Picking Pilot Projects

When “purposes” and “projects” are advanced in campus-wide conversations, what criteria might be applied when, in spring of 2016, pilot projects will be selected for implementation in fall 2016? Thinking about a rubric for evaluating options may help to bring projects into focus.

Ross Humer introduces a draft rubric (appended here) for evaluating proposed clusters and projects. He proposed three dimensions be used: internal alignment, external alignment, and potential ….

Comments:

Where are we going with clusters? What are the intended results and outcomes? (More to be shared at the campus meetings this week and next.)

The rubric assumes that each cluster has a crisp, clear description of scope that answers the questions what and why. This leaves the questions of who, how, where, when to be answered by the projects proposed for each cluster. (see Appendix)

Discussion on Rubric: needs to be used after clusters are defined; this rubric is a first assessment. Other assessments with different questions will be needed; the overall process should incorporate “gates” for decision-making.

PSU has fiscal issues impacting cluster selection. Intellectual Property (from cluster activities) has revenue potential for PSU and individuals

What is the process to define and select clusters?

Should the cluster development process be led by the colleges (versus collaboration)? If not, what is the process?

Are industry best practices adaptable to academia?
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Practices that Support Campus-Wide Collaboration
The timetable for PSU’s transition to clusters/open labs is that by the end of fall semester 2015, the names/themes of four to six clusters will come into focus. Over the next seven days, what best practices might CoBA faculty identify that could be shared in the campus-wide discussions to support campus-wide collaboration this semester?

What is the process to define and select clusters?

Should the cluster development process be led by the colleges (versus collaboration)? If not, what is the process?

Inclusiveness of other colleges might not be an important requirement (for the process)

We should get many ideas on the table before we define clusters (PSU-wide); unbounded discussions on the potential (they apply the rubric to collect data). Could “speed dating” be a model for generating ideas and engaging multiple perspectives around problems?

An idea shared after the forum is for Heritage Hall to be set-up with tables around the parameter of the meeting room. Smaller, round tables could be set-up in the center.

The parameter tables are for departments/colleges would be manned by faculty with interests in clusters. People with ideas they want to share with other departments/colleges could walk to at table, initiate a conversation, and if the parties see potential in the idea, move the conversation to a center round table. They would put up a sign with key words to describe the core idea. Others interested in that idea could join them.

We will align as individuals to clusters of our choosing; faculty members can self-select. Clusters are not designated to departments.

The Cluster process has a very short time-line

Champions from across the PSU faculty should meet and collaborate on cluster ideation (“speed dating”) in a non-threatening collaborative environment

Who are the right contacts to discuss cluster ideas and develop them?

When people have ideas about projects or potential partners, to whom or by what process are those ideas collected and shared?

How do we avoid “topic creep” and keep the cluster definitions well focused?

Mini-poster sessions can be used as a way to grow and develop cluster ideas
Learning How Other Universities Operationalize Clusters and Open Labs
What might be learned in the next seven days by investigating the how clusters are operationalized at other universities? In particular,

- how do cluster projects and open labs fit into the existing workload structure of teaching, research, and service, and
- how do students earn credits toward their degrees by participation (elective or required) in open labs?

*What are the implications of clusters w/r/t hiring, tenure, research and applications?*

*What is the risk if individuals do not have personal involvement in clusters?*

*SUNY-Albany has 4 clusters; NY State is investing and giving tax breaks to companies that join the clusters*

*Faculty and staff are busy doing the day jobs; how can we find time for the cluster initiatives?*

Emerging Ideas on Projects and Partners that Point to Cluster Themes
What ideas for cluster projects and cluster partners are emerging among CoBA faculty members? Over the next seven days, what ideas for projects and partnership might be generated by brainstorming with CoBA colleagues or colleagues across the campus? What themes may emerge from these project/partner ideas that might frame clusters?

*Are the current cluster names “cast in bronze”? (No) Cluster names do not currently contain business terms and they should. When will be they be identified? (end of this semester)*

*The names chosen for the clusters is very important*

*Innovation and entrepreneurial activity will be critical to all clusters*

*Business should be in the name of one of the clusters*

*There is a notable lack of leadership in addressing open questions on the cluster initiative*

*The high level of uncertainty creates an opportunity (for CoBA)*

*CoBA needs to propose what we want to do in terms of creating a cluster*

*PSU needs to take advantage of its attractive location to make money; it is a magnet for tourists*

Keeping Student Needs in Focus as Open Labs are Envisioned
Engaged learning experiences are incorporated into a number of CoBA courses. Projects initiated by CoBA student organizations may have some similarities to open labs. CoBA faculty are engaged in initiatives with outside partners, some of these initiatives involve students. Might an inventory be made
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of these “open lab-like” experiences? From what has been learned about the experiences students have in these formats, what should be shared in campus-wide discussions to keep a focus on student needs as “open labs” are envisioned?

How will clusters enhance the learning experience of the students?

How do “engaged learning” concepts practiced in CoBA apply to Open Labs?

Collaborative skills need to be developed

MAPS and Enactus are examples of “engaged learning”; how are these best integrated or aligned to clusters?

(Open Labs) internships need faculty support to reinvigorate and sustain activities

How do students benefit? They must pay for academic credits; they can be paid by companies (e.g., non-profits)
Appendix: Cluster Evaluation Analytic Rubric

Prepared and Presented by Ross Humer

Analytic Rubric & Data Gathering

To be clear, the purpose of any analytic rubric is to provide insightful analysis into the strategic decision making process. It is never the substitute for informed judgment and experience but can provide important data that enable such decisions to be successful.

The execution of capturing data for the rubric is an important consideration. It is assumed that a questionnaire approach will be executed to collect both quantitative assessments of attributes and supporting qualitative insights. The scope of the population to be surveyed is a key decision that impacts the utility of the information and the work associated with analysis and compilation. The argument for a broad distribution is supported by the “wisdom of the crowds” where large populations typically create judgements that are superior to a smaller group of experts. Whatever approach is executed, the construction of the survey vehicle and attendant post-survey efforts should be tailored to the desired outcome.

As with most surveys, the topics will have a variety of familiarity with the recipients. To ensure the optimal utility of the effort, it is essential, especially with a new concept such as Clusters, that the documentation be structured to provide sufficient information to created informed responses.

To that point, a preface of the definition of Clusters should be provided. For each of the Cluster Options to be rated, a crisp definition of each must be provided, describing the “what” and “why” of potentially creating the specific cluster. The “who”, “how”, “where”, and “when” aspects are not appropriate for the survey instrument but must be defined in later stages of strategic option development.

The survey instrument ideally will have 2 major components: a 5 point Likert survey question (to capture data for analysis) and a commentary field to capture specific insights from the responder. In the discussion below, it is assumed that both fields will be created in the questionnaire to capture both quantitative and supporting qualitative insights.

Cluster Evaluation Rubric Outline

While there are a number of options available for the higher level definition of the rubric, it is proposed that three general categories be used to formulate questions and aggregate data:

Internal Alignment – the degree to which the cluster conforms to the University’s current capabilities, interests, and activities
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**External Alignment** – the degree to which the cluster matches the current and future needs of external stakeholders, participants, and partners

**Developmental Potential** – the degree to which the Cluster, once fully developed and operational, creates a desirable and scalable resources fulfilling an important niche and providing scalability
Internal Alignment Section

Topical Prompt: PSU has the necessary Skills to create this cluster
Likert Range Comments: Strongly Disagree – Strongly Agree
Comment Prompt: What are the specific skills PSU has that address this cluster?

Topical Prompt: PSU has the necessary Capabilities to develop this cluster
Likert Range Comments: Strongly Disagree – Strongly Agree
Comment Prompt: What are PSU’s major strengths and gaps?

Topical Prompt: PSU has a strong interest in this Cluster area
Likert Range Comments: Strongly Disagree – Strongly Agree
Comment Prompt: What are prior experiences relevant to this Cluster?

Topical Prompt: PSU has demonstrated capabilities related to this cluster
Likert Range Comments: Strongly Disagree – Strongly Agree
Comment Prompt: What are examples of prior successes?

External Alignment Section

Topical Prompt: PSU has strong stakeholder interest in developing this Cluster
Likert Range Comments: Strongly Disagree – Strongly Agree
Comment Prompt: Which stakeholder have expressed what favorable interest in this Cluster?

Topical Prompt: PSU has existing or potential Partners to engage in Cluster Development
Likert Range Comments: Strongly Disagree – Strongly Agree
Comment Prompt: Which existing partners have interest? Which potential partners have interest?

Topical Prompt: PSU has existing or potential beneficiaries that are interested in this cluster
Likert Range Comments: Strongly Disagree – Strongly Agree
Comment Prompt: Which existing or potential beneficiaries have expressed interest?

Development Potential Section

Topical Prompt: There is long term potential for PSU to create unique value & notoriety in this Cluster
Likert Range Comments: Strongly Disagree – Strongly Agree

Comment Prompt: What existing institutions are active and successful in this area?

Topical Prompt: There are funding sources available to fully develop this cluster’s potential
Likert Range Comments: Strongly Disagree – Strongly Agree
Comment Prompt: What are the funding sources that could be accessed?

Topical Prompt: There is a definite path for PSU to create differentiation in this Cluster Area
Likert Range Comments: Strongly Disagree – Strongly Agree
Comment Prompt: What are the specific types of meaningful differentiation available?

Topical Prompt: This is an area where the Cluster can be developed into a sustainable program
Likert Range Comments: Strongly Disagree – Strongly Agree
Comment Prompt: What are the elements of the cluster needed to become sustainable?

Topical Prompt: The impact of this Cluster can be scaled from local value to global prominence
Likert Range Comments: Strongly Disagree – Strongly Agree
Comment Prompt: What specific elements of the cluster are important beyond local significance?