

TO: Dr. Deanne Snavely (2010-11) & Dr. Julie Barnes (2011-12), IDEAL Co-Directors for Bowling Green State University

FROM: Dr. Mary Wright, External Evaluator

APPROVED: July 2, 2010; REVISED June 22, 2011

RE: Memorandum of Understanding: Bowling Green State University Evaluation Plan for NSF IDEAL Grant

Institutional Transformation Theme: Build Intellectual Community and Collegiality
“BGSU proposes that the first year of IDEAL would be spent in identifying the specific barriers at BGSU through surveys and developing strategies for creating opportunities for collegial interactions, and subsequent years would produce further implementation processes.”

To evaluate BGSU’s engagement in the institutional transformation theme, “Build Intellectual Community and Collegiality,” Deanne Snavely and Mary Wright, with Amanda Shaffer present, discussed the following evaluation plan at Dr. Wright’s campus visit on May 17, 2010. The plan was further revised during the midway evaluation conversation (June 22, 2011), which also included Dr. Julie Barnes, IDEAL Co-Director for 2011-12. This document will confirm that Dr. Barnes will provide to Dr. Mary Wright the following data (as electronic files), no later than her second final campus visit in Spring 2012 (specific date TBD, but likely to be April 17, 2012).

(1.1) To assess the impact of university-wide events sponsored by the BGSU change team, Dr. Snavely and Dr. Barnes will track attendance and submit summarized program evaluation information for each event. (For Dr. Sandler’s May 2010 visit, when such data was not systematically collected, it is recommended that the BGSU change team detail the attendance of the Faculty Senate and send out a short online survey to these attendees.) For future events and workshops (Fall 2010-), please provide lists of faculty who attended and note their primary department, rank at the time of the event, gender and URM status. To aid in collection of evaluation data for future events, it is recommended that short feedback forms be distributed and collected at the end of events. (I would be happy to provide examples of a feedback form if you like, but possible questions could include:

- Please circle your rating of the overall value of this workshop for your work at BGSU. (with response options being a Likert scale, ranging from 1=Not at all valuable to 5=Very valuable)
- What did you expect to gain from this session?
- What aspects of the session did you find most useful?
- What might you do differently as a result of attending this event?
- Do you have any suggestions for how we could make this program more useful?)

(1.2) As an additional measures of the impact of the IDEAL search committee workshops, Dr. Barnes will track the following data for AY 2010-11 and 2011-12 in STEM departments: short lists of tenure-track faculty candidates, lists of applicants to whom offers were made, and lists of acceptances. (Dr. Barnes will provide only anonymized data to Dr. Wright, summarized by gender, race/ethnicity, and department.)

Ideally, there will be plans in place to continue this data collection effort, and use it to inform search committee policies and practices.

- (2) **As an indicator that the climate survey has been institutionalized**, there will be concrete plans for the BGSU campus to repeat the survey at a future date (e.g., 2013 or 2014), along with mechanisms that allow for faculty input about the survey process, analysis, and discussion of findings.
- (3) **To assess the impact of participation in IDEAL on the change team's perceptions of themselves as change agents**, Dr. Wright will conduct a focus group with members of change teams across the three years. In her 2012 site visit, she will ask the teams how the process of working on the IDEAL projects has/has not fostered change in how they see themselves as institutional change agents/leaders.
- (4) **For each of the three years of the IDEAL grant, please track what milestones set by the team have been met during each project year, as well as other key accomplishments**. For example, important process measures for 2009-10 would be Dr. Snavelly's indication that each the steps outlined in the Institutional Change Project Template, section 7 (Implementation Plan for Change Template), had been accomplished by Summer 2010, such as distribution of a university-wide climate survey, holding university-wide events on the discussion of Title IX, and advocacy for the Faculty Senate proposed charter change on stopping the tenure clock. Dr. Barnes will report on IDEAL goals and activities for 2011-12.

Dr. Wright will speak with Dr. Snavelly and Dr. Barnes by phone to support efforts in collecting and summarizing these data.

Additionally, to support evaluation of the IDEAL grant (across the six participating universities) and satisfy NSF reporting requirements, Dr. Snavelly or Dr. Barnes will provide to Dr. Mary Wright the following information by the time specified:

- (1) Faculty Composition Tables for AY 2009-10, 2010-11, and 2011-12 (similar to Table 3 of the original "Institutions Developing Excellence in Academic Leadership" proposal). AY 2009-10 data should be provided to Dr. Wright in electronic form, no later than June 7, 2010. AY 2010-11 and 2011-12 should be provided to Dr. Wright in electronic form no later than the time of her second NSF site visit in 2012.
- (2) At the 2012 site visit, Dr. Wright will meet again with Dr. Barnes, members of the project teams from AY 2009-12, and senior academic leaders, including the provost and dean from the College of Arts and Sciences.

TO: Dr. Diana Bilimoria, IDEAL Co-Director for Case Western Reserve University
FROM: Dr. Mary Wright, External Evaluator
DATE APPROVED: May 1, 2010; Revised: June 13, 2011
RE: Memorandum of Understanding: Case Western Reserve University Evaluation Plan for NSF IDEAL Grant

Institutional Transformation Theme: *Enhancing Collegiality and Inclusion in S&E*

“This theme solidifies and extends to other S&E departments the pilot project successfully implemented in the Case School of Engineering during ACES.”

To evaluate Case Western Reserve University’s engagement in the institutional transformation theme, “Enhancing Collegiality and Inclusion in S&E,” Diana Bilimoria and Mary Wright, with Lynn Singer present, discussed the following evaluation plan at Dr. Wright’s campus visit on April 19, 2010. This document will confirm that Dr. Diana Bilimoria will provide to Dr. Mary Wright the following data (as electronic files), no later than her second final campus visit in Spring/Summer 2012 (specific date TBD). *To support Dr. Bilimoria’s efforts in collecting and summarizing these data, Dr. Wright will meet with Dr. Bilimoria at the 2011 Plenary Conference.*

- (1) **To assess the implementation of ideas generated from each year’s change project, Dr. Wright will meet with deans from the College of Arts and Sciences, the Case School of Engineering, and the Weatherhead School of Management at her 2012 site visit.** Each dean will be asked to indicate if any “best practices” that emerge from each year’s change project report have been implemented (or recommended for implementation in the future). It is also recommended that Dr. Bilimoria and Dr. Wright discuss further how feedback from chairs could be gathered about implementation/plans for implementation of best practices recommended by IDEAL teams. (For example, possibilities are survey feedback at a future IDEAL event or having Dr. Wright meet with IDEAL chairs involved in any interventions (e.g., attendees at the 4/16/10 chairs caucus meeting) at her 2012 site visit.) 2011 note: At the June 13, 2011, phone conversation, it was decided that a small group of chairs be convened for the 2012 site visit. These chairs would be comprised of IDEAL units where there was a substantive intervention, e.g., a department in which there was an “early career launch” committee, and Dr. Wright would ask them about the impact of this intervention on the units and faculty careers, perceived strengths of the program, and suggested changes.
- (2) **To assess any changes in “collegiality and inclusion” at CWRU, data from campus-wide faculty worklife surveys will be provided.** It is recommended that survey data from two faculty surveys be provided, because the different phrasing of questions can elicit different information. The surveys that will be used for the baseline are the 2007 IDEAL climate survey and the 2009 COACHE survey, and comparison data will also be provided for 2011 or 2012. For these surveys, frequencies should be presented for women and men, and if possible, within each CWRU college/school. 2011 note: Given the lack of comparative data, and the focus of the IDEAL projects, it was decided at the June 2011 phone conversation to instead convene a small group of junior faculty during the 2012 site visit, who had been recipients of substantive IDEAL interventions, e.g., mentees. Dr. Wright would ask them about the impact of this intervention, perceived strengths of the program, and suggestions for changes.

(3) For each of the three years of the IDEAL grant, please track what milestones set by the team have been met during each project year, as well as other key accomplishments. For example, important process measures for 2009-10 would be Dr. Bilimoria's indication that each the steps outlined in the Institutional Change Project Template, section 6 (Specific Objectives and Outcomes of Change Project) and section 7 (Implementation Plan for Change Template), had been accomplished by Summer 2010 and reported out to the College of Arts and Science Deans.

Additionally, to support evaluation of the IDEAL grant (across the six participating universities) and satisfy NSF reporting requirements, Dr. Bilimoria will provide to Dr. Mary Wright the following information by the time specified:

(4) Faculty Composition and Leadership Positions Tables for AY 2009-10, 2010-11, and 2011-12 (similar to Tables 3 &7 of the original "Institutions Developing Excellence in Academic Leadership" proposal). AY 2009-10 data should be provided to Dr. Wright in electronic form, no later than May 15, 2010. AY 2010-11 and 2011-12 should be provided to Dr. Wright in electronic form no later than the time of her second NSF site visit in 2012.

(5) At the 2012 site visit, Dr. Wright will meet again with Dr. Bilimoria, members of the project teams from AY 2009-12, and senior academic leaders, including the provost and deans from the College of Arts and Sciences, the Case School of Engineering, and the Weatherhead School of Management. Discussions will focus on their perceived impact of the grant, plans for sustainability/institutionalization, and the issues describe above, in measure #1.

TO: Dr. Paul Lin, IDEAL Co-Director for Cleveland State University
FROM: Dr. Mary Wright, External Evaluator
APPROVED: April 29, 2010 (initially approved); July 7, 2010 (revised); June 13, 2011 (second revision)
RE: Memorandum of Understanding: Cleveland State University Evaluation Plan for NSF
IDEAL Grant

Institutional Transformation Theme: *Exploring Leadership by Participation*

“Encouraging Science and Engineering women and underrepresented minority faculty to self-diagnose their knowledge of leadership, and gain that knowledge by actively participating in institutional policy-making committees such as the Faculty Senate and Graduate Council.”

[2011 Note: In 2010-11, the team’s emphasis shifted to a related, but new, theme: Enhancing faculty mentoring and creating inclusive campus climate through institutional partnerships.]

To evaluate Cleveland State University’s engagement in the institutional transformation theme, “Exploring Leadership by Participation,”* Paul Lin and Mary Wright, with Amanda Shaffer present, discussed the following evaluation plan at Dr. Wright’s campus visit on April 20, 2010. This document will confirm that Dr. Paul Lin will provide to Dr. Mary Wright the following data (as electronic files), no later than her second final campus visit in Spring/Summer 2012 (specific date TBD). *To support Dr. Lin’s efforts in collecting and summarizing these data, Dr. Wright will meet with Dr. Lin at the 2011 Plenary Conference.*

1. **To assess the composition of academic leadership patterns over the span of the IDEAL Grant, for AY 2009-10, 2010-11, and 2011-12, Dr. Lin will provide tables on the distributions of faculty in academic leadership positions in the 11 IDEAL departments and university-wide.** Specifically, positions tracked should include full professors, endowed chairs, department chairs, deans, and associate deans, as well as the CSU President, Provost, and Vice, Associate, and Deputy Provosts (or their reasonable equivalent title). For each of these positions, frequencies for the total number of persons in the position, the total number of women, and the total number of Underrepresented Minorities (URM) should be provided (similar to the format used in Table 7 of the original “Institutions Developing Excellence in Academic Leadership” proposal).
2. **To assess the composition of service leadership patterns over the span of the IDEAL Grant, for AY 2009-10, 2010-11, and 2011-12, Dr. Lin will send information about the representation of faculty on the following committees, with figures for the total number of faculty serving in these roles, noting the number of female faculty, and the number of URM faculty as well:**
 - *CSU Faculty Senate: Please track president, vice president and secretary, as well as the elected (voting) faculty members.
 - *CSU Faculty Senate Academic Standing Committee: Please track the Chair as well as all the committee members.
 - *CSU Graduate Council: Please track the Chair.
 - *CSU University Curriculum Committee: Please track the Chair.
 - *CSU University Peer Review Committee: Please track the Chair.
 - *CSU University Faculty Affairs Committee: Please track the Chair.
 - *The Fenn College of Engineering Peer Review Committee for Promotion and Tenure: Please track the Chair.
 - *The College of Science Peer Review Committee for Promotion and Tenure: Please track the Chair.It would be helpful to have these data organized in similar fashion to the academic leadership tables, if possible.

3. **For each time the leadership course is offered (between Fall 2010 and Spring 2012 [2011 Note: Changed to 2010]), please track participation in the course, by term.** For each term, please provide lists of faculty who regularly participated and note their primary department, rank at the time of the course, gender and URM status.
4. **For each time the leadership course is offered (between Fall 2009 and Spring 2012 [2011 Note: Changed to 2010]), distribute, collect and summarize a feedback survey to participants.** * At the April 20, 2010 meeting at CSU with Dr. Lin, it was recommended that the survey include questions that would assess participants' perceptions of the strengths of the course, their suggestions regarding structure and content, the perceived change in the level of interest the participant had in a CSU leadership position due to course participation, how the participant planned to utilize what s/he learned in the course, and if/how they would recommend the course to another CSU faculty member. Dr. Wright also volunteered to review a draft of this feedback survey, prior to its distribution in Spring 2010.
5. **For seminars offered by IDEAL (alone or in collaboration with other campus units), from April 2011-April 2012,** please provide numbers of attendees, overall and broken down by department, gender, and rank at the time of the event(s) (based on sign-in sheets). Please also summarize (anonymous) evaluation data from event(s), based on post-session feedback. It is also recommended that the IDEAL team gather data on reported usefulness of the session for work at CSU (e.g., "What aspects of the session did you find most useful for your work at CSU?"), in order to document individual/institutional impact of these programs to aid in institutionalization efforts. Finally, it is highly recommended that the feedback form also collect formative feedback, to enable the team to enhance future seminar series (e.g., "Do you have any suggestions for how we could make this program more useful?")
6. **For each of the three years of the IDEAL grant, please track what milestones set by the team have been met during each project year, as well as other key accomplishments.** For example, important process measures for 2009-10 would be Dr. Lin's indication that each the steps outlined in the Institutional Change Project Template, section 7 (Implementation Plan for Change Template), had been accomplished by Summer 2010 and reported out to key administrators (e.g., college deans).

Additionally, to support evaluation of the IDEAL grant (across the six participating universities) and satisfy NSF reporting requirements, Dr. Lin will provide to Dr. Mary Wright the following information by the time specified:

(1) Faculty Composition Tables for AY 2009-10, 2010-11, and 2011-12 (similar to Table 3 of the original "Institutions Developing Excellence in Academic Leadership" proposal). AY 2009-10 data should be provided to Dr. Wright in electronic form, no later than May 15, 2010. AY 2010-11 and 2011-12 should be provided to Dr. Wright in electronic form no later than the time of her second NSF site visit in 2012.

* 2011 Note: At the May 10, 2011, phone conversation, Dr. Lin indicated that feedback forms were distributed, but no one turned in the form. However, he indicated that a few participants emailed the instructor their comments, which were all positive, and all indicated that they would recommend the program to their colleagues. Under this circumstance, Dr. Lin recommended that the program's success can best be gauged by the increased participation of women and underrepresented minority faculty from Spring 2010 to Fall 2010 (i.e., metric #3).

(2) At the 2012 site visit, Dr. Wright will meet again with Dr. Lin, members of the project teams from AY 2009-12, and senior academic leaders, including the provost and deans from the Fenn College of Engineering and the College of Science.

TO: Dr. Mary Lou Holly, IDEAL Co-Director for Kent State University
FROM: Dr. Mary Wright, External Evaluator
DATE APPROVED: July 26, 2010
RE: Memorandum of Understanding: Kent State University Evaluation Plan for NSF IDEAL Grant

Institutional Transformation Theme: *Enhancing the Climate for Scholarly and Collegial Community in the College of Arts and Sciences*

“KSU will build on the findings of its Women in Science Working Group Report and select annual change projects from the projects identified therein.”

To evaluate KSU’s engagement in the institutional transformation theme, “Enhancing the Climate for Scholarly and Collegial Community in the College of Arts and Sciences,” Mary Lou Holly and Mary Wright, with Amanda Shaffer present, discussed the following evaluation plan at Dr. Wright’s campus visit on May 24, 2010. Given KSU’s emphasis on “climate,” this evaluation plan will measure changes through a number of indicators that have been identified as important constituents of climate: structural diversity (i.e., NSF indicator data), psychological climate (i.e., findings from IDEAL/KSU climate survey) and behavior/social interaction (i.e., opportunities for faculty to interact around and for gender/URM equity) (Hurtado, Milem, Clayton-Pedersen & Allen, 1999). This document will confirm that Dr. Holly will provide to Dr. Wright the following data (as electronic files), no later than her second final campus visit in Spring/Summer 2012 (specific date TBD).

(1.1) **As an indicator that the climate survey has been institutionalized, the climate survey should be repeated in 2012, preferably through a KSU office such as the Division of Diversity, Equity and Inclusion.** As a measure of faculty “buy-in,” the response rates also will be measured. Dr. Holly will provide to Dr. Wright the response rates for these surveys, for the College of Arts and Sciences (2010 and 2012) and the College of Technology (2012).

(1.2) **To assess any changes related to the campus theme, “Enhancing the Climate for Scholarly and Collegial Community in the College of Arts and Sciences,” responses to select questions on the climate survey will be compared for 2010 and 2012.**

Please indicate how satisfied you are with each of the following in regards to your professional life:

[Section 5] Overall Experience:

- (a) Overall experience of community at Kent State University
- (b) Overall experience of collegiality in your primary department
- (c) Overall work environment
- (d) Opportunities to collaborate with faculty in your primary department*

To this end, for both 2010 and 2012, Dr. Holly (or her associates) will provide overall frequencies for these five items for College of Arts and Science/Technology respondents,

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- Given 2009-10 change team’s desire for greater cross-university collaboration, it may also be helpful to add an item on the 2012 survey about “Opportunities to collaborate with faculty *outside of* your primary department.” Of course, this would not allow for comparison from the 2010-2012 surveys, but it would be a helpful metric moving forward.

broken down by gender & URM status (overall and within each rank). If these questions change with the institutionalization of the climate survey (see 1.1), comparable items may be used, but changes should be noted.

- (2.1) **As an indicator that the KSU change teams will have made efforts to promote a “scholarly and collegial community,” the IDEAL project will sponsor at least one event to bring together College of Arts and Sciences & College of Technology faculty (or KSU faculty generally), on a topic pertaining to gender/URM equity in STEM.** (Possibilities discussed during the 2010 site visit were an Association for Women in Science-sponsored speaker and a collaboration with other IDEAL campuses to bring in Bernice Sandler. However, the current change team’s engagement with the climate survey may certainly suggest other topics and possibilities.) It is recommended that the event(s) also be opened to graduate student participants, given 2010 change team members’ and key administrators’ interests in future faculty initiatives.
- (2.2) **To assess the impact of the event(s) sponsored by the KSU change team, Dr. Holly will track attendance and submit summarized program evaluation information for each event.** Please provide numbers of attendees, overall and broken down by primary department, rank at the time of the event(s), gender and URM status. Please also summarize (anonymously and in the aggregate) evaluation data from event(s), based on feedback about participants’ satisfaction, sense of value for their work at KSU, and prospective changes in behavior (e.g., What might you do differently as a result of attending this event?). (I would be happy to provide examples of a feedback form if you like, but you are also welcome to utilize one you already have.)
- (5) **For each of the three years of the IDEAL grant, please track what milestones set by the team have been met during each project year, as well as other key accomplishments.** For example, important process measures for 2009-10 would be Dr. Holly’s indication that each the steps outlined in the Institutional Change Project Template, section 7 (Implementation Plan for Change Template), had been accomplished by Summer 2010, such as administration of a climate survey, website and chair handbook development, and meetings with key administrators to report out climate survey findings and implications.

Dr. Wright will meet with Dr. Holly at the 2011 Plenary Conference to support her efforts in collecting and summarizing these data.

Additionally, to support evaluation of the IDEAL grant (across the six participating universities) and satisfy NSF reporting requirements, Dr. Holly will provide to Dr. Mary Wright the following information by the time specified:

- (1) **Faculty Composition Tables for AY 2009-10, 2010-11, and 2011-12** (similar to Table 3 of the original “Institutions Developing Excellence in Academic Leadership” proposal). AY 2009-10 data should be provided to Dr. Wright in electronic form, no later than June 11, 2010. AY 2010-11 and 2011-12 should be provided to Dr. Wright in electronic form no later than the time of her second NSF site visit in 2012.

If the change teams collect other indicator data (e.g., on retention and promotion), please provide these as well, by the time of the final NSF site visit in 2012.

(2) **At the 2012 site visit, Dr. Wright will meet again** with Dr. Holly, members of the project teams from AY 2009-12, and senior academic leaders, including the provost and deans from the College of Arts and Sciences and College of Technology.

Reference: Hurtado, S., Milem, J., Clayton-Pedersen, A., & Allen, W. (1999). *Enacting diverse learning environments: Improving the climate for racial/ethnic diversity in higher education*. ASHE-ERIC Higher Education Report, Vol. 26, No. 8.

TO: Dr. Helen Qammar, IDEAL Co-Director for University of Akron and Co-PI
FROM: Dr. Mary Wright, External Evaluator
APPROVED: June 18, 2010 (Revised: June 7, 2011)
RE: Memorandum of Understanding: University of Akron Evaluation Plan for NSF IDEAL Grant

Institutional Transformation Theme: Faculty Hiring That Makes a Difference

“UA proposes a transformational theme to redesign faculty recruitment and hiring practices. Faculty leadership skills will be essential to encourage departmental faculty to scrutinize current practices and gain an enhanced appreciation of the importance of diversity hiring for student success. IDEAL participants will work closely with UA’s Diversity Council to facilitate implementation.”

To evaluate UA’s engagement in the institutional transformation theme, “Faculty Hiring That Makes a Difference,” Helen Qammar and Mary Wright, with Amanda Shaffer present, discussed the following evaluation plan at Dr. Wright’s campus visit on May 25, 2010. This document will confirm that Dr. Qammar will provide to Dr. Wright the following data (as electronic files), no later than her second final campus visit in Spring/Summer 2012 (specific date TBD).

(1) To assess the impact of the change teams’ interventions on faculty hiring processes:

- (1A.) Search plans from the eleven IDEAL departments will be analyzed for 2007-10 AYS (baseline), 2010-11 AY and 2011-12 AY. The 2010-12 analyses should replicate the process utilized by Dr. Linda Subich for 2007-10, which includes an analysis of language utilized in job advertisements, outlets used to post positions, the demographic composition of search committees, and the outcomes of the search. The report provided in 2012 will summarize this analysis, noting where UA IDEAL department search plans have changed over the period of the IDEAL grant, as well as where there are no indications of change. It is also recommended that post-search interviews with search committee chairs be continued throughout the term of the IDEAL grant, in order to understand the reasons for change/lack of change, and if collected, these observations should be noted in the analysis as well.
- (1B.) NSF indicator data on the number of faculty hired in IDEAL departments, by rank, gender and URM status, will be provided for AY 2009-10, 2010-11 and 2011-12.

(2) As an indicator that elements of the UA IDEAL project have been institutionalized, by the time of the 2012 site visit, the following processes will be in place:

- UA’s Office of Human Resources will require a workshop for search committees, with substantial diversity content, about which IDEAL change teams have provided input. (Although not required as an indicator of institutionalization, it is additionally recommended that for meetings with STEM committees, IDEAL change team members be co-facilitators of the workshop.)
 - [Added in 2011: Alternately, if the IDEAL team is not able to institutionalize the workshop in the Office of Human Resources, it will instead offer 11 faculty workshops (1 per IDEAL department) and 2 chair workshops (1 per IDEAL school) by May 2012. At these events, attendance will be tracked (by department and rank), and feedback will be collected. For the final site visit in May 2012, Dr. Qammar will submit this summarized program evaluation information for each event.]
- UA’s Office of Human Resources will have a database of search plans, which can be analyzed by unit and accessed by the UA community.
- UA’s Office of Institutional Research will regularly collect NSF indicator data on:

- the distribution of science and engineering faculty by gender, URM status, rank, and department.
 - the distribution of leadership positions, by gender and URM status
 - recruitment and advancement processes, by gender and URM status
 - The indicator data (see previous bullet) will regularly be disseminated, such as part of an annual reporting process through the Office of Inclusion and Equity [2011: or, preferably, through the Office of the Provost].
- (3) To assess the reported impact of participation in IDEAL on the change teams' behaviors, Dr. Wright will conduct a focus group with members of change teams across the three years. As part of her 2012 site visit, she will ask them about who they talked to and influenced as part of the IDEAL process.
- (4) For each of the three years of the IDEAL grant, please track what milestones set by the team have been met during each project year, as well as other key accomplishments. For example, important process measures for 2009-10 would be Dr. Qammar's indication that each the steps outlined in the Institutional Change Project Template, section 7 (Implementation Plan for Change Template), had been accomplished by the end of Summer 2010, such as a review of search plans in IDEAL departments, interviews with search committee chairs, and a website with best practices for search committees.

Dr. Wright will talk by phone with Dr. Qammar in June 2011 to support her efforts in collecting and summarizing these data.

Additionally, to support evaluation of the IDEAL grant (across the six participating universities) and satisfy NSF reporting requirements, Dr. Qammar will provide to Dr. Mary Wright the following information by the time specified:

- (1) Faculty Composition Tables for AY 2009-10, 2010-11, and 2011-12 (similar to Table 3 of the original "Institutions Developing Excellence in Academic Leadership" proposal). AY 2009-10 data has already been provided to Dr. Wright. AY 2010-11 and 2011-12 should be provided to Dr. Wright in electronic form no later than the time of her second NSF site visit in 2012.
- (2) At the 2012 site visit, Dr. Wright will meet again with Dr. Qammar, members of the project teams from AY 2009-12, and key academic leaders, including the provost, the head of the Office of Human Resources, and deans from the Colleges of Arts and Sciences and Engineering.

TO: Dr. Penny Poplin Gosetti, IDEAL Co-Director for the University of Toledo
FROM: Dr. Mary Wright, External Evaluator
DATE APPROVED: July 8, 2010
RE: Memorandum of Understanding: University of Toledo Evaluation Plan for NSF IDEAL Grant

Institutional Transformation Theme: *Creating a Climate for Successful Retention, Tenure and Promotion*

"Identify climate and culture factors that contribute to low rates of retention and advancement for women and underrepresented minorities in engineering and the natural sciences and develop and implement transformation strategies to create a climate of support and success."

To evaluate UT's engagement in the institutional transformation theme, "Creating a climate for successful retention, tenure and promotion," Penny Poplin Gosetti and Mary Wright, with Amanda Shaffer present, discussed the following evaluation plan at Dr. Wright's campus visit on May 19, 2010. This document will confirm that Dr. Gosetti will provide to Dr. Wright the following data (as electronic files), no later than her second final campus visit in Spring/Summer 2012 (specific date TBD).

(1.1) **As an indicator that the climate survey has been institutionalized, the climate survey should be repeated in 2012.** As a measure of campus "buy-in," the response rate will be measured and compared to the response rate in the 2010 implementation. Dr. Gosetti will provide to Dr. Wright the 2010 and 2012 response rates for both surveys, overall and by IDEAL units (i.e., for "Arts and Sciences – Math and Natural Sciences," for Engineering, and for Medicine). A third measure that will signal institutionalization includes the establishment of a regular and public dissemination of climate survey findings. (Possibilities discussed include the establishment of an annual reporting to the Faculty Senate or Board of Trustees, but Dr. Gosetti and her team are free to select the reporting option most appropriate to UT's culture.)

(1.2) **To assess any changes related to the campus theme, "Creating a climate for successful retention, tenure and promotion," responses to select questions on the climate survey will be compared for 2010 and 2012:**

Please indicate how satisfied you are with each of the following in regards to your professional life:

- (a) Overall experience of community at UT
- (b) Overall experience of collegiality in your primary unit
- (c) Overall experience of being a faculty member in your primary unit
- (d) Mentoring you have received in your primary unit
- (e) Mentoring you have received in within the university

To this end, for both 2010 and 2012, Dr. Gosetti (or her associates) will provide overall frequencies for these five items, frequencies broken down by gender & URM status (overall), as well frequencies broken down by gender & URM status for IDEAL units only (i.e., for responses

associated with “Arts and Sciences – Math and Natural Sciences,” Engineering and Medicine).

- (2.1) **For each of the three years of the IDEAL grant, please track what milestones set by the team have been met during each project year, both metrics and accomplishments.** For example, important process measures for 2009-10 would be Dr. Gosetti’s indication that each the steps outlined in the Institutional Change Project Template, section 7 (Implementation Plan for Change Template) and 9 (Evaluation Metrics for Change Project), had been accomplished by September 2010, such as distribution of a university-wide climate survey with at least a 20% response rate, identification of the change leader team of at least one initiative resulting from the findings, and meetings to report the findings to University leadership (e.g., Dean McClelland) and faculty (both before and during the September 2010 Plenary Conference).
- (3) **Given that information dissemination was a greatly desired outcome of the IDEAL initiatives (among both change leaders and administrators), it is recommended that the development of an IDEAL website be developed in the near future,** which could be easily accessed by UT faculty. This site could share select climate survey findings, useful resources for faculty (e.g., the inventory of women’s programs), and IDEAL initiatives.

Dr. Wright will meet with Dr. Gosetti at the 2011 Plenary Conference to support her efforts in collecting and summarizing these data.

Additionally, to support evaluation of the IDEAL grant (across the six participating universities) and satisfy NSF reporting requirements, Dr. Gosetti will provide to Dr. Mary Wright the following information by the time specified:

- (1) **Faculty Composition Tables for AY 2009-10, 2010-11, and 2011-12** (similar to Table 3 of the original “Institutions Developing Excellence in Academic Leadership” proposal). AY 2009-10 data should be provided to Dr. Wright in electronic form, no later than June 7, 2010. AY 2010-11 and 2011-12 should be provided to Dr. Wright in electronic form no later than the time of her second NSF site visit in 2012.
- (2) **At the 2012 site visit, Dr. Wright will meet again** with Dr. Gosetti, members of the project teams from AY 2009-12, and senior academic leaders, including the provost and deans from the IDEAL colleges.