

# Compass Methodology and Tutorial

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## Methodology

### Introduction

The G-FINDER survey, and almost all the data presented in our reports and the G-FINDER data portal, is a retrospective look at what happened to neglected disease R&D funding in the most recent year the survey was held. A delay in releasing this data allows us to wait patiently for all the data to arrive and gives us the time to be scrupulously accurate – cross checking funder and recipient reporting of tens of thousands of grants and painstakingly analysing them to determine whether they genuinely meet our scoping criteria around LMIC needs. This is the most accurate summary of global R&D funding it is possible to provide; but, by nature, it is out-of-date. We are attempting to make this delay more bearable by providing earlier access to funding announcements and modelled projections for major funders in something closer to real time. This builds on the work we did tracking funding announcements in the early months of the COVID pandemic; and that experience provides some insights about how to – and how not to – use the preliminary data we are providing.

Tracking COVID funding as it was announced throughout 2020 gave us a preliminary total of \$9.1bn. A more sober retrospective analysis gave a total of just over half that amount - \$4.7bn. Some of this gap reflects the wider reach offered by announcement tracking over asking funders to respond to a lengthy survey – we know we missed some genuine funding which showed up in our announcement data. But much of it also represents the ease of announcing new funding compared to delivering it. The final reason for the difference is that a ten-year commitment to provide \$300m isn't really a \$300m funding commitment, since inflation will erode its value and changing circumstances may render it irrelevant long before the end of the grant period.

Each of these issues is relevant to interpreting Compass data. Announcements may not be entirely new money, or may come with strings attached; projections based on modelled data may not hold up to changes in circumstance; and the headline value of announcements don't take into account the effects of inflation on long term grants. Nevertheless, we hope Compass data provides a valuable supplement to the less timely, but more accurate analysis provided by the G-FINDER data.

### Scope

The scope of Compass data matches the [neglected disease scope](#) of the G-FINDER project. Compass excludes funding specifically earmarked for emerging infectious diseases and sexual & reproductive health issues. Unlike in the G-FINDER process, Compass data is only assessed for its scope (in/out of scope) and allocation to disease and product once, and is not subjected to our standard – more thorough – review process.



## Data downloads

It is not possible to download the data behind a specific visualisation on the Compass dashboard. However, we have provided a downloadable dataset for each of the available datasets: Total ND funding, Philanthropic funding, and Funding to PDPs. These can be found at the top of each page.

The downloadable datasets include several additional fields that may assist in interpreting the data, such as specific assumptions and the date the data was last refreshed. Please note that the date of last refresh may only refer to the inclusion of new grants, not a review of grants that were already included in Compass.

## Historical disbursements

Historical disbursements encompass the 'traditional' G-FINDER data based on our annual survey, captured in dark purple in our visualisations. This data has been extensively checked and verified and as such differs from the calculated funding. Both Compass and Other Historical funding represents our highest confidence in data accuracy. As data is collected and more thoroughly checked during the G-FINDER process, grants that were previously marked as Compass funding may be reclassified as Historical disbursements. Please see the [G-FINDER data portal methodology](#) for more information.

## Compass funding

We define Compass funding as funding that we have historically captured in the G-FINDER survey up to and including FY2022, and where public systems allow us to make predictions about future (post-FY2022) funding. These public systems vary from press releases to searchable databases and are detailed per funding organisation later in this document. Our visualisations show both the historical (dark orange) and the calculated (light orange) values of Compass data.

## Calculated Compass funding

Calculated funding includes funding of projects where we have a start and end date, as well as project total values, which are prorated on an annual basis on the assumption that equal portions of the grant will be disbursed in each year. If these are continuing grants, they would have gone through our thorough verification process, but many of these grants are new and have been through only one round of scope checking, making their allocations slightly less reliable compared to the 'traditional' G-FINDER data.

We acknowledge that prorating does not match reality; some organisations front-load their funding in the early years of the grant, others will base their funding on an agreed schedule unknown to us, and others may disburse based on milestones reached or recipient-lead requests. Once we have traditional G-FINDER data for these projects, the prorated amount for the current survey year will be replaced with the actual disbursement, and the proration will be re-applied to the rest of the funding over the remaining number of years.



## Data collection and nuances per funder

### Calculated Bill & Melinda Gates Foundation funding

The Bill & Melinda Gates Foundation is a philanthropic organisation, funding both PDPs and other organisations, including industry and academic institutions. Funding is retrieved via the Grants data download on the [Committed Grants](#) page. This data is then searched for relevant grants by searching a preset list of topics and keywords. Relevant grants are prorated equally on either a per-day or per-year basis, dependent on grant start and end dates as detailed in the original data download.

### Calculated Open Philanthropy funding

Open Philanthropy is a philanthropic organisation, funding both PDPs and other organisations, including industry and academic institutions. Committed grants are retrieved from their [grant page](#). Relevant funding is identified and previously disbursed amounts are confirmed by the funder via email. Any remaining funding is then prorated in equal amounts over the rest of the award period. Prorating funding equally over the remaining life of the grant may not be entirely true to reality, as Open Philanthropy typically front-load their award disbursements. However, without actual disbursement figures from the funder, equal proration of the remaining funding over the remaining life of the grant is the most sensible approach.

### Calculated Wellcome funding

Wellcome is a philanthropic organisation, funding both PDPs and other organisations, including industry and academic institutions. Data is retrieved from the [Wellcome](#) dataset of funded projects published online. A keyword search approach is applied to the new data to identify grants in line with the G-FINDER scope. The project value for new grants is prorated across the project duration based on calculated payments per day. Continuing grants already in our historical dataset are prorated based on the remaining project value.

### Calculated US NIH funding

The US National Institutes of Health (US NIH) is a public science and technology agency, funding both PDPs and other organisations, including industry and academic institutions. PDP funding was retrieved from [RePORTER](#) by searching for a pre-set list of recipients. RePORTER only includes disbursements per financial year, so no prorating was applied to the funding amounts.

To estimate total FY2023 non-PDP funding for neglected disease R&D from NIH, our standard search term approach was applied to RePORTER, and the % of in-scope funding we included in FY2022 was applied to the FY2023 results. This is a crude measurement but meets the needs for the purpose of Compass. We are investigating the use of machine learning to better predict US NIH funding for neglected disease R&D.

### Calculated USAID funding

The US Agency for International Development (USAID) is a public aid agency, funding both PDPs and other organisations, including industry and academic institutions. Retrieving future funding from USAID to PDPs relied on the grant numbers reported to us in the G-FINDER survey and may therefore miss new funding to PDPs. Award numbers were entered in [USAspending.gov](#) and any outstanding funding that had not yet been reported to G-FINDER was prorated in equal amounts over the rest of the award period. It is currently not possible to estimate non-PDP funding from USAID and this funding is therefore only represented in the Other funding (historical) segment of our data.



### **Calculated EC funding**

The European Commission (EC) is a public science and technology agency, funding both PDPs and other organisations, including industry and academic institutions. Data is obtained from the [Cordis EU research projects site](#), with recent projects falling under the frameworks for H2020 and HorizonEurope. The datamining approach uses pre-defined search terms to identify new grants in line with the G-FINDER scope. Calculated payments are estimated by prorating the project value across years based on the project duration and calculated payment per day for the funder financial year.

### **Calculated German BMBF funding**

The German Federal Ministry of Education and Research (BMBF) is a public science and technology agency, funding both PDPs and other organisations, including industry and academic institutions. BMBF, through KfW, announced PDP funding for its 2023-2028 cycle in mid-2023. Total amounts per recipient were confirmed by the funder via email and prorated in equal amounts over the rest of the award period. It is currently not possible to estimate non-PDP funding from BMBF and this funding is therefore only represented in the Other funding (historical) segment of our data.

### **Calculated Netherlands Ministry of Foreign Affairs funding**

The Netherlands Ministry of Foreign Affairs (including DGIS) is a public aid agency, only funding PDPs. The Netherlands Ministry of Foreign Affairs (including DGIS) announced PDP funding for its PDP IV Fund in late-2022. Total amounts per recipient were confirmed by the funder via email and prorated in equal amounts over the rest of the award period, accounting for a small portion of the funding having already been included in the FY2022 G-FINDER survey.

### **Calculated Unitaid funding**

Unitaid is a multilateral organisation, funding both PDPs and other organisations, including industry and academic institutions. PDP funding was retrieved from their [projects page](#) and prorated in equal amounts over the rest of the award period, accounting for a portion of the funding having already been included in the historical G-FINDER survey. Non-PDP funding from USAID has not yet been retrieved for Compass purposes and this funding is therefore only represented in the Other funding (historical) segment of our data.

### **Calculated Danish Ministry of Foreign Affairs funding**

The Danish Ministry of Foreign Affairs (DANIDA) is a public aid agency, funding both PDPs and other organisations, including industry and academic institutions. PDP funding was retrieved from [Open Aid](#) and prorated in equal amounts over the rest of the award period, accounting for a portion of the funding having already been included in the historical G-FINDER survey. Non-PDP funding from the Danish Ministry of Foreign Affairs has not yet been retrieved for Compass purposes and this funding is therefore only represented in the Other funding (historical) segment of our data.



# Tutorial

## Overview page

From here you can navigate to each Compass data slice by clicking each of the relevant buttons:

Or by clicking the arrows at the bottom center of the page:

## General functionality

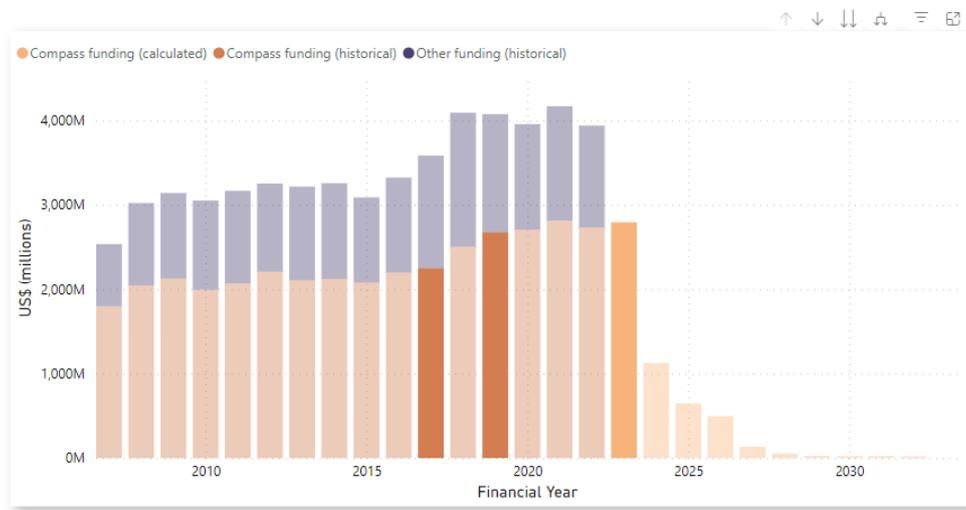
### Filtering

Any filter applied in a Compass data cut will apply to all graphs and figures in that data cut. When you exit the visualisation, all filters will be reset. For the main visualisation of each page, this will change the filtered totals for the sections you have filtered for. Below is a breakdown of the possible ways to filter in most visualisations.



### Filter via the visualisation

To filter by funding type, click either the legend label on the chart, or the section of the chart you wish to filter for.



In the Total ND It is also possible to filter by using the Disbursement or future payment check boxes to the top right of the visualisation. Using CTRL + click will let you select multiple filters. To remove the filters, use the eraser icon, as in the screenshot below, that appears when you hover over the filters

- Disbursement or future payment 
- Compass funding (calculated)
  - Compass funding (historical)
  - Other funding (historical)

### Filter by funder

For the Total ND R&D funding visualisation it is possible to filter by funder. To do this, click the desired organisation. To filter for more than one organisation, hold CTRL on your keyboard, and click the combination of desired organisation. It is possible to filter for more than one funder using the search bar above the list of funders. Search for the desired organisation, hold CTRL on your keyboard, and click the desired organisation. Let go of CTRL and click the cross in the right of the search box. Repeat until you have selected the list of desired organisations.




**Funder**

- Academic Medical Center
- Academy of Finland
- African Programme for Onchocerciasis Control
- Aggregate industry

**Filter by disease**

To filter for a disease, click the drop-down box labelled Diseases.

Diseases

This will open a selection pane of all neglected disease funding contained in this Compass data cut.

Select all  
 Bacterial pneumonia & meningitis  
 Buruli ulcer  
 Cryptococcal meningitis  
 Dengue  
 Diarrhoeal diseases  
 Helminth infections (worms & flukes)

All

From here, you can scroll and click a disease to filter for just that disease’s funding in the visualisation. To filter for more than one disease, hold CTRL on your keyboard, and click the squares of the desired combination of diseases. If you only want to filter out a small number of diseases, click ‘Select all’ at the top of the drop-down and then CTRL + Click the diseases that you would like to include. These will result in the dropdown box looking something like the below screenshot.

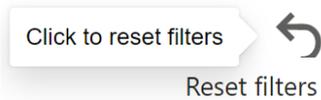


Select all  
 Bacterial pneumonia & meningitis  
 Buruli ulcer  
 Cryptococcal meningitis  
 Dengue  
 Diarrhoeal diseases  
 Helminth infections (worms & flukes)

Multiple selections ^

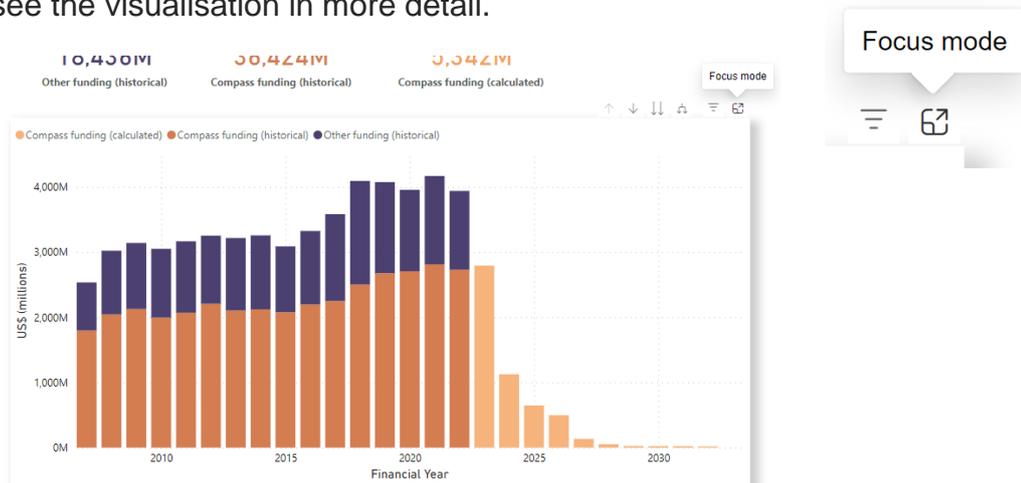
### Clearing filters

At the bottom right of each page is a curved arrow labelled Reset filters. Click this button to reset all filters on the visualisation you are on.



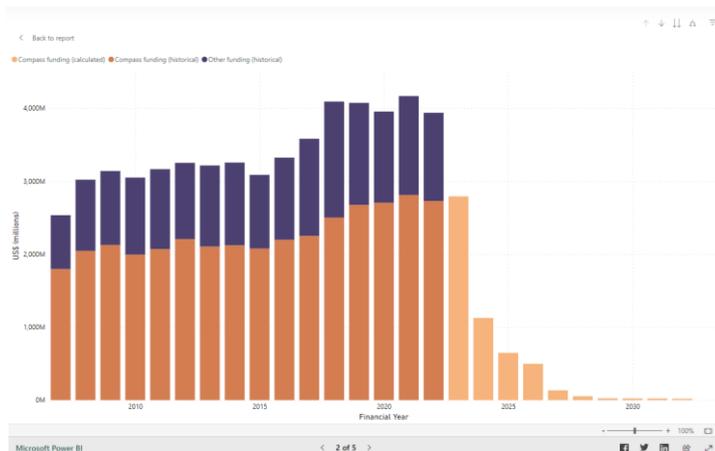
### Focus mode

Focus mode lets you expand (pop out) a visualisation to see more detail. While in focus mode, you can interact with any filters as normal. Focus mode can be applied to all individual report visuals in the Compass dashboard. To access focus mode, hover over the visualisation and look to the icons at the top right. Then Click the rounded square and arrow icon to 'pop-out' the visual. Clicking this will lead you to a full screen of the visualisation, where you will be able to see the visualisation in more detail.





This will result in the figure filling the entire visualisation screen. From here, you can click the figure bars and legend labels to filter as normal.



To exit focus mode, click the Back to report button at the top left of the visualisation.

< Back to report

### Exporting data

All visualisations have the option to download the entirety of the data behind that visualisation. To do this, look to the top of the page to the description. At the end of the paragraph is a blue underlined hyperlink. Clicking this will prompt a download of an .xlsx file relevant to that visual. From here save it to your desired location and explore the data in excel. It is not possible to download data for only the selected filters. All filters applied will have to be reapplied in excel.

### Scale

At the bottom right of the window is a scale slider. From here you can click the plus (+) or (-) icons to change the scale, or the rectangle to the right of the percentage to have the Compass portal fit to your screen.



Alternately, you click the percentage number to be given options to set your scale.

