

Evaluation practices that inform the IUCRC program LIFE Form Review and World Café Sessions



Image designed by Nancy Margulies
Photo courtesy of The World Cafe

L.I.F.E. LEVEL OF INTEREST
AND FEEDBACK
EVALUATION FORMS



Evaluation practices that inform the IUCRC program

LIFE Review & World Café Sessions, June 2015

- Goals
 - Use IUCRC Evaluation Team to summarize the top three evaluation practices and issues that warrant further discussion
 - Collect individual insights from each evaluation team member
 - Use guided small group discussions and reporting (on-line) to connect ideas, insights, and preliminary recommendations
- Methods
 - Two minute flash presentations of key evaluation topics limited to ≤ 2 PowerPoint slides
 - One minute (+/-) LIFE form feedback from all Evaluators after each presentation
 - LIFE feedback review & discussion at 2:35 pm to select World Café topics (3:15 pm)
 - List of key next steps and champions (11:45-noon, Day 2)



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LIFE Review & World Café Session

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LIFE Forms are...

- Used to support both project selection and on-going project feedback
- A way to support IAB research discussions and help generate ideas to support research projects
- NOT a voting process



LIFE Process to identify good follow-on discussion topics this afternoon:

Shared Relevance

-> Go to: IUCRC.COM



- > Select Meeting:

➤ **June 11th, 2015**

Evaluator LIFE Topics

- > Use password: innovate2015



LIFE Comments to identify important content: *Individual Insight*

Please provide any comments, questions or suggestions you have about this project, the progress made, and technical or implementation issues.

Comments:

Provide any comments about this project here.

Question:

Provide any questions about this project you would like the PI to address

Suggestion:

Provide any suggestions you have for improving this project or making it more relevant to you needs or interests

Note: This information will not be divulged during the review

Your Name:

Your Organization:



World Café Method

This methodology is a simple, effective, and flexible format for hosting large group dialogue (for more see: www.theworldcafe.com).

1) **Small Group Rounds:** cafe conversations are **two or more ten-minute rounds of conversation** for a small group seated around a table. At the end of the ten minutes, all but one member of the group move to a different new table. The **one remaining person will act as the "table host"** for the next round, who welcomes the next group and briefly fills them in on what happened in the previous round.

2) **Each round is prefaced with a question.** The same questions can be used for more than one round, or they can be built upon each other to focus the conversation or guide its direction.

3) **Harvest:** After the small groups (and/or in between rounds) table hosts and others are invited to share insights or other results from their conversations with the rest of the large group.



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PRINCIPLES FOR HOSTING CONVERSATIONS THAT MATTER

The quality of our listening is often the most important factor determining the success of a Café conversation.



HOSTS: Please use this link to capture your group's ideas and recommendations:
<https://www.surveymonkey.com/s/iucrc2015eval>

Graphic from: <http://www.theworldcafe.com>



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LIFE Form Review Presentations



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I/UCRC Annual Evaluators Meeting, Washington DC
June 11-12, 2015

1. Building online, interactive benchmarking reports (or dashboards)

Drew Rivers

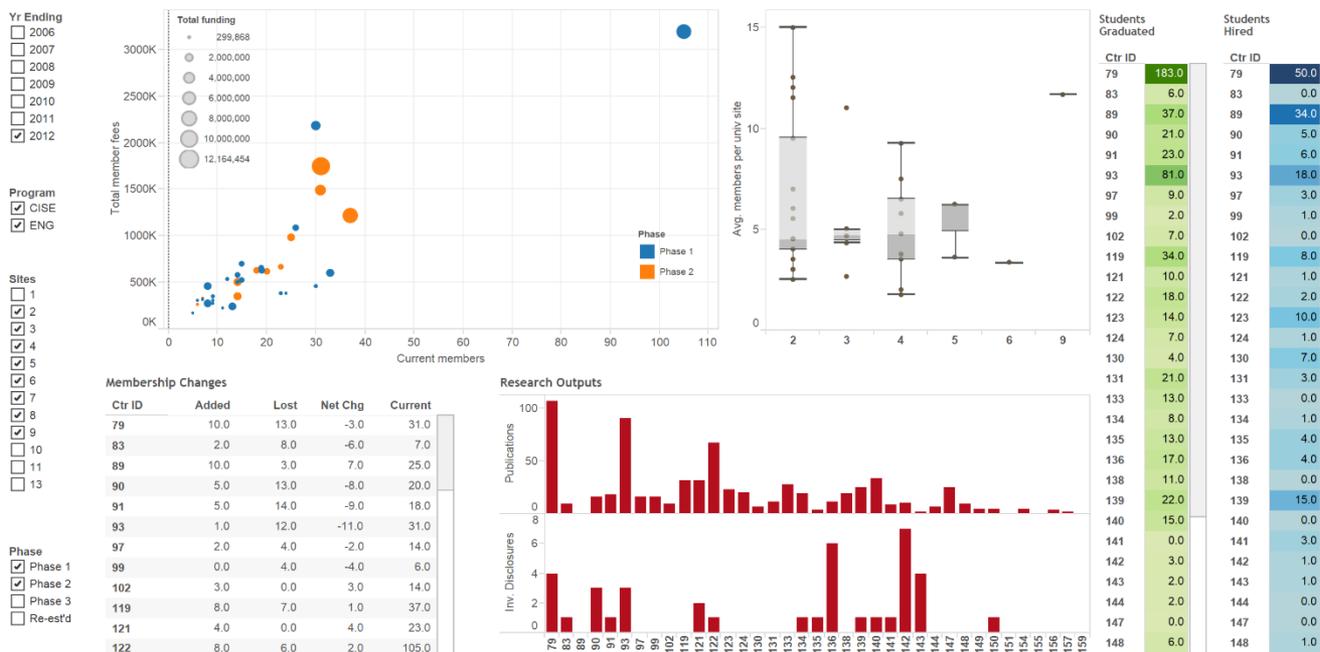


1. Interactive Benchmarking Reports

Drew Rivers

- **Topic Summary:** We should have an interactive dashboard(s) containing I/UCRC program data...
- **Importance:** ... so we can communicate the size and influence of the program and easily compare inputs and outcomes across centers.

Cooperative Research Centers, Program Data (demo)



dashboard



1. Interactive Benchmarking Reports

Drew Rivers

What LIFE comments would be helpful to collect?

- In what ways, if at all, could you make use of a dashboard like this in your role as evaluator?
- Would your center directors and IAB members be interested in having access to a dashboard?

Open Ended Questions for World Café Session

- What indicators/ metrics would you like to see included in such a dashboard, and what segmentations would you like to have available—e.g., number of sites, program funding source, phase, year founded, etc.
- What are the pros and cons of making I/UCRC program data available via interactive dashboards to all I/UCRC stakeholders... and to the general public? (Open access is the cost of a 'free' dashboard.)



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2. Life Form Use and Research Review Facilitation Ideas

Stephanie Shipp, Drew Rivers, and Dee
Hoffman



2. Life Form Use and Research Review Facilitation Ideas; Stephanie Shipp and Drew Rivers

Topic summary

- The LIFE process (including online forms and feedback discussion) is a core activity of an I/UCRC center
- Centers vary in how engaged IAB, faculty, and students get in the LIFE process
- Understanding what works well or not so well could improve the implementation of LIFE across all centers

Importance to I/UCRC Program

- The LIFE process is designed to help align IAB needs and university strengths, and is therefore critical to the health of an I/UCRC.



2. Life Form Use and Research Review Facilitation Ideas; Stephanie Shipp and Drew Rivers

What LIFE comments would be helpful to collect?

- - Is the LIFE process (online forms and feedback discussion) working well for your center(s)?
- - What would you like to improve about the LIFE process at your center(s)?

Open Ended Questions for World Café Session

- - What are some ways to increase IAB participation in completing LIFE forms?
- - Why do some IAB members not participate in completing the LIFE forms?
- - Why should center leaders care about IAB and faculty participation in the LIFE process?



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3 Organizing and Writing the
Annual Evaluator's Report (AER)

Craig Scott



3 Organizing and Writing the Annual Evaluator's Report (AER)

Craig Scott

REQUIRED: Write annual summary of significant Center developments to document Center status for: Center's Sites; IAB, and; the I/UCRC Program.

Scott's Recommendation: Work on AER throughout the year.

Components:

1. Coversheet: <http://www.ncsu.edu/iucrc/ResourcesForEvaluators.htm#activities>
2. Summary of Center Status, Activity & Accomplishments for the Preceding Year: <http://ncsu.edu/iucrc/ResourcesForEvaluators.htm#EconImpact> (see Section 2.4)
3. Meeting Reports for Each Center Meeting: <http://www.ncsu.edu/iucrc/>
4. Document Research Success Story(ies): see Section 2.4.7.1 of above URL
5. Transcript of Economic Impact Interview(s): see Section 4.0 of above URL
6. A Listing of Issues, Concerns and Recommended Improvements
7. Summary of Outcome Surveys: see Sections 3.2.4 & 3.2.5 of above URL
8. IUCRC Meeting Best Practices Checklists: see Section 2.5.10 of above URL
9. Chronological Major Events Since Center was Established



From a recent EI Interview

Can you speculate regarding economic impact of your Center involvement?

- *Long term, there is a lot of impact here; it's just so darn hard to quantify. Even if we had economist input that would be the case.*
- *That said, there are so many ways for member firms to realize economic impact. THE CENTER helps us coordinate our knowledge. Because CENTER research looks across boundries, the research and the networking that goes on here are truly contributing to these improved recognitions and understandings.*
- *We are beginning to better recognize new basic science connections. The differences we are seeing are huge and are gradually coming to be better understood. This will and in a sense is already paying off. It will produce enormous economic benefit. Quantification of this, however, needs to be done with more than speculated guesses.*



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3 Organizing and Writing the Annual Evaluator's Report (AER)

Craig Scott

What LIFE comments would be helpful to collect?

Is any important information missing from the annual report (AR) as its currently constituted.

Would any information on the current AR would be better collected via other means?

Is there a better approach to providing this information to the NSF?

Open Ended Questions for World Café Session

In 2014 Scott began issuing AER updates following each meeting. He updates the coversheet at the beginning of each year. Is this a good idea?

Should ARs be as all-inclusive and cumulative as Scott suggests?

OPTIONAL WORLD CAFÉ QUESTION:

Should there be a dress code for our meetings? (David M's got a suggestion).



- Placeholder for presentation #4-Terri's logic model



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5. Planning the Center's
research strategy: Tools and approaches for
Center Directors and IAB members

Denis Gray



5. Planning the Center's research strategy: Tools and approaches for Center Directors and IAB members; Denis Gray

Topic summary

- Planning the center's research strategy is...
 - More than deciding which projects to fund for next year
 - More than doing more of the same
 - More than meeting needs of current membership

Importance to I/UCRC Program

- Needs and interest of members (and member prospects) change quickly and have important emergent elements
- After launch most centers spend little or no time on planning their research strategy
 - Most centers have a 1-year planning horizon
- Very little in our “best practice” tool kit for helping centers engage in productive research planning strategy
 - When asked to help I improvise



5. Planning the Center's research strategy: Tools and approaches for Center Directors and IAB members; Denis Gray

What LIFE comments would be helpful to collect?

- Is neglect of research planning handicapping any of your centers?
- What formal research planning strategies have you observed or helped your centers use and how did they work (roadmaps; focus groups; nominal groups; surveys)?
- Do you have research planning tools to share?

Open Ended Questions for World Café Session

- Given its importance, why is research planning neglected?
- How can research planning be made a more routine and effective part of center operations?
- What roles should/could evaluators play in encouraging and supporting more and better research planning?



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**6. IAB-Student mentoring and internships:
Best Practices and New Directions**

Vida Scarpello



6. IAB-Student mentoring and internships: Best Practices and New Directions* comparison to 1 center 12 iab

Topic summary: Based on brief survey of 1AB in 3 Centers

Mentoring students: **never** **sometimes** **often** **always**

•On research projects: 10% 60%(42%) 30%(50%) 0% (8%)

•On industry practices: **rarely** **sometimes** **often** **always**
20%(33%) 60%(42%) 20%(17%) 0% (8%)

•On presentations: 30% 30%(50%) 10%(25%) 30%(25%)

•Communicate w/students: 60%as needed84% w/mo; internet **multiple ways**; median 2hrs/mo. **5 hrs.**

•Student presentations at work location. Yes50% **58%**; no 50% **42%**

Internships: access important: yes 80% **91%**;no 20% **8%** no; paid 100% **100%** . Summers usually, may be multiple; function of company tradition, gov't restriction; university policy/practices.

Importance to I/UCRC Program-student access influenced decision to join for 50%**92%** members. But IAB don't need help from NSF with these ISSUES



6. IAB-Student mentoring and internships: Best Practices and New Directions V. Scarpello

What LIFE comments would be helpful to collect?

Ask Center Directors, Site Directors, Coordinators and NSF. Question is What will make their Centers more productive and what issues are important to their IAB members that may be helped by collection of Life comments. Bad policy for evaluators to think of what can help without knowing what actually can help.

Open Ended Questions for World Café Session

(Please write two or three questions appropriate for our World Café session. See Notes section for details.)

1. Topic should answer the question “so what?” Not necessary if it can’t answer this question.
2. Life forms keep changing and I see directors changing how they are used. Why? Are they currently less useful to the IAB?
3. Why the hesitation to have experts in test development develop reliable and perhaps even valid P/O Surveys and why done yearly?



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**7. The Graduating Center
How Can the Evaluator Help in the Transition**

Otto Doering



7. The Graduating Center

Otto Doering

Topic summary

Graduating is Equivalent to Death and Taxes

Most Centers' Lack Knowledge How to Assess their Staying Power Potential

Basic Helpful Information Lacking about Alternative Structures and Operations

Need for facilitated discussions and Interaction with "Center Confident" on difficult topics

Importance to I/UCRC Program

Graduated Centers are Supposed to Continue Successfully!



7. The Graduating Center

Otto Doering

What LIFE comments would be helpful to collect?

What information do Center Directors need regarding NSF's graduation requirements? How might the solicitation be improved?

How can Phase 2 and 3 Centers prepare the IAB to "trust" the Center after NSF's role is gone?

Open Ended Questions for World Café Session

What three pieces of advice on Center graduation should every Center Director get during Phase 3?

What information would be most helpful to collect (or organize) that would support a graduated Center?

How can the evaluator best support a graduating Center?

How would you define a best case scenario for building a successfully graduated Center (research stewardship, leadership characteristics, administrative practices, IAB characteristics, others)



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**8. Evaluator Tips and Tricks: Best practices
in LIFE form feedback, annual Process
Outcome Survey, and using program-wide
structural information survey**

Donald Davis



8. Evaluator Tips and Tricks: Best practices in LIFE form feedback, annual Process Outcome Survey, and using program-wide structural information survey

Topic summary

- Data can be useful driver for organization change and development
- Centers and evaluators who advise them vary in extent to which they use data to guide change

Importance to I/UCRC

- Continuous improvement in center operations is required to grow and sustain industry memberships and foster innovation, particularly across multiple sites.
- Centers that don't continuously improve slowly die



8. Evaluator Tips and Tricks: Best practices in LIFE form feedback, annual Process Outcome Survey, and using program-wide structural information survey

What LIFE comments, process outcome data and program structural data would be helpful to collect?

- How could collected data be used to benchmark center performance?
- What new data could be collected to better estimate economic impact?

Open-ended Questions for World Café

- Evaluators can best integrate LIFE comments and facilitate LIFE discussion. Do you agree?
- How do you encourage silent IAB members to participate?
- How do you discover questions and suggestions for change that are disguised as comments?
- How does your center ensure that LIFE feedback is implemented and changes projects in the desired way?



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