IUCRC Evaluator Tools

Checklist for Optimizing LIFE and PO Response at IAB Meeting
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***Instructions**: The following set of activities are intended to highlight steps the evaluator can take to optimize the compliance and response rate for both the LIFE forms and P/O questionnaire during the IAB meeting. Obviously, the effectiveness of these steps depends on satisfactory attendance by IAB members.*

Before the meeting agenda is set

- **P/O**:
  - Contact director early to request time on agenda to announce and preferably fill out P/O on site
    - Ideal time is last time block before a break or social hour on day 1
- **LIFE:**
  - Ask admin to remind IAB to bring computer in correspondence
    - Consider putting LIFE completion time on agenda (after every presentation)
  - Request time on agenda to go debrief LIFE

Week or two before the meeting

- **P/O:**
  - Contact Admin for current list and contact info for IAB and faculty
  - Contact Admin for registration list for attendees
  - Develop “war board” of IAB members (and faculty)
    - Prepare “war board” of IAB attending meeting
    - Prepare paper P/O questionnaires and on-site letter for known attendees
      - Bring 3-5 extra questionnaires for last minute attendees
      - Bring return envelopes for those who want to complete at home.
- **LIFE**:
  - Use agenda or contact admin. for list of project presentations
  - Have LIFE weblink listed on the program agenda (http://isl.ucf.edu/LIFE/)
  - Prepare LIFE weblink for all projects; number by order of presentation (if center has own project numbering retain that within the project name).
  - Send center administrator the pdf of the LIFE forms and instruct them to include a full set of forms in the meeting materials given to each member.
  - Prepare PP for evaluator presentation during meeting.

At IAB meeting

- **Other:**
  - Bring copy of evaluator presentation (coordinate with NSF what will be in their presentation)
  - **Bring and complete copy of the IUCRC Bi-annual Meeting Best Practice Checklist and Meeting Summary PowerPoint (if NSF is not in attendance)**
- **P/O:**
  - *If no time on agenda to complete P/O*
    - Hand out with name tags or find each firm/member and give them questionnaire
      - Check off who received and who not present or left center
    - Mention need to complete P/O during evaluator presentation
    - Periodically remind IAB to complete P/O by some set point or before they leave meeting.
    - Log in returned questionnaires as they come in; track down missing questionnaires.
  - *If time on agenda to complete P/O*
    - See if anyone will be leaving before questionnaire session; ask them to complete before they leave

- Hand out questionnaire to all attendees during session (anticipate who might leave early)
  - Check off who received and who is not present
- Ask them to complete and return
  - Log in returned questionnaires;
  - Note any who want to complete after meeting or ask to complete on web

- **LIFE**:
  - Collecting data:
    - Mention need to complete LIFE for every project during evaluator presentation
      - Note and/or post website and password
      - Let faculty know they can see comments "real-time"
      - Give hard copy to people without laptop
    - Remind to complete after each project
    - Collect paper LIFE immediately or after each break
    - Enter paper LIFE as they come in
  - Preparing data:
    - Enter site as admin: prepare pdf summary of feedback
      - If time permits, convert pdf to word and organize feedback into categories: *Suggestions*; *Questions; Comments;* Highlight significant comments
  - Reviewing feedback:
    - Decide who will go over the comments (e.g., director, IAB chair, evaluator)
    - Develop strategy for covering comments given time available
    - Upload pdf on meeting computer
    - Review comments and ask author of comments, if present, to clarify the implications of comments;
      - Decide if there are any critical action items

After IAB Meeting

- **P/O**
  - Data Collection from non-attendees and respondents
    - Industry
      - Use war board/returned questionnaires to prepare respondent list for the email version of the P/O
    - Industry and Faculty
      - Immediately after meeting send email requesting respondent to complete P/O questionnaire
      - Maintain "war board" on responses
      - Approximately 10 days after first request send second request for response
      - If response disappointing, have final request sent by each site director
      - If response still disappointing, conduct telephone calls to complete questionnaires over the phone
  - Data processing
    - Begin entering answers to open-ended comments into spreadsheet immediately
    - Continue data entry including forced choice as new data comes in
- **LIFE**:
  - Consider leaving weblink open for non-attendees to make comments; center must contact them
  - Provide Center with access to comments and/or pdf to be uploaded onto center website
    - Give directors/admins. Copy of comments with have identifying names