Creating Innovation Leadership Solutions

Research on Research Co-Chair Guidelines

The following guidelines are designed for both new and experienced ROR Working Group co-chairs to assist them from the inception to the completion of their projects. They are by no means exhaustive, but should serve as a useful guide on the logistics and requirements of them as co-chairs throughout the project. Also included are insights that should help co-chairs to achieve the desired outcomes of their projects and avoid common pitfalls.

I. ROR Vision

The Vision of the IRI's ROR program is to be the leading forum to identify, lead, support and conduct research that enhances innovation. The vision is to be achieved through projects, programs and initiatives that:

- Capture the forefront of emerging thinking;
- Identify emerging concepts and best practices ;
- Develop actionable learnings; and
- Promote knowledge diffusion.

II. ROR Value Proposition

IRI's ROR activities provide R&D leaders the unique opportunity to work with peers from a variety of companies to identify, create, advance, and codify innovation management practices and develop new knowledge. These ROR findings can be effectively used in R&D leaders' organizations and can be spread through the IRI membership.

For ROR co-chairs in particular, their experience with their working group will allow them to participate in the development of best practices, to develop new knowledge relevant to their company and/or role and to gain perspective on their subject matter and beyond. This is in addition to the networking opportunities that will arise and the chances to establish new professional relationships. Basically, if it is the right project, it will really help and make a co-chair's day job.

III. Requirements to Lead an ROR

Those who would like to co-chair an ROR Working Group must meet the following minimum requirements:

- Membership in IRI; and
- Significant interest in the topic and a desire to create/identify best practices for the topic.

In establishing the Working Group, the co-chair must ensure that the group has a minimum of **two active co-chairs (one being the primary contact with the responsibility of reporting to IRI staff and the Knowledge Leadership Team) and is strongly encouraged to have three – four,** who will lead the project, **an active core team of participants** that could also include additional co-chairs, and potentially SMEs and IRI Emeritus members. A co-chair must also take into consideration whether he/she will be able to contribute the amount of **time** that the project will require. Ideally, the project will be a part of or will help you in your job. You will be assigned a member of the Knowledge Leadership team as a liaison, who will check in periodically on the project. Please let IRI staff know if you have a preference as to a particular member of the team early in the process. Groups may also be assigned a mentor from the Leadership Team who will serve as a sounding board and advisor for the project.

In the course of a project, it often occurs that one or more co-chairs finds him/herself no longer able to participate in the working group. It is incumbent on that co-chair to get someone to replace him/herself. If this does not occur, the remaining co-chair(s) should contact IRI staff as soon as possible to help to find a replacement.

Co-chairs generally have the:

- Genuine desire to learn and/or advance R&D management practices in a targeted area of interest critical to successful leadership in organizations.
- Ability to network with and recruit other IRI members as additional co-chairs or to serve as the core working team.
- Commitment to keep the ROR working group moving forward through regular meetings, including conference calls, special meetings, and IRI events .

Co-chairs effectively:

- Identify an endpoint early in the project, with clear deliverables, and have the energy to drive the working group to the project's completion.
- Identify, manage and coordinate with SMEs to assist the ROR working group, as appropriate.
- Communicate results through meetings, written articles, and/or publications.

IV. General ROR Project Structure

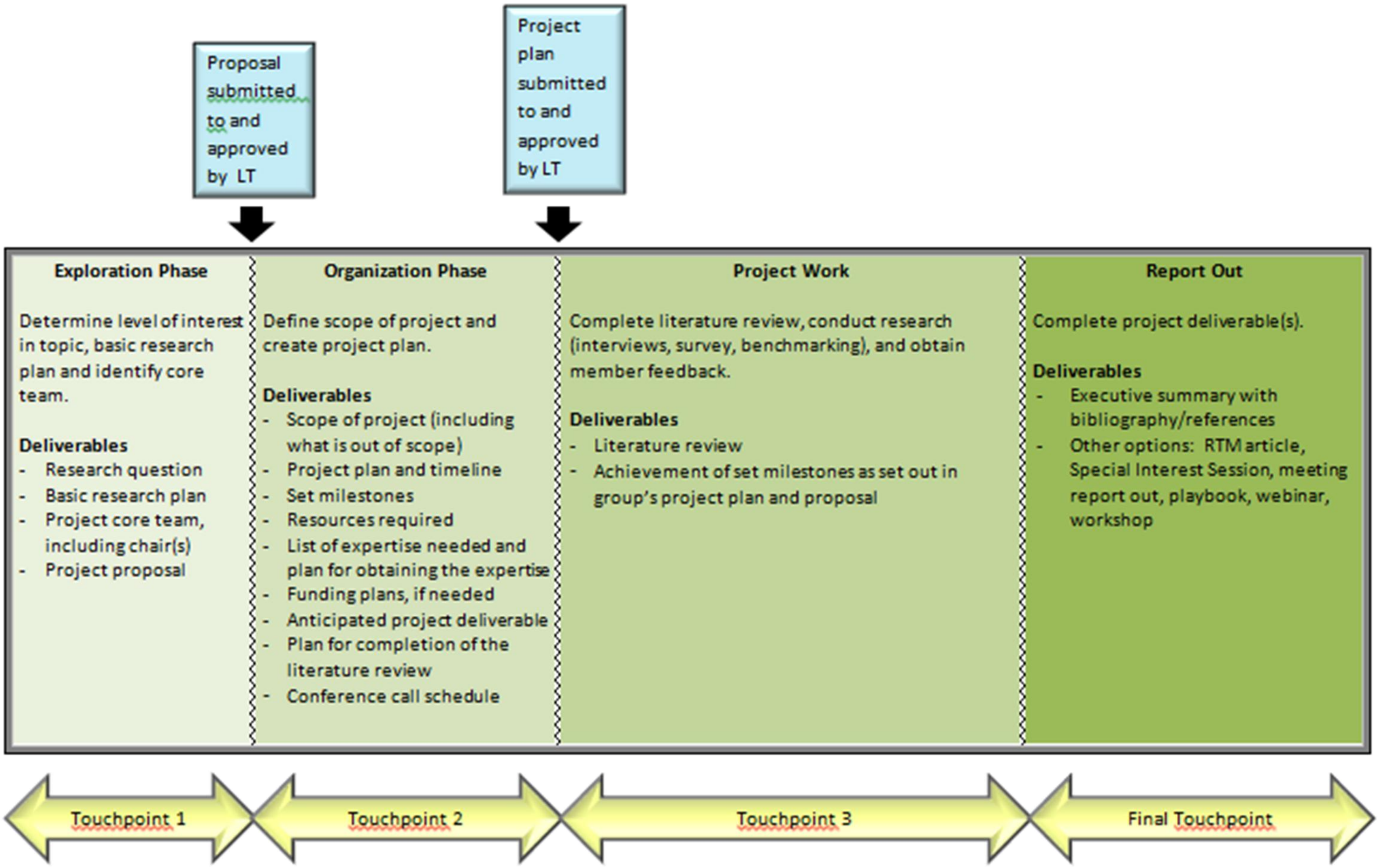
ROR projects generally fall into one of two categories: Identify & Share and Create & Develop. Identify & Share projects involve gathering all of the available knowledge and best practices on a subject and condensing them into a useful format. Create & Develop projects take this a step further and aim to create new knowledge on a subject and develop a new tool or practice.

Most projects will follow the plan outlined below. Note that a proposal must be submitted to and approved by the Leadership Team for a project to move from the exploration phase to the organization phase. A plan, including timeline, for completing the project must be approved by the Leadership Team for project work to begin. The requirements for the project plan are listed below. The Leadership Team will use the plan to check in with the group periodically to see if help is needed and the project is on track to complete on time. These checks will typically take place prior to IRI live meetings.

Project Plan Requirements

- Scope of the project (also what is out of scope)
- Timeline, including milestones and anticipated completion date
- Basic meeting schedule (e.g. bi-weekly conference calls for the duration of the project
- Resources required to complete the project (including expertise)
- Plans for obtaining these resources, including funding plan (if needed)
- Plan for completion of the literature review
- Anticipated project deliverable

Each project is required to produce an executive summary (2 – 3 pages) upon completion of their project. Most groups will also report out to the IRI membership by publishing an RTM article, holding a session at an IRI meeting, creating a playbook, or running workshops or webinars. Other means of reporting out are welcomed and encouraged by the Leadership Team.



V. SME Engagement

Co-chairs are encouraged to engage individuals with subject matter expertise and experience in a specific area(s) relevant to a working group project to help advance their work. SMEs are typically academicians or consultants (not IRI members). The individuals are invited to participate in an ROR working group to contribute their knowledge or expertise to a project. When working with an SME, co-chairs should bear in mind that the SME cannot lead the project. His/her contribution should be limited to subject matter expertise and experience and potentially facilitation and research. SMEs are volunteers and generally receive no compensation for their involvement and associated expenses. (Working groups have occasionally taken donations from working group member companies to cover SME project expenses.)

SMEs may use ROR-developed knowledge or materials in their own courses offered through their academic institution. After a paper has been submitted to RTM, SMEs may use information generated through their involvement in an ROR project in academic publications (proper attribution to IRI is required). They will be asked to sign IRI's [Participation Principles] at the outset of the project to ensure that they understand the intellectual property issues around the project.

a. SME Meeting Attendance

i. Each working group has one invitation to the entire meeting to give out to their chosen SME. The total number of consultants or service providers for all groups is limited to six, so groups are encouraged to get their invitations out early. The registration fee for SMEs is discounted from the member rate.
ii. Groups can bring in academics or other SMEs (not consultants/service providers) to attend their sessions only, free of charge. There is no limit on the number of individuals a team can bring in for just their session.

VI. Insights for Successfully Managing your Project:

Exploration and Organization Phases:

- Properly scope the project at the outset. Have a plan for the different resources and perspectives that will be needed.
- Form a core leadership team with clear delineations on who will handle the different aspects of the project.
- Establish a clear goal with success criteria and an end point at the outset. Objective drift can cause further difficulties down the road.
- Develop a workable project plan, including milestones.
- Conduct a review of past work on the topic (including the IRI archives).
- Use early sessions as a check point: Are we going in the right direction? Once that direction has been established, maintain focus and work to control the scope of the project.
- If needed, request that the group be assigned an ROR mentor. He/she can help to keep the project on track and advise on the best way to get the information that the group needs.
- Consider getting a global perspective for you project. IRI is a member of W-FIRA, the World Federation of Industrial Research Associations. Please contact the IRI staff liaison to gain access to SMEs and materials/discussions from IRI's sister organizations around the world.

Working Phase:

- Ensure effective communication within the working group: hold at least monthly conference calls between meetings.
- Stick to the project plan and track progress and milestones.
- Keep the Knowledge Leadership team and IRI staff updated on the progress of your project. If you run into problems, they will be able to help.
- Be prepared with an accurate, up to date description of your project and update IRI staff as it changes. This enables effective marketing of your project to potential participants.
- Engage the IRI membership. Many will be willing to help/contribute. Hold facilitated working sessions that will engage members at meetings and provide them with actionable results at the end of the meeting. Share with them how you see the results of the project being applied. For larger projects, brown bag teleconferences/webinars may be useful in engaging the members.
- One of the most common complaints from IRI members about ROR Working Group sessions is that they are not told enough about the groups before they are expected to participate in the session. You will be offered the opportunity to 'pitch' your session to attendees before your session starts. Be sure to prepare for this with the help of the IRI staff liaison. Additionally, at the start of your session, cover the following for attendees:
    - Your topic;
    - Your plan for the overall project;
    - Where you are in the plan;
    - The purpose of this particular session;
    - What you need from attendees;
    - What attendees will get out of it.
- As the project progresses, be flexible about how the group meets and interacts: different levels and types of input are needed at different stages. For example, toward the end of a project, it may not be necessary for a

group to hold a session at an IRI meeting. It may be more valuable for the group to have a closed meeting of the co-chairs to work on the deliverable. A brief report out at the meeting will still be needed.

Completion and Report Out:

- Be flexible about the deliverable that the group will produce. A new tool can be as effective as an article or white paper. The primary goal is to have a definitive and actionable work product. Examples of outputs include:
    - RTM article;
    - Report out at an IRI meeting;
    - Tool; or
    - Other vehicle for knowledge dissemination approved by IRI and the Knowledge Leadership Team.

  An executive summary (2 – 3 pages) is also required upon the completion of the project.

VII. ROR Progress Assessment

To support co-chairs in the facilitation of ROR projects and ensure that ROR projects are advancing research and technology and innovation management, the Knowledge Leadership Team will periodically check in with the ROR Co-Chairs. The purpose of the check-ins is to ensure the Team understands the focus and activities of the ROR working group, offer support to the working group and ensure projects are progressing toward the articulated goals in a timely manner. See Appendix I – ROR Progress Assessment below.

Appendix I - ROR Progress Assessment

The following questions were drafted by the Knowledge Leadership Team to guide discussions with ROR working groups and to support the working groups in examining the progress of their projects.

By the end of the Organization Phase, has your team addressed the following points?

- Has the objective and scope of the project been clearly defined?
- Are the objectives and scope realistic?
- Have at least two co-chairs been identified and agreed to co-chair the project?
- Have at least four other IRI participants agreed to be part of a core working group (actively involved in working on tasks between meetings) on the project?
- If the co-chairs have not been co-chairs on other ROR projects, has a mentor been identified?
- If an SME is needed on the ROR project, has one (or more) been identified?
- What will be the project deliverable?
- Are project team calls and meetings planned?
- Have core working group tasks (e.g., review open literature or IRI ROR archival data) been identified and agreed?

During the Project Working Phase, has your team addressed the following points?

- Is the project hitting the planned milestones and on track to complete as anticipated?
- Are project tasks being completed on schedule?
- Is there still a core working group involved with the project?
- If a mentor and/or SME were identified, are they participating as anticipated?
- Are you meeting regularly between IRI live meetings?
- Have any changes been made to the project scope or plan?

During the Report Out Phase, has your team addressed the following points?

- Have all project tasks been completed?
- Have the results been compiled and analyzed?
- Is the group's chosen deliverable being prepared?
- Have the results/findings been reported at an IRI live meeting?
- Is there a plan in place to complete an ROR report and/or draft an article for RTM and executive summary regarding the findings and results of this ROR project?
- If the project is not complete, do the co-chairs have a realistic time-line for when it will be completed and a justification for continuing the project?