

The I/UCRC Planning Meeting:

Steps for planning and running a successful meeting

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History: Wood-Based Composites Center

- Established in 1999.
- Existing support from industrial members.
- Existing partner university structure.
- Similar to an I/UCRC in many ways.
- Industry-led strategic planning process determined direction.
- Seeking to elevate the research effort and significance of the WBC through establishing an I/UCRC WBC Center.
- Planning grant awarded on February 1, 2009.
- Planning meeting held October 1-2, 2009 in South Lake Tahoe, Nevada.



Read the Purple Book

***Managing the Industry/University Cooperative Research Center:
A Guide for Directors and Other Stakeholders***

Dennis O. Gray

S. George Walters

Read it all, but focus on Chapter 2, which speaks directly to the Pre-planning and Planning stages. Find useful tools in the Chapter 2 Appendix.

Poll Existing Industrial Supporters

Who Should We Invite?

Meeting Location?

Research Focus Areas?

Director(s) Define Vision and Plan

Invitees

Seek NSF Assistance

Meeting Location and Date

Faculty Participation (Research Proposals)

Assign Planning Responsibilities

Inviting Industrial Members

(9-12 months prior to meeting)

- Develop list of potential members, meeting participants.
 - Research business details, locations, products.
 - Secure appropriate contact information.
 - Seek input from existing industry supporters.
- Send formal invitations.
- Follow up with personal contacts.
- Develop planning meeting participant list.
- Make sure marketing material, website are updated prior to sending invitations.

Seek NSF Assistance

(6-9 months prior to meeting)

- The Purple Book is helpful: read it cover-to-cover.
- Contact Program Director with questions, preliminary agenda.
- Identify an Evaluator and work to include him/her in planning the meeting. Program Director can help with identifying an Evaluator (Program Director determined our Evaluator, we extended an invitation).

Meeting Location and Date

(6-9 months prior to meeting)

- Carefully select meeting location and date. Consider tagging onto an existing conference or trade show. On-campus can work too, with careful planning.
- Consider your guests: easy access by air/car, comfortable meeting and hotel accommodations, internet access.
- Confirm location and dates with NSF folks, key faculty.
- Contract with hotel/conference center early, and include arrangements for internet access (and power), AV needs, and food & beverage service.
- Consider a change of venue, a more upscale location, for evening events, one that encourages socializing.

Faculty Participation/Research Proposals

(3-6 months prior to meeting)

- Communicate research focus areas to faculty, request proposals as soon as possible.
- Provide Project Proposal Report Form (Appendix 2-2 in the Purple Book) as a template.
- Provide a sample of the Level of Interest Feedback Evaluation (L.I.F.E.) Form (Appendix 2-4).
- Director(s) should limit the number of proposals presented during the meeting (no more than 10).

Develop Meeting Materials

(1 week to 3 months prior to meeting)

- Develop meeting agenda and participant list and distribute prior to the meeting.
- Confirm job titles, nametag requests and dietary needs with participants directly. Everyone has a nametag upon arrival.
- Set deadline for submission of materials for inclusion in the meeting notebook. Make notebook nice (bound, color copies). Disallow handouts or paper shuffling during the meeting.
- Have individual on-line L.I.F.E. Forms prepared prior to the meeting (your NSF Evaluator can help with this!). Use the on-line forms, but have paper copies available in meeting packets.

Communication

(1 week to 6 months prior to the meeting)

- Maintain an electronic distribution list of all meeting participants and stakeholders.
- Avoid excessive emails, communications.
- Make sure they bring their computers with them to the meeting.

Space and Time

- Stick to the agenda.
- Set up meeting room to encourage discussion.
- Preload all presentations and test the meeting computer. Use a single “linked” agenda slide to maneuver between presentations.
- Someone (not the Director!) is responsible for making sure the room is comfortable, no outside disturbances, food service is in order and on-time, and meeting runs smoothly.
- Graduate students are helpful (set-up, breakdown, running the registration table). Industry folks love meeting the students!
- Stick to the agenda.

Meeting Content

- Director reviews all proposals for familiarity prior to meeting.
- Allow time for and promote discussion throughout meeting. But, stick to the agenda.
- Identify and clearly communicate “next steps”; assign deadlines and responsibilities.
- Include graduate students in all meals and social events.

After the Meeting

- Make meeting material and summary of L.I.F.E. Forms available to all participants. On-line access is best.
- Meet follow-up deadlines, maintain communication.

What Went Well

- A strong, industry-led strategic planning process preceded the planning meeting.
- Tagging onto the end of a major international conference maximized participation and saved travel costs.
- An experienced Managing Director planned and coordinated all meeting arrangements.
- Strong faculty participation from WBC partner universities.
- On-line resources (website, research forum) were kept up-to-date with meeting information and content.
- Well-known and respected Directors have established industry relations and support.
- Existing WBC Center members provided strong support during and following meeting.



Key Learnings

- Get the “right” folks, the financial decision-makers, to the planning meeting.
- The recession has put our success at risk.
- Use existing industry contacts to help recruit new members.
- Personal follow-up and relationship building is key to keeping folks engaged after the planning meeting. Use the momentum gained during the planning meeting to your advantage. Seek commitments for membership shortly after the meeting.
- Don't forget to arrange for electrical power stations at the meeting room table!

