Virtual Meetings

At NSF

November 2012
José L. Muñoz
Chief Technology Officer
jmuno@nsf.gov
- 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 CTO/Lead
- Aronson, Dorothy DIS
- Bennett, Keith MPS
- Feldman, Jean Policy
- Figueroa, Juan* ENG
- Major, Candace GEO
- Meacham, Steve OIA
- Perez, Paul DAS
- Powell, Matt OGC
- Rich, Jeffrey OIRM
- Rohlfing, Celeste MPS
- Roskoski, Joann BIO
- Scholar, Sandra OGC

* 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 results
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

<table>
<thead>
<tr>
<th></th>
<th>Virtual</th>
<th>Mixed</th>
<th>In-person</th>
<th>TOTAL</th>
</tr>
</thead>
<tbody>
<tr>
<td>Panels</td>
<td>42</td>
<td>302</td>
<td>1,605</td>
<td>1,949</td>
</tr>
<tr>
<td>Proposals</td>
<td>443</td>
<td>7,825</td>
<td>36,698</td>
<td>44,966</td>
</tr>
<tr>
<td>% of total</td>
<td>0.99</td>
<td>17.40</td>
<td>81.61</td>
<td>100</td>
</tr>
<tr>
<td>Props/panel</td>
<td>10.55</td>
<td>25.91</td>
<td>22.86</td>
<td>23.07</td>
</tr>
<tr>
<td>Panelists</td>
<td>245</td>
<td>3,160</td>
<td>15,460</td>
<td>18,865</td>
</tr>
<tr>
<td>Panelists/Panel</td>
<td>5.83</td>
<td>10.46</td>
<td>9.63</td>
<td>9.68</td>
</tr>
<tr>
<td>Proposals/panelists</td>
<td>1.81</td>
<td>2.48</td>
<td>2.37</td>
<td>2.38</td>
</tr>
</tbody>
</table>
## FY12 virtual participation results

<table>
<thead>
<tr>
<th>Mtg Type</th>
<th>Wholly</th>
<th>Non-virtual</th>
<th>Total</th>
<th>% Wholly</th>
</tr>
</thead>
<tbody>
<tr>
<td>Panels</td>
<td>153</td>
<td>1451</td>
<td>1604</td>
<td>9.5%</td>
</tr>
<tr>
<td>Adv Comm</td>
<td>6</td>
<td>27</td>
<td>33</td>
<td>18.2%</td>
</tr>
<tr>
<td>Site Visits</td>
<td>2</td>
<td>140</td>
<td>142</td>
<td>1.4%</td>
</tr>
<tr>
<td>COV</td>
<td>0</td>
<td>20</td>
<td>20</td>
<td>0.0%</td>
</tr>
<tr>
<td>Sub-Comm</td>
<td>0</td>
<td>10</td>
<td>10</td>
<td>0.0%</td>
</tr>
<tr>
<td>ALL</td>
<td>161</td>
<td>1648</td>
<td>1809</td>
<td>8.9%</td>
</tr>
</tbody>
</table>
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

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

- 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

NO HARD AND FAST RULES!!
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
Also applies to Virtual Meetings

## VP Planning Chart

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

### Prior to the VP

<table>
<thead>
<tr>
<th>Video Panel Design</th>
<th>Check</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>1. Equipment</strong></td>
<td></td>
<td></td>
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<tr>
<td>a. Test PC, Internet, audio and video on-site and off-site or participants location(s).</td>
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<tr>
<td>b. Turn off Private Chat ability between panelists.</td>
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<tr>
<td><strong>2. Information (NSF - Virtual Sites)</strong></td>
<td></td>
<td></td>
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<tr>
<td>a. Share Contact Information - Know your audience</td>
<td></td>
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</tr>
<tr>
<td>b. Have a list of all virtual panelist contact information including:alternate telephone number (besides the number they use to call Webex, IE a cell phone number), e-mail address, chat screen names, etc. to contact reviewers after CCI removals, technical problems, etc.</td>
<td></td>
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</tr>
<tr>
<td>c. Add the contact information reviewers/external participants need to reach support:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>I. 703-292-4357 for the Helpdesk</td>
<td></td>
<td></td>
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<tr>
<td>II. 703-292-8186 for DAS Meeting and Event Management</td>
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<tr>
<td>III. Directorate/office IT Staff or Virtual Panel Champion</td>
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<tr>
<td><strong>3. Meeting Dates and Times</strong></td>
<td></td>
<td></td>
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<tr>
<td>a. Designate dates and times (be aware of time zones) and provide scheduled times or rotating presentations</td>
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<tr>
<td><strong>4. Sample documents</strong></td>
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<tr>
<td>a. Review and select Sample Documents provided by the Virtual Connections website as needed</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>5. Limitation or abilities of equipment</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>a. Determine limitations or abilities of equipment to support the VPanel</td>
<td></td>
<td></td>
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<tr>
<td><strong>6. Communication to Panelists</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>a. Email/Communications to Panelists</td>
<td></td>
<td></td>
</tr>
<tr>
<td>I. Meeting Agenda</td>
<td></td>
<td></td>
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<tr>
<td>II. Slides (Support ESL, participants)</td>
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### VP Planning and Implementation

<table>
<thead>
<tr>
<th>Roles</th>
<th></th>
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</thead>
<tbody>
<tr>
<td>a. Define/Assign roles (Panel leader, Panels, VP Champion, IT support)</td>
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<tr>
<td>b. Meeting Producer/Moderator/Host</td>
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<tr>
<td>c. Presenter</td>
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*September 24, 2012*  
*Instructional Technology Office (ITO)*
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
MPS Advisory Committee

- Nov 8-9, 2012
- 21 AC members
  - 10 participated with only 1 on video
- Sound balance: Some were very loud, others not clear
  - Echo, choppy, feedback
  - Cellphones appear to be problematic
- Not being able to see who's speaking is awkward...just a voice
  - Good idea to have sheet with photo and background
- Required use of portable cam for in house staff....room 1235
  - Access to high-res room cameras not available to WebEx
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