EVALUATOR MEETING
June 15 - 16, 2006
HOLIDAY INN ROSSLYN / KEY BRIDGE, ARLINGTON, VIRGINIA
WELCOME & INTRODUCTION

8:00 - 8:40 am
Thursday, June 15, 2006

2006 EVALUATOR MEETING
Arlington, Virginia

INDUSTRY / UNIVERSITY COOPERATIVE RESEARCH CENTERS PROGRAM

NATIONAL SCIENCE FOUNDATION
OBJECTIVES

1. EVALUATOR UPDATE: Enable NSF to brief I/UCRC Evaluators on policies & updates concerning the I/UCRC program & Evaluator role.

2. RESEARCH FORUM: Present, review and discuss current findings of NSF-supported research from the I/UCRC Evaluation Program.

3. INFORMATION EXCHANGE: Vehicle for I/UCRC Evaluators to exchange information & ideas about best practices for the role.

4. INNOVATIONS IN EVALUATION: Present and discuss new findings, theory & applications concerning evaluation of R&D, cooperative research, innovation management & related topics.
MEETING AGENDA

Thursday, June 15th - Dogwood Room

7:30 - 8:30 am  ................. Registration, Continental Breakfast
8:00 am - 12:00 pm ......... MORNING SESSION
12:00 - 1:30 pm .............. Lunch (on your own)
1:30 - 4:45 pm .............. AFTERNOON SESSION
5:00 - 6:00 pm .............. Evening Reception (with Cash Bar)

VANTAGE POINT - 17th Floor

Friday, June 16th - Dogwood Room

7:30 - 8:30 am  ................. Continental Breakfast
8:00 am - 12:00 pm ......... MORNING SESSION
12:00 noon ...................... Adjourn

Adjourn
### THURSDAY MORNING SESSION

<table>
<thead>
<tr>
<th>Time</th>
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<tbody>
<tr>
<td>8:00 - 8:40 am</td>
<td>Welcome &amp; Introduction - Eric Sundstrom</td>
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<td>NSF Update - Alex Schwarzkopf</td>
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<td>8:40 - 9:30</td>
<td>Membership Report &amp; Process-Outcome Report - Denis Gray</td>
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<tr>
<td>9:30 - 10:00</td>
<td>Research Report: Leadership &amp; Upward Influence in NSF I/UCRCs - Don Davis &amp; Janet Bryant</td>
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<td>10:00 - 10:30</td>
<td>BREAK</td>
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<td>10:30 - 11:30</td>
<td>Keynote: Factors that Foster Industry-University Cooperation: Implications for I/UCRCs - Mariann 'Sam' Jelinek, College of William &amp; Mary</td>
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<tr>
<td>11:30 am - noon</td>
<td>Questions &amp; Discussion: Evaluators' Roles in Industry - University Cooperation</td>
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<td>12:00 noon</td>
<td>LUNCH on your own</td>
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NSF I/UCRC PROGRAM UPDATE
Alex Schwarzkopf

8:10 - 8:40 am  - Thursday, June 15, 2006

2006 EVALUATOR MEETING
Arlington, Virginia

INDUSTRY / UNIVERSITY COOPERATIVE RESEARCH CENTERS PROGRAM

NATIONAL SCIENCE FOUNDATION
MEMBERSHIP REPORT & PROCESS/OUTCOME REPORT
Denis Gray
8:40 - 9:30 am - Thursday, June 15, 2006

2006 EVALUATOR MEETING
Arlington, Virginia

INDUSTRY / UNIVERSITY COOPERATIVE RESEARCH CENTERS PROGRAM

NATIONAL SCIENCE FOUNDATION
Research Report: LEADERSHIP & UPWARD INFLUENCE IN NSF I/UCRCs

Don Davis & Janet Bryant

9:30 - 10:00 am - Thursday, June 15, 2006
FACTORS THAT FOSTER INDUSTRY-UNIVERSITY COOPERATION: IMPLICATIONS FOR I/UCRCS

Mariann 'Sam' Jelinek

10:30 - 11:30 am - Thursday, June 15, 2006

2006 EVALUATOR MEETING
Arlington, Virginia

INDUSTRY / UNIVERSITY COOPERATIVE RESEARCH CENTERS PROGRAM
NATIONAL SCIENCE FOUNDATION
QUESTIONS & DISCUSSION: EVALUATORS' ROLES IN UNIVERSITY COOPERATION

11:30am - Noon - Thursday, June 15, 2006

2006 EVALUATOR MEETING
Arlington, Virginia

INDUSTRY / UNIVERSITY COOPERATIVE RESEARCH CENTERS PROGRAM
NATIONAL SCIENCE FOUNDATION
QUESTIONS FOR DISCUSSION

• How does having an Evaluator at an I/UCRC affect Industry / University cooperation?

• What can Evaluators do to improve cooperation?

• What mistakes by an Evaluator might make Industry / University cooperation more difficult?

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<table>
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<th>Time</th>
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</table>
| 1:30 - 2:30 pm | **Evaluator's Role** - Eric Sundstrom  
**Evaluator Toolbox** - Stephen McGregor |
| 2:30 - 3:00   | **BREAK**                                                            |
| 3:00 - 4:00   | **LIFE Form Process: Theme & Variations** - Otto Doering            |
| 4:00 - 4:45   | **Best Practices Online Survey of Evaluators: Results from 2006 vs. 2002** - Craig Scott |
| 5:00 - 6:00 pm| **EVENING RECEPTION:**  
Vantage Point Rooftop Restaurant, 17th Floor |
EVALUATOR'S ROLE
Eric Sundstrom

1:30 - 2:00 pm  - Thursday, June 15, 2006

2006 EVALUATOR MEETING
Arlington, Virginia

INDUSTRY / UNIVERSITY COOPERATIVE
RESEARCH CENTERS PROGRAM

NATIONAL SCIENCE FOUNDATION
NSF I/UCRC EVALUATOR'S ROLE

- Independent role for an NSF Industry / University Cooperative Research Center
- Evaluate Center structure, process, results, adherence to Program policy & practices
- Support the NSF I/UCRC Evaluation Project via data-collection, analysis, and reporting
- Represent NSF I/UCRC Program at Center
- Represent Center to NSF I/UCRC Program
NSF I/UCRC EVALUATOR'S DUTIES

- Prepare the Annual *Evaluator's Report* to NSF
- Represent NSF at the Center's Annual Spring & Fall Industrial Advisory Board meetings
- Administer NSF *Industry Questionnaire & Faculty Questionnaire* in Fall meeting; Analyze, archive, and report to the Center
- Represent the Center at annual I/UCRC Director & Evaluator meetings in Arlington
- Advise Center Director on I/UCRC practices
- Conduct Exit Interviews with Industry sponsors
<table>
<thead>
<tr>
<th>Month</th>
<th>Event</th>
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<tbody>
<tr>
<td>January</td>
<td>I/UCRC Director / Evaluator meeting, Arlington</td>
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<tr>
<td>March</td>
<td>Annual Evaluator's Report to NSF</td>
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<tr>
<td>April</td>
<td>Spring Industrial Advisory Board Meeting: LIFE Forms; Report Questionnaire Results to Center</td>
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<tr>
<td>June</td>
<td>Annual I/UCRC Evaluator Meeting Meeting, Arlington</td>
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<td>Sept.</td>
<td>Fall planning meeting with Center Director(s), University site visits, exit interviews</td>
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<td>Oct. - Nov.</td>
<td>Fall Industrial Advisory Board meeting: Industry / Faculty Questionnaires; LIFE Forms</td>
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ANNUAL EVALUATOR'S REPORT

- CENTER'S CURRENT STATUS: University sites, NSF Funding, Leadership, Members, Budget
- OBJECTIVES & GOALS: Center's Mission, Vision, ...
- ENVIRONMENTAL-INSTITUTIONAL CONTEXT
- ORGANIZATION: Structure, Personnel, Hosting
- RESEARCH PROGRAM: Themes, Projects
- CENTER ACCOMPLISHMENTS: Knowledge Products, Technology Transfer, Educational Impact, ...
- TIME-LINE: Key Events by Month
NSF INDUSTRY & FACULTY QUESTIONNAIRES

- Integral elements of the I/UCRC Evaluation Project at North Carolina State University
- Nation-wide, longitudinal, evaluation of Center & Program processes, outcomes
- Evaluator administers at Center's Fall IAB meeting
- Evaluation Project reports national results
- Evaluator reports Center's results vs. national results at Spring IAB Meeting
**NOT THE EVALUATOR'S ROLE**

- Assessing the technical quality of Center research
- Evaluating Center Scientists' performance
- Performing Center administrative / managerial duties
- Recruiting Industry Members for the Center
- Developing Center policies or operational procedures
- Making arrangements for IAB meetings
- ?
The "Purple Book"

*Managing the Industry / University Cooperative Research Center:*


by Denis O. Gray & S. George Walters

On-line at: [http://www.ncsu.edu/iucrc/](http://www.ncsu.edu/iucrc/)
EVALUATOR'S TOOLBOX

Stephen McGregor

2:00 - 2:30 pm  - Thursday, June 15, 2006
L.I.F.E. FORM PROCESS: THEME & VARIATIONS
Otto Doering

3:00 - 4:00 pm - Thursday, June 15, 2006

2006 EVALUATOR MEETING
Arlington, Virginia

INDUSTRY / UNIVERSITY COOPERATIVE RESEARCH CENTERS PROGRAM
NATIONAL SCIENCE FOUNDATION
BEST PRACTICES ONLINE
SURVEY OF EVALUATORS:
RESULTS FROM 2006 vs. 2002
Craig Scott
4:00 - 4:45 pm  - Thursday, June 15, 2006

2006 EVALUATOR MEETING
Arlington, Virginia

INDUSTRY / UNIVERSITY COOPERATIVE
RESEARCH CENTERS PROGRAM
NATIONAL SCIENCE FOUNDATION
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<td><strong>Evaluator Research: Reports, Proposals, Agenda</strong>&lt;br&gt;David Tansik&lt;br&gt;<strong>Student Evaluations Study Report of Findings</strong> - Jennifer Schneider&lt;br&gt;<strong>Recruitment Study - Progress Report</strong> - Denis Gray &amp; Drew Rivers&lt;br&gt;<strong>Proposal: Predictors of Graduated I/UCRC Success</strong> - Lindsey McGowen</td>
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<td>9:30 - 10:00</td>
<td><strong>BREAK</strong></td>
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<td>10:30 - 11:30</td>
<td><strong>New Evaluator Protocol &amp; Evaluator's &quot;Other Duties Upon Request&quot;</strong> - Denis Gray</td>
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<tr>
<td>11:30 - noon</td>
<td><strong>Next Steps</strong> - Eric Sundstrom&lt;br&gt;<strong>Closing Comments</strong> - Alex Schwarzkopf</td>
</tr>
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<td>12:00 noon</td>
<td><strong>ADJOURN - Leave Evaluations, please!</strong></td>
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EVALUATOR RESEARCH: REPORTS, PROPOSALS, AGENDA
David Tansik

8:00 - 9:30 am - Friday, June 16, 2006

2006 EVALUATOR MEETING
Arlington, Virginia

INDUSTRY / UNIVERSITY COOPERATIVE RESEARCH CENTERS PROGRAM
NATIONAL SCIENCE FOUNDATION
NEW EVALUATOR PROTOCOL & EVALUATOR'S 'OTHER DUTIES UPON REQUEST'

Denis Gray

10:00 - 11:30 am - Friday, June 16, 2006

2006 EVALUATOR MEETING
Arlington, Virginia

INDUSTRY / UNIVERSITY COOPERATIVE RESEARCH CENTERS PROGRAM

NATIONAL SCIENCE FOUNDATION
NEXT STEPS, CLOSING COMMENTS
Eric Sundstrom, Alex Schwarzkopf

11:30 am - 12:00 noon - Friday, June 16, 2006

2006 EVALUATOR MEETING
Arlington, Virginia

INDUSTRY / UNIVERSITY COOPERATIVE RESEARCH CENTERS PROGRAM
NATIONAL SCIENCE FOUNDATION
NEXT STEPS

- I/UCRC Directors' Meeting - January, 2007 - Topics for the Evaluator Agenda?

- Next Evaluator Meeting, June 2007:
  - Same format?
  - Invited Speaker?
  - NSF I/UCRC Program Update
  - Membership Report & Process/Outcome Report
  - Research Reports
  - Evaluator's Role / Protocol
  - ??