Questions & comments welcome throughout... BUT help me watch the clock
Center Birth and Early Development: Tips for Evaluators At Planning Meetings

Pre-Meeting
“What to Expect When You’re Expecting”

At the Meeting
The “Birth”

Follow up
First Steps of a Long Life
Impacts via a Culture of Communication

IAB Behaviors as an External Boundary Spanner:

- Having discussions with Center faculty to develop new proposals that are consistent with the firm’s goals
- Contacting center investigators outside of Center meetings
- Proposing research ideas and topics for Center investigators to pursue
- Making recommendations to modify research projects already in progress

OUTCOMES

- R&D benefits
- Commercialization
- Networking
- Students Hired
- Follow-On Research Dollar Value
- Research Relevance

Work with the CD Long Before the Meeting
Evaluator: What to Bring

- Presentation: LIFE Form Preview & Role of Evaluation in I/UCRCs
- LIFE materials (electronic or paper)
- Knowledge of solicitation requirements, NSF membership agreement, and I/UCRC membership benefits
- Memorable stories of other centers and IAB experiences
The **Center Birth: Same as a regular IAB Meeting?**

**DAY ONE**

<table>
<thead>
<tr>
<th>Event</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>NSF I/UCRC Presentation</td>
<td>Overview of program (NSF)</td>
</tr>
<tr>
<td>Evaluator intro and LIFE form presentation</td>
<td>(Evaluator)</td>
</tr>
<tr>
<td>LIFE Forms after each project presentation</td>
<td></td>
</tr>
<tr>
<td>Industry Workshop (evaluator moderated or acting as key resource)</td>
<td></td>
</tr>
<tr>
<td>Poster Session (see “conversation tidbits” coming up!)</td>
<td></td>
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</tbody>
</table>

**DAY TWO**

<table>
<thead>
<tr>
<th>Event</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Feedback from Industry Workshop (Industry moderated, evaluator as key resource)</td>
<td></td>
</tr>
<tr>
<td>LIFE Form Discussion (NSF - Evaluator moderated, industry as key resource)</td>
<td></td>
</tr>
<tr>
<td>NSF Closed Session with Industry (NSF &amp; Evaluator moderated)</td>
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</tbody>
</table>
The LIFE process ensures quality and stimulates continued interest in the program.

Comments should include:
- Precompetitive suggestions
- Applications & Industry Benefits
- Suggested change
- Innovativeness of Research
- Industrial relevance
- Similar work done elsewhere
- Offers of help (mentoring?)

Level Of Interest Feedback Evaluation (LIFE)

To facilitate scientific and technical interaction between Center Faculty and Industrial Member Representative, each company represented is requested to rank their company’s level of interest and the research relevancy of each presentation. Please mark an X below to reflect the opinion of your company.

Level of Interest:

- [ ] Very Interested
- [ ] Interested
- [ ] Interested with Change
- [ ] Not Interested
- [ ] Abstain

Comments: _________________________________________________
___________________________________________________________
___________________________________________________________

Comments, questions, and concerns from the transcribed LIFE forms are discussed during the IAB meeting prior to making project funding recommendations.

Bottom Line:
- What makes the project so “hot” or “transformational”?
- How can we improve this project?
- Real-time project revisions are encouraged if needed.

Is this Center worth my time and $50K?
Planning Meetings Are Different

Industry Representatives
Learn IAB member role
Understand benefits of center membership

University Researchers
Learn benefits and limitations of Center-based projects

Center
Asks for commitment from industry (support letters & $)
Creates list of projects to be vetted
Begins to define the “collective good” for that sector: What working norms will best support our Center?

→ Routines that Support Trust and Respect ←
Build Your Collection of Conversation Tidbits

IAB “ownership” of Center

I/UCRCs are full of mixed motives and dynamic processes

- Importance of clear agreements and building trust

Key IAB behaviors as “external boundary spanners”

Center Success Stories from eval reports

Example of successful networking across industry members

Talent recruitment & mentoring successes

"I/UCRCs use a model that has gathered improvement ideas from over 130 Centers active during the last 30 years."
Follow Up Activities

Summary notes/phone call to CD
Evaluator feedback on meeting
Share “Best Practices” sheet
Suggest Center activities before first “real” meeting
  • marketing materials and websites (provide examples)
  • IAB “next steps” & due dates
  • Others —
Learning to Walk: Expect Diversity and Change

- Michael Santoro—Industrial Strategic Objectives in I/Us (Evaluator’s Meeting 2008)
  - Collegial, Aggressive, and Targeted Players
  - Network-Oriented Centers vs. Problem Oriented Centers
- Gray, Lindblad & Rudolph—I/UCRC Member Retention (2001)
  - Networking, research relevance, and administrative operations
- Geisler, Furino, Kiresuk—Patterns of Development and Success (1991)
  - Distinct stages of IUCRC development

Research Opportunities?
- Search and match processes between universities & firms
- Effective management of collaborative Ind - Uni relationships
Best Practices (Discussion)

I will use Google before asking dumb questions.
I will use Google before asking dumb questions.
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I will use Google before asking dumb questions.
Will use Google before asking dumb questions.
Links to Planning Meeting Resources

- Generic Planning Meeting Agenda
  http://www.nsf.gov/eng/iip/iucrc/planningGrantAgenda.jsp

- Proposed Project Executive Summary Form

- LIFE Form Administrator’s Tutorial (see iucrcevaluators.pbworks.com for “user” version)
  http://www.nsf.gov/eng/iip/iucrc/LifeFormTutorial.ppt

- Generic IAB Meeting Agenda
  http://www.nsf.gov/eng/iip/iucrc/firstIABAgenda.jsp

- GET ALL THESE FILES RIGHT NOW AT:
  http://iucrcevaluators.pbworks.com
Managing the Planning Grant

Duane Abata, Coordinator
http://bioenergynow.org
January, 2009