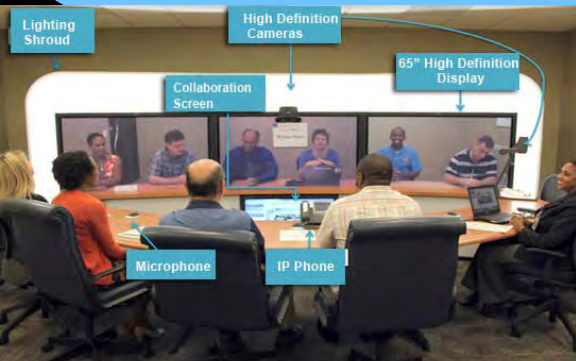


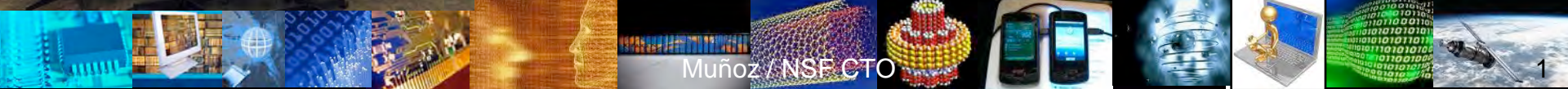


Virtual Meetings

VIRTUAL Meetings At NSF



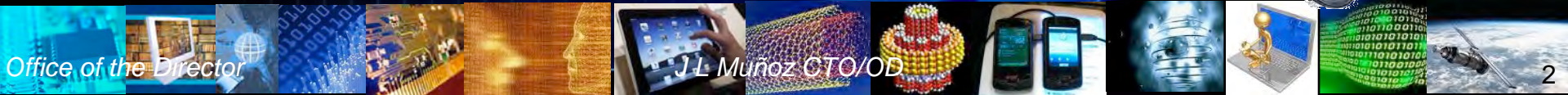
November 2012
José L. Muñoz
Chief Technology Officer
jmunoz@nsf.gov





UP-FRONT!!

- ❖ NSF's merit review quality, confidentiality and integrity shall not be compromised
- ❖ Face-to-face panels **WILL NOT** be replaced by virtual panels!!
 - balance virtual panels and F-to-F as necessary to meet budget realities and community needs
- ❖ No One-Size-Fits all virtual panel technology policy
- ❖ Making suggestions, not requirements
- ❖ Virtual Panels ≠ Virtual Meetings





Virtual Panel Task Force

- ❖ Muñoz, José
- ❖ Aronson, Dorothy
- ❖ Bennett, Keith
- ❖ Feldman, Jean
- ❖ Figueroa, Juan*
- ❖ Major, Candace
- ❖ Meacham, Steve
- ❖ Perez, Paul
- ❖ Powell, Matt
- ❖ Rich, Jeffrey
- ❖ Rohlfing, Celeste
- ❖ Roskoski, Joann
- ❖ Scholar, Sandra

CTO/Lead

DIS

MPS

Policy

ENG

GEO

OIA

DAS

OGC

OIRM

MPS

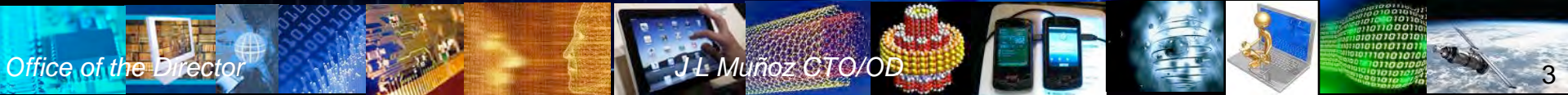
BIO

OGC



Dr. Wanda Ward
 Dr. Cliff Gabriel
 Mr. Gene Hubbard

* new





Virtual Panel Champions

❖ Volunteered representatives from 9 Directorates/Offices

IT Specialists, Administrative Professionals and Program Officers



❖ Voluntary participation on several efforts

- Identify candidate virtual technologies to facilitate virtual panels in a pilot mode
- Test candidate technologies among the group before moving into the pilot phase
- Identify panels for possible pilots of pre-tested candidate technologies
- Review training material, best practice documents and ad hoc tip sheets
- Advocate for reviewer/moderator completion of surveys and act as points of contact for obtaining survey result





Virtual Participation: Motivation

❖ Broadening Participation

- expands pool of potential panelists
 - home bound
 - travel/time restrictions
 - under-represented
 - more effective use of time
- possible use as a training mechanism
- especially beneficial for international panelists



❖ Cost

- Savings of \$1600/panelist over in-person
- Additional benefit when using presenters





Advantages

- ❖ Broaden participation pool
- ❖ Cost savings
- ❖ Reduced reviewer burden
- ❖ Opportunity for more flexible review formats
 - ❖ Virtual panels are GREEN
 - ❖ New, novel, way for interaction for some
 - ❖ Potential to invite input from experts
 - especially true for virtual meetings





Panel Factoids

- ❖ NSF in FY11 had 1% virtual panels
- ❖ In FY11 it costs NSF \$38M for face-to-face panels
 - direct non-salary costs
- ❖ FY11 26% of F2F panels had fewer than 6 panelists
- ❖ FY11 49.2% of panels considered less than 16 props
- ❖ Savings of \$2M for FY12

| | Virtual | Mixed | In-person | TOTAL |
|---------------------|---------|-------|-----------|--------|
| Panels | 42 | 302 | 1,605 | 1,949 |
| Proposals | 443 | 7,825 | 36,698 | 44,966 |
| % of total | 0.99 | 17.40 | 81.61 | 100 |
| Props/panel | 10.55 | 25.91 | 22.86 | 23.07 |
| Panelists | 245 | 3,160 | 15,460 | 18,865 |
| Panelists/Panel | 5.83 | 10.46 | 9.63 | 9.68 |
| Proposals/panelists | 1.81 | 2.48 | 2.37 | 2.38 |





Virtual Participation @ NSF

❖ FY12 virtual participation results

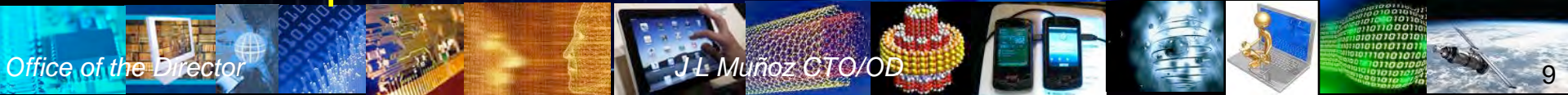
| Mtg Type | Wholly | Non-virtual | Total | % Wholly |
|-------------|--------|-------------|-------|----------|
| Panels | 153 | 1451 | 1604 | 9.5% |
| Adv Comm | 6 | 27 | 33 | 18.2% |
| Site Visits | 2 | 140 | 142 | 1.4% |
| COV | 0 | 20 | 20 | 0.0 |
| Sub-Comm | 0 | 10 | 10 | 0.0% |
| ALL | 161 | 1648 | 1809 | 8.9% |



Panels “vs” Meetings

- ❖ 6-8 participants
- ❖ Discussion based
- ❖ Active meetings
- ❖ Panelists more responsive
- ❖ Operator asst. not needed
- ❖ Jabber, WebEx, “Skype”-like
- ❖ Need to “leave room”
- ❖ Multiple screens
- ❖ No recording or IMs between panelists

- ❖ > 10 participants
- ❖ Presentation based
- ❖ Passive meetings
- ❖ Members not as responsive
- ❖ Operator assistance suggested
- ❖ WebEx-like, need for more control
- ❖ Need to leave room?
- ❖ Single screen
- ❖ Recording/IM permitted



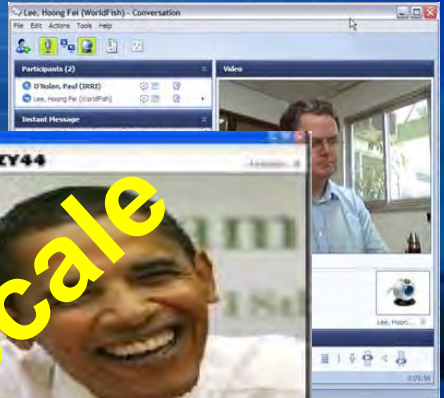


Virtual Panel Technologies



AT&T execs meet at a telepresence site. The screens are on high-definition video screens. (David Butov/Redux)

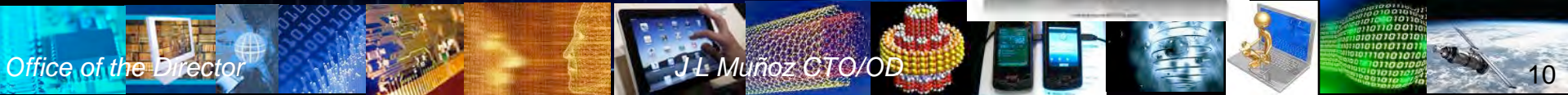
High-End



Mid-Scale



Low-End





Why Wholly Virtual?

- ❖ Smaller size, easier to manage virtually
- ❖ Smaller size consistent with screen sizes
- ❖ Social dynamics issues when mixing face-to-face and virtual panelists
- ❖ Some of the advantages that virtual panels provide will be compromised in hybrid panels
 - “Why take problems associated with face-to-face, and combine them with problems of virtual panels” Dr. Rosenzweig (MPS)
- ❖ Can be more readily tracked





A “typical” Virtual Panel



Polycom CX5000

- ❖ Fewer than 8 panelists (4-6 is better)
 - important to keep panelists engaged
- ❖ Fewer than 15 proposals
- ❖ Proposals that are not “complex”
 - this is really up to the PO/program as to what constitutes a complex proposal

❖ Less than a day, 1.5 days

- but divided over 2-3 days

❖ Conducted from PO desk

- camera and echo-cancelling headset

Second-Life Meeting



NO HARD AND FAST RULES!!



Monitoring the Goal

- ❖ Three methods have been identified for measuring progress toward the 5% goal in 2013
 - PARS based: when a panel is created it is now possible to indicate if this will be a wholly virtual panel (this is actually a projection)
 - GUESTS based: DAS combs through panels and travel and identifies panels that had zero travel
 - E-Sign-in: uses the electronic sign-in for VPs
 - will be the official reporting mechanism
 - e-sign-in not currently required, remind participants





Virtual Panel Challenges

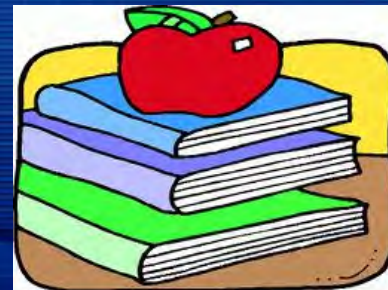
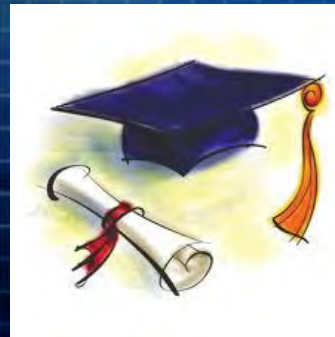
- ❖ Virtual team dynamics
- ❖ Security
- ❖ Loss of social capital
- ❖ Reduced opportunity to develop/evolve norms
- ❖ Typically will require multiple devices
 - ❖ Technical support help for panelists
 - help desk “off-hours” support?
 - ❖ Technology disruptions potential
 - ❖ Reviewers spanning multi time-zones
 - ❖ Adequate infrastructure?





Learn NSF Training Modules

- ❖ **Module 1- Virtual Panel Tools & Webex Training**
 - online interactive video
 - K. Otts Web-Ex course
- ❖ **Module 2: Conduct a Virtual Panel from Design to Delivery**
- ❖ **Module 3: Tools and Resources for Reviewers**
- ❖ **Module 4: Mastering Jabber for Virtual Panels**





Virtual Panel/Mtg Planning Chart

Also
applies
to Virtual
Meetings



Virtual Panel Development-Course 2

VP Planning Chart

Directions: Use the checklist to set up your Virtual Panel presentation.

| Video Panel Design | Check | Notes |
|---|-------|-------|
| Prior to the VP | | |
| 1. Equipment a. Test PC, Internet, audio and video) on-site and off-site or participants location(s). b. Turn off Private Chat ability between panelists. | | |
| 2. Information (NSF- Virtual Sites) a. Share Contact Information- Know your audience b. Have a list of all virtual panelist contact information including: alternate telephone numbers (besides the number they use to call Webex, IE a cell phone number), e-mail address, chat screen names, etc. to contact reviewers after COI removals, technical problems, etc. c. Add the contact information reviewers/external participants need to reach support. <ul style="list-style-type: none"> i. 703-292-4357 for the Helpdesk ii. 703-292-8186 for DAS Meeting and Event Management iii. Directorate/office IT Staff or Virtual Panel Champion | | |
| 3. Meeting Dates and Times. a. Designate dates and times (beware of time zones) and provide scheduled times or rotating presentations | | |
| 4. Sample documents a. Review and select Sample Documents provided by the Virtual Connections website as needed | | |
| 5. Limitation or abilities of equipment a. Determine limitations or abilities of equipment to support the VPanel | | |
| 6. Communication to Panelists a. Email/Communications to Panelists <ul style="list-style-type: none"> i. Meeting Agenda ii. Slides (support ESL participants) | | |
| VP Planning and Implementation | | |
| 1. Roles a. Define/Assign roles (Panel leader, Panels, VP Champion, IT support) b. Meeting Producer/Moderator/Host c. Presenter | | |





Summary

❖ Virtual panels/meetings are moving forward

- several pilots are underway
 - VPTF and Champions are operational
- Survey Monkey questionnaires... please use!!
- Learn NSF Virtual Panel training modules
 - Be on the look-out



❖ Goal of 5% wholly virtual panels in 2013 DOES NOT apply to virtual meetings

- goal does not apply to virtual meetings

❖ Looking for continuous improvement utilizing the Survey Monkey questionnaire





Questions

- ❖ **Regional virtual panel centers?**
 - being explored
- ❖ **Provide hardware/software to panelists?**
 - No
- ❖ **Adequate Help Desk support (off-hours)**
 - being addressed by DAS
- ❖ **Prorate panelists compensation?**
 - currently not permitted, has been discussed
- ❖ **Need to change context statement?**
 - up to program/PO
- ❖ **How are we going to measure broadening participation?**
 - looking for suggestions
- ❖ **Why not count panelists instead of panels?**
 - Answered, I thought, during the presentation.
- ❖ **Can NSF compensate panelists for cellphone costs?**
 - No, needs to be covered by \$280/day reimbursement
- ❖ **Running risk of panelists not coming in prepared**
 - flight and hotel time was used for doing the reviews

