PLENARY CONFERENCE EXTERNAL EVALUATION REPORT FOR
Institutions Developing Excellence in Academic Leadership (IDEAL)
October 10, 2011
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Summary
This report documents Part I of the external evaluation report in Year Three of the NSF Institutions Developing Excellence in Academic Leadership (IDEAL) program. The focus of this memo is the September 16, 2011 Plenary Conference held at Case Western Reserve University. (Part II will detail the final summative findings from the site visits in spring 2012.)

To evaluate this conference, I attended the event and took detailed observational notes. I also analyzed attendance data and an evaluation form designed and collected by IDEAL. I adapt the framework developed by Connolly and Millar (2006) to evaluate workshop impacts and outcomes: participation, satisfaction, learning, and application. (They also discuss “long-term impact,” but this will be evaluated at the Spring 2011 site visits.) As indicated by the evaluation data presented below, the 2011 Plenary Conference was successful at meeting each of these metrics.

(1) Participation
There were 101 invitees to the 2011 IDEAL Plenary Conference, and 94 attendees, or a 93% acceptance rate. (This rate is an uptick from last year’s conference, with 133 invitees and 85 attendees.) There was some attrition throughout the day -- based on my post-lunch headcount of 69 participants-- but it was not extraordinarily high.

In addition to speakers, members of the advisory board, and other guests, attendees included a third (33%) of Year 1, all (100%) Year 2, and most (86%) Year 3 change team leaders. Additionally, over a third (35%) of invited high-level administrators – presidents, provosts, and deans – from participating campuses were present. (See Appendix 1 for campus breakdowns.)

This high level of participation (considering the distance of some campuses and the administrators’ intense schedules) is notable and particularly significant given that a key project objective is to “create a regional learning community of academic leaders in northern Ohio” and “assemble the senior academic leadership of partner universities” to advance the IDEAL agenda.

(2) Satisfaction
At end of the day, Co-PI Diana Bilimoria invited participants to complete an evaluation that was designed by the IDEAL team. Responses were collected and tabulated by Project Director Amanda Shaffer. There were 47 responses, nearly half (45%) of which were submitted from those who identified themselves as working with the grant over the past year on a change team, as a change leader, co-director or coach. One quarter (25%) were submitted by those who reported that they were administrators internal to the six participating universities (but not also as a direct member on the change teams).
Plenary Conference participants rated the event’s overall effectiveness quite highly (M=3.6, with 3=good and 4=excellent) (Table 1). Participants reported that the sessions provided helpful insights (M=3.7), strategies (M=3.6) and opportunities to meet others (M=3.4). In comparison to last year, the evaluation of the keynote speakers was lower (M=3.3, compared to 3.6 in 2010). However, the rating for useful strategies was higher at this conference (M=3.6 in 2011 and M=3.3 last year), likely because of the later stages of the change teams, or as one respondent noted, “the Year 2 presentations were far more developed and mature than Year 1.” The overall rating was identical for both 2010 and 2011, an average of 3.6.

Table 1: Evaluation Scores for All Respondents  (N=47)
(Scale of 1-4, where 1=poor, 2=fair, 3=good, 4=excellent)

<table>
<thead>
<tr>
<th></th>
<th>MEAN</th>
<th>% Excellent</th>
<th>% Good</th>
<th>% Fair</th>
<th>% Poor</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overall</td>
<td>3.6</td>
<td>59</td>
<td>39</td>
<td>2</td>
<td>0</td>
</tr>
<tr>
<td>Insights</td>
<td>3.7</td>
<td>75</td>
<td>23</td>
<td>2</td>
<td>0</td>
</tr>
<tr>
<td>Strategies</td>
<td>3.6</td>
<td>63</td>
<td>30</td>
<td>7</td>
<td>0</td>
</tr>
<tr>
<td>Meet</td>
<td>3.4</td>
<td>60</td>
<td>26</td>
<td>15</td>
<td>0</td>
</tr>
<tr>
<td>Speakers</td>
<td>3.3</td>
<td>43</td>
<td>45</td>
<td>13</td>
<td>0</td>
</tr>
</tbody>
</table>

Analyses by role, or comparisons of reported change team members and participants not serving on change teams but internal to the six IDEAL universities (e.g., provosts, deans, and diversity officers), are presented in Table 2. These comparisons suggest that conference ratings were quite similar for all types of respondents.

Table 2: Evaluation Responses, by Role (N=47)
(Scale of 1-4, where 1=poor, 2=fair, 3=good, 4=excellent)

<table>
<thead>
<tr>
<th></th>
<th>CHANGE TEAMS (n=21)</th>
<th>Admin (n=12)</th>
<th>Role Blank (n=12)</th>
<th>Other (n=2)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overall</td>
<td>3.5</td>
<td>3.6</td>
<td>3.6</td>
<td>4.0</td>
</tr>
<tr>
<td>Insights</td>
<td>3.7</td>
<td>3.8</td>
<td>3.5</td>
<td>4.0</td>
</tr>
<tr>
<td>Strategies</td>
<td>3.6</td>
<td>3.6</td>
<td>3.5</td>
<td>4.0</td>
</tr>
<tr>
<td>Meet</td>
<td>3.5</td>
<td>3.4</td>
<td>3.5</td>
<td>3.5</td>
</tr>
<tr>
<td>Speakers</td>
<td>3.3</td>
<td>3.3</td>
<td>3.2</td>
<td>4.0</td>
</tr>
</tbody>
</table>

Reflecting on suggestions for improvement and for future conferences, 30 respondents offered ideas. The suggestions occurring most frequently were to:
1. *Allow more time for interaction and discussion* (10 comments)
   Participants sought more time for both intra- and inter-campus discussions. The latter idea is consistent with a frequently made suggestion last year, to allow for more interaction between tables.

2. *Improve keynote speakers* (5 comments)
   Some participants suggested that the keynote speakers could be more dynamic or effective. Suggestions for future conferences included a NSF program officer and a speaker who is an expert on mentoring.

3. *Incorporate more breaks* (5 comments)
   The official program contained no breaks until lunch (Appendix 2), but Co-PI/Co-Director Diana Bilimoria implemented an *ad hoc* break around 11:40 a.m. In spite of this addition, five participants sought more breaks, and in some cases, noted that the rationale was to meet those sitting at other tables.

4. *Allow for more time for the poster fair* (5 comments)
   Notably, several respondents last year suggested that the poster fair in the 2010 agenda be eliminated, perceiving that the information was duplicative of the presentations and written information. However, this year, participants suggested that given the work put into the posters, they should be highlighted more in the conference (e.g., by incorporating into presentations or integrating them into a refreshment break).

The most frequently made suggestion in 2010’s evaluation was that the event should be held in a larger space, and this year several comments praised the venue, Clark Hall at the Cleveland Botanical Gardens.

**(3) Learning**
When asked on the written evaluation, “What are your key learnings from this event?” 39 respondents described an outcome. Most frequently named ideas were the following:

1. *Specific change team initiatives learned from campus presentations* (31 responses)
   Key strategies learned included Case’s Launch initiative, BGSU’s writing club, and Akron’s retirement analysis.

2. *Approaches to institutional change* (7 responses)
   Seven respondents described learning about institutional change strategies, such as incorporating metrics into a project, working with administration, and building incrementally from previous efforts.

**(4) Application**
At the end of the day, teams were invited to discuss questions pertaining to impressions of the day and ways to advance the Year 3 change projects. Many teams expressed enthusiasm for other campuses’ projects and reported that they would “bring back” these ideas and adapt them to their own campus context. For example, Kent State change team leaders reported that they wanted to implement an initiative like BGSU’s writing club, but they would focus it by genre of writing.
Likewise, CSU discussed adapting CWRU’s launch committees to their new multidisciplinary hires. New needs were also discussed, such as for UT -- which described a desire to broaden discussions to postdoctoral scholars, graduate students and undergraduates --- and CWRU, for thinking about tailored mentoring models and evaluation of mentoring initiatives.

**References:**
APPENDIX 1: ATTENDANCE

Attendance at September 16, 2011 IDEAL Plenary Conference

IDEAL Participants (number attended/number invited)

- 2/3 IDEAL PIs and co-PIs*
- 5/6 IDEAL co-directors*
- 6/18 Year 1 change team leaders
  (0/3 BGSU, 1/3 CSU, 1/3 CWRU, 1/3 KSU, 1/3 UA, 2/3 UT)
- 20/20 Year 2 change team leaders
  (3/3 BGSU, 3/3 CSU, 4/4 CWRU, 3/3 KSU, 3/3 UA, 4/4 UT)
- 18/21 Year 3 change team leaders
  (3/3 BGSU, 3/3 CSU, 4/4 CWRU, 3/4 KSU, 2/3 UA, 3/4 UT)
- 4/5 coaches (1/1 BGSU, 1/1 CSU, 1/1 KSU, 0/1 UA & CWRU, 1/1 UT)

Attendees from participating universities, not PIs, co-directors or change team members
(number attended/number invited)

- 7/17 Presidents, Provosts, Vice Provosts & Associate Provosts (who are not co-directors nor change leaders)
  (0/2 BGSU, 1/2 CSU, 2/2 CWRU, 2/5 KSU, 1/2 UA, 1/4 UT)
- 6/20 Deans
  (1/7 BGSU, 1/3 CSU, 0/4 CWRU, 1/3 KSU, 2/2 UA, 1/1 UT)
- 7/15 Assistant and associate deans who are not co-directors nor change leaders)
  (1/3 BGSU, 1/1 CSU, 2/6 CWRU, 1/2 KSU, 1/1 UA, 1/2 UT)
- 9/16 Diversity/equity administrators
  (0/1 BGSU, 1/1 CSU, 4/6 CWRU, 1/1 KSU, 3/4 UA, 0/3 UT)

* One co-PI/co-director was encountering a serious illness.
APPENDIX 2: PLENARY CONFERENCE AGENDA

9:30 – 9:40 Opening Remarks and Introduction of IDEAL Advisory Board Members
Lynn T. Singer, PhD, Deputy Provost and Vice President for Academic Affairs, CWRU; Principal Investigator, IDEAL

9:40 – 9:45 Introduction of Keynote Speaker
W. A. “Bud” Baeslack III, PhD, Provost and Executive Vice President, CWRU

9:45 – 10:45 Keynote Address
Margaret E.M. Tolbert, PhD, Senior Advisor, Office of Integrative Activities (OIA), National Science Foundation (NSF)

10:45 – 10:50 Introduction of the Co-Directors of IDEAL’s Six Partner Universities
Diana Bilimoria, PhD, Professor of Organizational Behavior, CWRU; Co-Principal Investigator, IDEAL

10:50 – 12:20 IDEAL Year 1 Change Project Presentations
Change Leader Teams from each of IDEAL’s six partner universities

12:20 – 12:30 BREAK/LUNCH SERVED

12:30 – 1:00 Luncheon

1:00 – 1:45 Poster Session

1:45 – 2:15 Ohio Board of Regents
Stephanie Davidson, Vice Chancellor, Academic Affairs & System Integration,

2:15 – 2:30 BREAK

2:30 – 3:30 Group Discussion: Learnings from the Day, Looking to the Future
IDEAL PI, Co-PIs, and Advisory Board Members
APPENDIX THREE: IDEAL EVALUATION

1. Please evaluate today’s event on the following items:
   (Scale of 1-4, where 1=poor, 2=fair, 3=good, 4=excellent)

<table>
<thead>
<tr>
<th></th>
<th>Excellent</th>
<th>Good</th>
<th>Fair</th>
<th>Poor</th>
</tr>
</thead>
<tbody>
<tr>
<td>Provided helpful insights.</td>
<td>4</td>
<td>3</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>Provided useful strategies.</td>
<td>4</td>
<td>3</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>Provided useful opportunities to meet others.</td>
<td>4</td>
<td>3</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>Speakers were effective.</td>
<td>4</td>
<td>3</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>Overall conference effectiveness.</td>
<td>4</td>
<td>3</td>
<td>2</td>
<td>1</td>
</tr>
</tbody>
</table>

2. What are your key learnings from this event?

3. Suggestions for improvement.

4. Suggestions for future conferences.

5. For tracking purposes, please indicate your institutional role as it applies to your participation in this plenary (optional): Advisory. Assistant/Associate Dean, Coach, Change Leader, Co-Director, Dean, Department Chair, Diversity/Inclusion, President, Provost, Women’s Center/Gender Studies, Other:______