

Proposal Comments: Detailed Instructions

- Proposal feedback comments should be concise.
- Please avoid asking questions in the comments.
- The reports should focus on the scientific content and not the reviewer.
- Comments that may be perceived as derogatory or insulting must be avoided.
- Reviewers cannot be sure at the time of writing feedback comments whether the proposal will be accepted (even if it is “above the line”). The comments should be phrased in such a way that they are sensible and meaningful regardless of the final outcome.
- Reviewers should avoid statements that create the impression that the low ranking of a proposal is due to a minor mistake. Many proposals do not have obvious weaknesses but are just less compelling than others: in such a case, acknowledge that the considered proposal is good but that there were others that were more compelling.
- Never include in the report an explicit reference to another proposal, such as the proposal ID.
- Whenever possible, make suggestions for possible improvements, but avoid giving the impression that following those suggestions guarantees that the proposal will be more successful in next cycle.
- Please do not use generative language AI (e.g. ChatGPT) to write your comments.

For more information: https://hst-docs.stsci.edu/display/HSP/Proposal+Feedback+Comments

Executive Committee Proposals

Panelists are asked to comment on a subset of the Executive Committee proposals:

- Panel Chairs and Vice Chairs will be reviewing Large, Treasury, and Archival Legacy proposals as part of the Executive Committee. Special for Cycle 32, they will also be reviewing Multi-Cycle Treasury (MCT) programs.
- Some of these proposals will be aligned with your panel; others will be from other fields.
- The Panel Chair and Vice Chair will solicit feedback from the panel on the subset of proposals they have been given to review. This process allows more scope for specialist commentary, informing the Chairs and aiding discussion in the Executive Committee meeting.
- Closer to the review, your panel chair will be in touch with how they plan to solicit feedback. Often, this is a group discussion amongst the panel members. Same rules apply for conflict of interest as with panel proposals.
- All Executive Committee proposals have also been sent to expert reviewers for comments. These comments are made available to all non-conflicted EC members assigned to each proposal, i.e., your input will not be all the panel has to go on.

Policy Issues

Code of Conduct

All participants in the proposal review process are expected to:

- Be mindful of bias in all contexts.
- Be respectful in any written or verbal communications you have as part of the review process.
- Step in to address abusive or bullying behavior.
- Be respectful of all regardless of differences (professional or otherwise).
- Actively help create an environment free of harassment.
- Be an active participant in the discussions, but do not interrupt others or talk over others.
- Keep comments succinct and to the point, thus giving everyone the opportunity to contribute to the discussion.
- Be polite and professional in your written feedback comments, *especially* when providing critical comments.
- Hubble is a shared resource and we receive proposals from all over the world, many from non-native English speakers. The proposal should be understandable, but please take care to judge the science in the proposal, not the quality of the language or the grammar.

Please report any violations of the code of conduct to your SPG manager, your PSS, and/or your Chair.

Conflict of Interest

Our goal is informed, unbiased discussion of each proposal:

- Voting panel members should have neither direct nor indirect interest vested in the outcome of the review
- The subset of the review panel discussing the proposal should have sufficient knowledge to assess the science

Anonymizing proposals simplifies conflicts:

- We only consider personal conflicts
  - Direct involvement in the proposal
  - Involvement of close collaborators/competitors/family members based on names supplied by individual panelists
  - On directly competing proposals
- Institutional conflicts are **not** considered
- Panelists may flag additional conflicts during the meeting
  - Please raise any such concerns with PSS and SPG members
  - Do **not** identify the potential cause to other panelists

Conflict of Interest

If you have not yet identified your conflicts of interest, please do so IMMEDIATELY.

Conflict of Interest: Procedures During Panel Review

- Complete the Conflicts of Interest Disclosure form before reviewing proposals
- Panel Chair (aided by Panel Support Scientist) is responsible for checking conflicts
- Do not try to guess the names of the investigators on the proposal
- In almost all cases, conflicts are already recorded in our database
- Note conflicts before discussing each proposal
- Do **not** state the nature of the conflict (e.g., "*I am a co-I on this proposal*")

Conflicted panelists disconnect from the virtual meeting room (or go into a breakout session) and do not vote. After grading, the PSS will reinvite panelists to return.

If in doubt, ask the Science Policies Group (SPG) for clarification.

General Guidelines

- Panel Members should assume that all instruments will be performing nominally in Cycle 32
- Panel Members should not modify proposals unless there is an **extremely** strong Scientific Justification
- Panel Members should *not* reject or downgrade proposals based on technical considerations without concurrence by STScI
    - STScI will perform a technical review on all accepted proposals and will work with successful PIs to make programs flight ready. If technical questions arise during the panel review, please ask your PSS to summon a relevant expert.
- Panel Members should *not* take scheduling considerations into account in grading proposals, but any scheduling constraints *must* be clearly stated *and* scientifically justified.

Concentrate on recommending the best science… but recognize that it may not be possible to schedule all highly ranked programs

Confidentiality

- Remember that you should not discuss the deliberations or outcomes of the panel evaluations – now, or in the future.
- Do not post comments to Facebook, Twitter, Instagram, TikTok, etc. regarding the content or your participation in the panel meeting.
- Do not use generative language AI (e.g., ChatGPT) for *any* part of the review process.
- Individual reviews should be independent; do not consult with other panelists before the panel convenes.
- As a video-conference panelist, make sure no one with a vested interest can follow the panel discussion. (Headphones are better for audio anyhow!)
- Confidentiality carries from prior years: Do not discuss/compare prior years proposals in this review, even with panel members who also served in prior years.
- Please purge any review files from your computer after the review.
- Panelist names will be shared in the STScI Newsletter after the selections are public; only then should you feel free to update your c.v., etc.

Personnel & Logistics

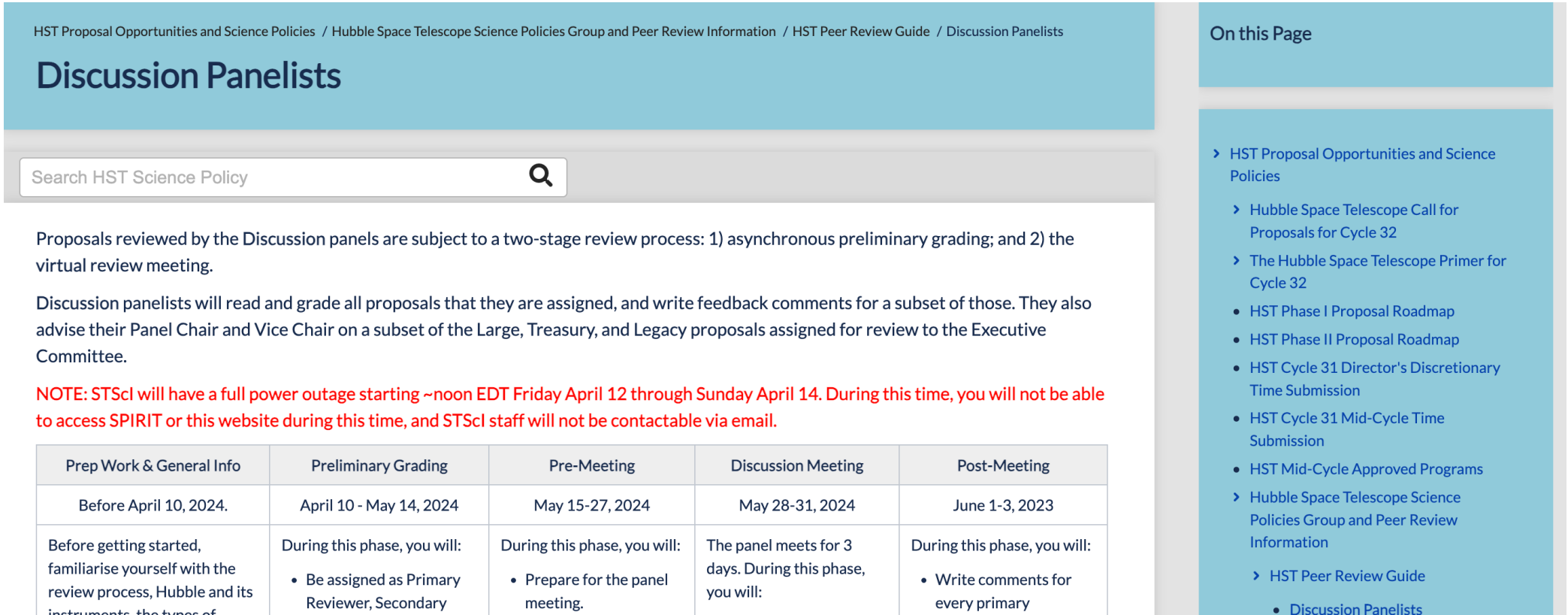
Panel Personnel

Panel	PSS	SPG Manager
Executive Committee	Amber Armstrong	Claus Leitherer
Exoplanets	Shelly Meyett	Amanda Pagul
Galaxies	David Coulter	Matt Siebert
IGM-CGM	Rosa Diaz	Nimish Hathi
Large Scale Structure	Sapna Mishra	Andy Fruchter
SMBH	Tricia Royle	Andy Fruchter
Solar System	Tony Roman	Laura Watkins
Stellar Physics	Eduardo Vitral	Claus Leitherer
Stellar Populations	Adarsh Ranjan	Nimish Hathi
Transients	Calum Hawcroft	Claus Leitherer

You should have received an email with the name of your Chair and Vice-Chair. The TAC chair and two At-Large Members will also be on Slack and in the Webex rooms during the meeting.

Where to Go To for Help

- Call for proposals: https://hst-docs.stsci.edu/hsp/hubble-space-telescope-call-for-proposals-for-cycle-32
- Full online documentation for the review process: https://hst-docs.stsci.edu/hsp/hubble-space-telescope-science-policies-group-and-peer-review-information



HST Proposal Opportunities and Science Policies / Hubble Space Telescope Science Policies Group and Peer Review Information / HST Peer Review Guide / Discussion Panelists

Discussion Panelists

Search HST Science Policy

Proposals reviewed by the Discussion panels are subject to a two-stage review process: 1) asynchronous preliminary grading; and 2) the virtual review meeting.

Discussion panelists will read and grade all proposals that they are assigned, and write feedback comments for a subset of those. They also advise their Panel Chair and Vice Chair on a subset of the Large, Treasury, and Legacy proposals assigned for review to the Executive Committee.

NOTE: STScI will have a full power outage starting ~noon EDT Friday April 12 through Sunday April 14. During this time, you will not be able to access SPIRIT or this website during this time, and STScI staff will not be contactable via email.

Prep Work & General Info	Preliminary Grading	Pre-Meeting	Discussion Meeting	Post-Meeting
Before April 10, 2024.	April 10 - May 14, 2024	May 15-27, 2024	May 28-31, 2024	June 1-3, 2023
Before getting started, familiarise yourself with the review process, Hubble and its	During this phase, you will: • Be assigned as Primary Reviewer, Secondary	During this phase, you will: • Prepare for the panel meeting.	The panel meets for 3 days. During this phase, you will:	During this phase, you will: • Write comments for every primary

On this Page

- HST Proposal Opportunities and Science Policies
  - Hubble Space Telescope Call for Proposals for Cycle 32
  - The Hubble Space Telescope Primer for Cycle 32
  - HST Phase I Proposal Roadmap
  - HST Phase II Proposal Roadmap
  - HST Cycle 31 Director's Discretionary Time Submission
  - HST Cycle 31 Mid-Cycle Time Submission
  - HST Mid-Cycle Approved Programs
  - Hubble Space Telescope Science Policies Group and Peer Review Information
    - HST Peer Review Guide
      - Discussion Panelists

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Who to Go To for Help

- **Questions? When in doubt, email your Panel Support Scientist (PSS)!**
- Potential conflict of interest? Email your PSS.
- Problems accessing Spirit? Email wasabi@stsci.edu and/or Alex Hamanowicz.
- Questions about HST instruments and their capabilities, or technical feasibility of a proposed program? Email your PSS and SPG Manager.
- Have unavoidable scheduling constraints during the virtual meetings? Email your Panel Chair & Vice Chair (sooner obviously better…).
- Want to give an update on your status? Email your PSS and SPG Manager.
- Once you have access to the HST TAC Slack, that is the easiest way to get help.

Other STScI Personnel (some of whom may drop in on your panels)

- Director's Office:
  - **Jennifer Lotz** – Director
  - **Nancy Levenson** – Deputy Director
  - **Neill Reid** – Associate Director for Science
- Science Mission Office:
  - **Marc Postman** – Science Mission Office Head
  - **Laura Watkins** – Science Mission Office Deputy Head
  - **Claus Leitherer** – Hubble Science Policies Lead
  - **Andy Fruchter, Nimish Hathi, Amanda Pagul, Molly Peeples, Matthew Siebert**– Hubble Science Policies Scientists
  - **Alex Hamanowicz** – TAC Technical Manager
  - **Amber Armstrong** – Deputy TAC Technical Manager
- Hubble Mission Office
  - **Tom Brown** – HST Mission Office Head
  - **Helmut Jenkner, Julia Roman-Duval** – HST Mission Office Deputy Heads
  - **Carol Christian, John MacKenty** – HST Mission Office Scientists
- Planning and Scheduling:
  - **Bill Januszewski** – Operations Planning Branch
- Logisitics:
  - **Sherita Hanna, Shemiah Smith, Darlene Spencer** – Events Planning Group Staff
  - **Thomas Marufu** - IT Technologist (in charge of all things A/V, Webex, etc.)

NASA and ESA Personnel (some of whom may drop in on your panels)

- NASA:
  - **Jennifer Wiseman** – Hubble Senior Project Scientist, NASA GSFC
  - **Ken Carpenter** – Hubble Operations Project Scientist, NASA GSFC
  - **Andrew Ptak** – Hubble Deputy Operations Project Scientist, NASA GSFC
  - **Mike Garcia** – Hubble Program Scientist, NASA HQ

- ESA:
  - **Chris Evans –** Head of the ESA Office at STScI and Hubble Project Scientist for ESA, STScI
  - **Paule Sonnentrucker –** ESA Hubble Mission Manager, STScI

After the TAC …

- As always, we welcome feedback on the TAC process
  - How did the grading process work?
  - Can we improve it?
  - What were the main shortcomings?

- We will send email to all Panel members with a survey requesting your views of the process. Please fill it out! Many of the process improvements this year were in a direct response to last year's survey: we value your input!! (You might like to make notes as go through to remind you.)

Thank you!

The Hubble TAC would not be possible without your critical support and contributions!

Back Up

GO Proposals Information (771 proposals for 20,905 orbits)

Type	Proposals	HST Orbits
Small (1–34 orbits)	618	7,581
Mediums (35–74 orbits)	111	5,700
Large (75+ orbits)	42	7,624
Treasury	16	3,776
Pure Parallel	0	0
ESA	200	4,734

Statistics provided by Alex Hamanowicz

Archival Research Requests (131 total)

Archival Research	# of Proposals
Regular	73
Theory	42
AR Legacy	19

Statistics provided by Alex Hamanowicz

Joint Observatory Requests

Observatory	Proposals	Requested Time	HST Orbits
Chandra	15	1066 Ksecs	204
JWST	27	243.57 Hours	654
NOIRLab	17	26.1 Nights	352
NRAO	9	179.92 Hours	155
TESS	1	1 Target	8
XMM	10	861 Ksecs	170

Statistics provided by Alex Hamanowicz

Targets of Opportunity Requests

	Activations
Ultra Disruptive	9
Disruptive	32
Non-Disruptive	30
FlexDay	5

(Some proposals are in multiple categories)

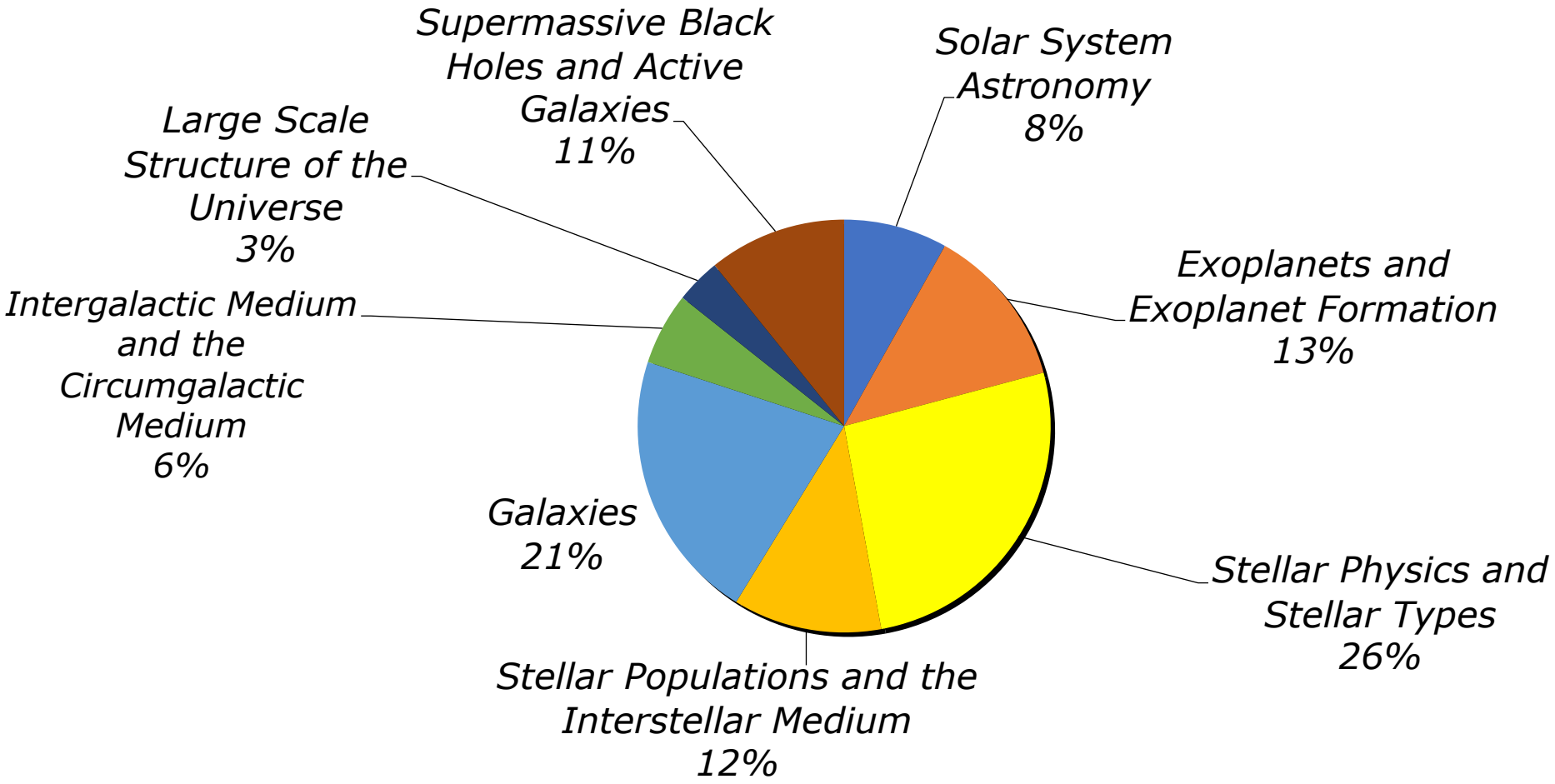
Statistics provided by Alex Hamanowicz

Special Initiatives

Initiative	Proposals	HST Orbits
UV	322 + 35 ARs	11,588
Fundamental Physics	12 + 7 ARs	401 + 248 (Par)
Cloud Computing	2	-
Data Science Software	8	-
Calibration	2	23

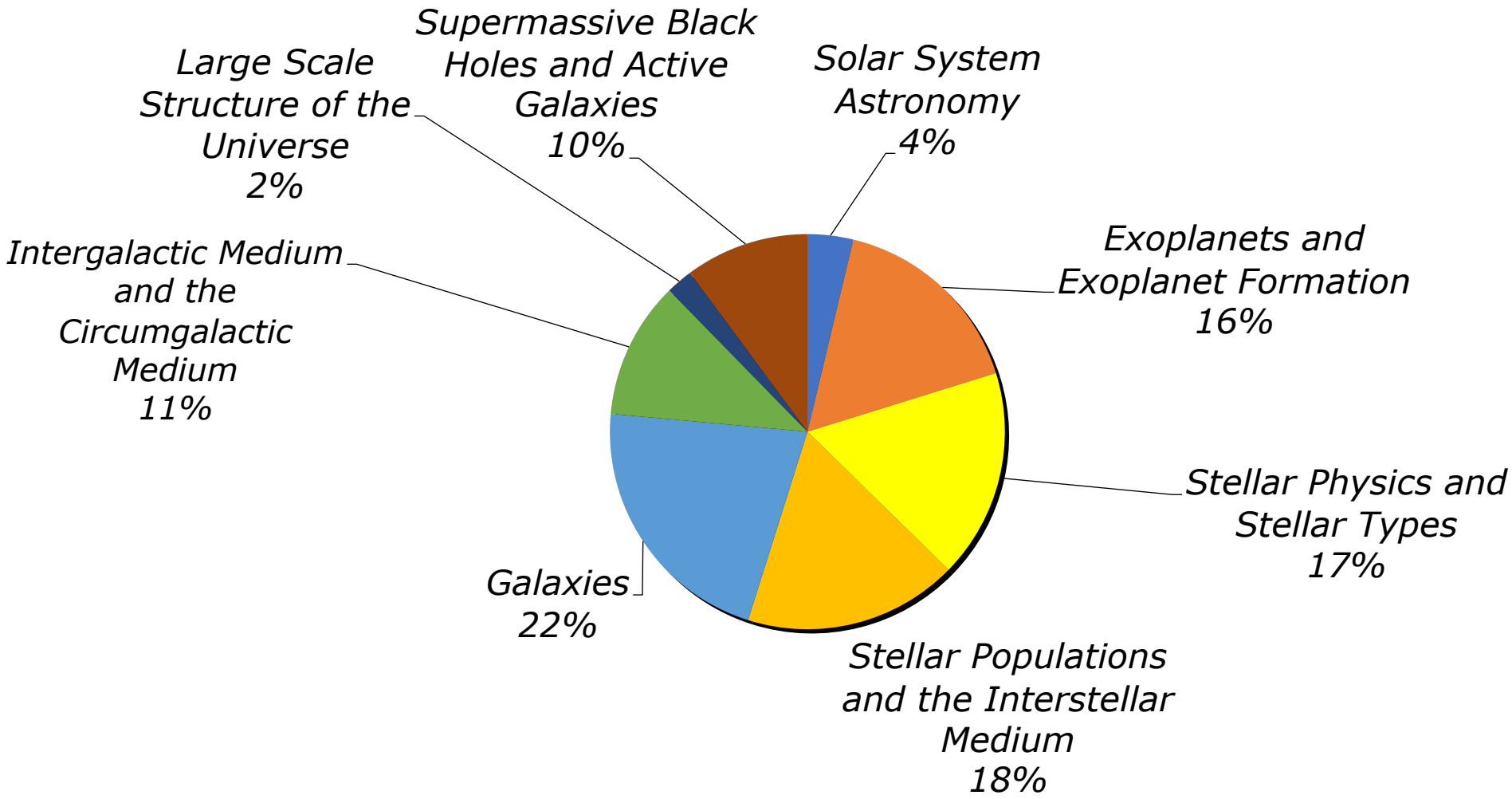
Statistics provided by Alex Hamanowicz

Science Categories for Proposals



Statistics provided by Alex Hamanowicz

Science Categories for Orbits



Statistics provided by Alex Hamanowicz

Close Collaborators

Who qualifies as a close collaborator?

- **Active** collaborator on a current research program (including Cycle 32 HST proposals)
- **Active** co-author on 3 or more papers in last 3 years
  - i.e. more than a participant in a large project (e.g. SDSS)
- **Active** collaborator on several recent programs
  - Pre-pandemic, this was ~3 projects in last ~3 years; adjust accordingly.

Key question: would I or my personal research benefit (or would there be an *appearance* of benefit) if this proposal is accepted?

If the answer is yes, then there is a conflict

Duplication Policy

- To maximize observing efficiency, later-cycle GO programs may not duplicate observations in current or past GO programs; duplicate targets will be disallowed or embargoed unless justified scientifically.
- Duplications are defined as *same target or field, same instrument and mode, similar spectral range, similar exposure time.*
- ***Consult SPG staff if in doubt***.
- The PI is responsible for noting duplications. Panels should approve duplications explicitly (in comments) or observations can be disallowed.
- Same-cycle duplications: avoid duplicate targets within and between panels. No “forced collaborations’’ allowed.
- STScI will check accepted proposals for duplications.

HST TAC Summary and Agenda

- **Virtual panels** grade proposals between now and May 14.
- **Virtual panels** meet Tuesday, May 28 – Friday, May 31 between 10a and 4p EDT, with appropriate breaks inserted. Minor adjustments to accommodate time zone differences can be considered.
- Virtual panels rank
  - Small GO proposals requesting 16 – 34 orbits (IGM/CGM, LSS, SMBH, Solar System, and Transients rank **all** Small proposals)
  - All Target of Opportunity proposals requesting 1 – 74 orbits (most of these go to Transients)
  - Medium GO proposals requesting 35 – 74 orbits
- Panel members advise the Panel Chair and Vice-Chair on Large, Treasury (incl MCT), and Archival Legacy proposals.
- The **Executive Committee** meets in person Monday, June 3 – Wednesday, June 5.
- Executive Committee reviews
  - Large GO proposals (> 74 orbits)
  - Pure Parallel Proposals
  - Treasury Proposals
  - Archival Legacy Proposals
  - SNAP proposals requesting > 250 targets