Inactive Sponsor Interview Assessment
Opportunity or Albatross?

David Meyer PhD and Craig Scott PhD
Should We Continue the Exit Interviews?

Exit Interview Data was not being systematically collected and analyzed

- Difficult to know the value of this required evaluator activity.

“Do it more systematically for a year, then make recommendations about the future of the exit interview in the IUCRC Center Evaluation Protocol.”
Overview

• Background & Key Questions
• Response Rates
• Quantitative Results
• Qualitative Analysis
• Summary
• Discussion and Recommendations
Background: IUCRC Evaluation

Goals

Primary

• To help document IUCRC outcomes and accomplishments at both the center and program-level

• To promote continuous improvement at both the center and program level by providing data and analysis in a timely way that is actionable and helps identify best practices

Secondary

• To help promote a better understanding of industry/university research cooperation
Key Questions for You

• Can inactive sponsor interview results provide timely and actionable information to I/UCRC stakeholders?

• What is the value of the inactive sponsor interview process?

• Untapped “nuggets” in the exit interviews?
  – individual centers
  – program as a whole
Response Rates

• **ONLY** 21 lapsing memberships reported May to Dec 2008 from 11 different Center Directors (versus the 83 lapsing memberships reported in 2006-07 CD Report)
  – 13 Center Directors reported no lapsing memberships; 14 Center Directors did not respond

• 2007-2008 CD Survey Data lists 129 inactive sponsors
  – sent to respective evaluators on 2/23/09, May 1 due date.

• Interviews Completed: 22
  – 11 interviews completed in two months with shift to Evaluator-driven process
  – Interviews or confirmations from 11 Evaluators
  – 11 different centers represented from 7 different evaluators
Quantitative Results

- Leaving because they were dissatisfied with the Center's administration, operations, or research:
  - 9% (2 of 22)
- Reported Major Disappointments as a Center Member:
  - 9% (2 of 22)
- Gave Improvement Recommendations for Center/NSF
  - 45% (9 of 20) / 55% (12 of 22)
- Would consider re-affiliating with the Center:
  - Yes: 59%  No or Uncertain: 28%  NA: 14%
What was the most important factor that led your firm to withdraw?

- Economic Factors (Ind); 18%
- Economic Factors (Org); 23%
- C/B Mismatch, 14%
- Needs Mismatch, 4%
- Personnel issues, 9%
- Relevance to firm's strategies, 14%
- Relevance to industry needs, 4%
- Firm planned a fixed duration, 9%
- Other; 5%

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Combined Categories: Most important factor that led your firm to withdraw

- Economic Factors, 48%
- Relevance Factors, 32%
- Personnel issues, 8%
- Firm planned a fixed duration, 8%
- Other, 4%
Qualitative Data Analysis

- HyperRESEARCH software
- Three Qualitative Themes:
  - Center Research
  - Center Leadership & Admin
  - NSF Program
Qualitative Themes: Research

Research Factors

Center Leadership – Research (3)
- Project Selection Process (6)
- Focus of Research (3)
- Ability to Direct Research (1)

Industry Priorities (5)
- Industrial Priorities (15)
- Ability to Apply Research Internally (2)

“Research seemed more theoretical than could be applied in a practical manner.”

“How is the Center differentiating itself from other leading centers? They are not there yet, because do not have a strong center recognition, thus need to think about quality of research.”

“Prefer greater collaboration among IAB members on projects rather than individual IAB member companies involved in their own projects.”

“Suggest looking at the project selection process. Part of the issue is the diversity of the sponsors’ interest. You can't please everyone.”

“It’s a matter of where our project stands. I have them on my list as our (internal) project moves forward. Once we move on to other things I will get back into the loop.”

“Minds within [my] organization need to be changed. They need to recognize the value that participating in these centers can bring.”

Note: number in (parenthesis)= number of commented assigned to this factor
Qualitative Themes: Center Leadership and Administration

Center Director—Leadership (8)
- Networking (3)
- Recruitment (2)
- Personal Relationships (2)

Center Administrative Issues (9)
- Marketing Center (3)
- Web Site (3)

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“The major learning point here is that company transitions (in this case a purchase, but it could be change of internal personnel, merger, or other form of organizational change) need to be anticipated and managed by I/UCRC directors.”

“I/UCRC directors [must] manage beyond the simple relationship with their personal contact in industry; they need to manage the organization-to-organization relationship.”

“I think if the center directors had cultivated new relationships with relevant managers in the purchasing firm early in the change process, this firm may still be a member.”

“Coordinate more interaction among IAB members beyond semi-annual meetings and occasional conference calls, e.g., monthly webinars and presentations; project specific joint technical discussions”

“Students didn’t have as much exposure to the Center as they should. They seemed sheltered, and had a ‘deer in the headlights’ reaction to encountering real-world problem. Give students more exposure to the broader world.”

“Administration never received a renewal request, so now we will not think of renewing, since the follow-up problem is notorious.”

“More frequent communications during the year, at least monthly updates, whether newsletter, or any other format.”

“Distribute information about different funding opportunities to IAB members.”

“Make the center’s website more usable and interactive.”

“Get a marketing/public relations professional to make potential industry partners more aware of the work being done…Center is fairly unknown program within industry circles.”
Qualitative Themes: NSF Program Factors

“For our leadership purposes right now, we need a licensing agreement with Industry owning Center developed IP...We pulled out of 6 other research consortia as well because we didn’t have full control over the IP.”

“Encourage wider use of the web-based management and LIFE rating system used at the Friction Stir Welding Center.”

“The current economic climate requires greater creativity and flexibility concerning I/UCRC membership requirements...the foundation had better be prepared to relax their NSF Center minimum membership and funding requirements in order for a Center to remain in good standing with the NSF in the near term.”

“Allow industry partnerships to join as IAB members. This firm is a member of an auto-steel partnership that would like to do projects with an IUCRC.”

“Broader sponsorship will come from exposing results to public.”

“You never hear how your tax dollars are being spent.”

“NSF should get constituents to contact members of Congress (particularly committee chairs) about the good work done by IUCRCs.”

I/UCRC Policies (8)
- LIFE Forms (1)
- IP Issues (2)
- Alternative Funding Option (2)

NSF Administration (2)
- NSF Public Relations (4)

Note: number in (parenthesis)= number of interview comments assigned to this factor
Beyond What We Already Know?

Multivariate Analysis Of Member Retention—Significant Relationships (Gray, Lindblad, and Rudolph, 2001):

- Administrative Operations
- Professional Networking (recruitment & research cooperation)
- Relevance of Research

NO Significant Relationship Found:

- Technical Benefits
- Research Quality
- Structural Characteristics (Center age, membership fee, etc.)

Top Ten Most Frequent Comment Codes

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<th>Code Name</th>
<th>Code Freq</th>
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<td>center leadership – Admin issues</td>
<td>9</td>
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<tr>
<td>center leadership – Center Director activities</td>
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<td>economic situation</td>
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<td>research scope</td>
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Lessons Learned: Getting the Interviews Done

- “Don’t need to ask what I already know” misses improvement recommendations.
- Data collection difficult
  - Automated messages to Center Directors—easier to report a lapsing membership. Does NOT increase compliance with the interview requirement.
  - Assigned responsibility and due dates DO help compliance.
Summary

• Actionable “Nuggets” in Interviews?
  – For Center
    » Responsiveness & Follow-up from Center Administrator
    » Leadership from Center Director
  – NSF/Program:
    » Flexibility in Requirements
    » Greater Program Visibility
Now that we have some data...How about some answers?

- Can inactive sponsor interview results provide timely and actionable information to I/UCRC stakeholders?
- What is the value of the inactive sponsor interview process?
  - Retention Study: Why do they leave?
- Untapped “nuggets” in the exit interviews?
  - individual centers
  - program as a whole
Questions & Discussion
Recommendations

- Give clear responsibility to Evaluator for completing task
- Critical Case + Randomized Sample Design for more complete picture
- Need permission to discuss with Center Director
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