To: Chair of the National Sea Grant Advisory Board

Site Visit Process Report
A Report by the Evaluation Committee of the National Sea Grant Advisory Board

April 2020

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Introduction

Site visits have played a central role during the most recent four-year evaluation of Sea Grant College Programs. The Evaluation Committee (EC) of the National Sea Grant Advisory Board (NSGAB) considers it important to reflect on these site visits and consider whether changes are needed for future site visits. The overall conclusion is that the process has matured to a high state of excellence. Nevertheless, as with any human endeavor, certain opportunities for improvement have been revealed. To assist the NSGAB with this analysis, we solicited comments from the main participants in the latest round of site visits, including National Sea Grant Office (NSGO) Program Officers, NSGAB members, site review team (SRT) members, and Sea Grant Directors. An email was distributed to these groups on November 26, 2019, which solicited comments on the duration, location, scoring system, briefing book and related materials, and types and scope of presentations (Appendix 1). We asked that these comments be submitted to a linked web site by December 20, 2019.

The EC received 33 responses and, in summary, 24 responses were complimentary, 25 responses suggested improvements, and 4 responses expressed concerns (Table 1). Appendix 2 shows the full comments in detail. The EC reviewed all responses and categorized them into four categories (training needs, site visit format, SRT preparatory materials, capturing the impacts of legacy work, and scoring and reviewer issues). Upon EC discussion, some comments were not addressed in the report either because there were directly contradictory views by the respondents or because the EC believed that a comment was beyond its advisory role.

Table 1: Survey results broken down into the categories of compliments, suggested improvements, and concerns. Responses tended to have a combination of compliments and suggested improvements. Only a few responses expressed concern.

Number of Responses that Provided Compliments	Number of Responses that Suggested Improvement	Number of Responses that Provided Concerns
24	25	4

Findings

The EC reviewed all 34 SRT reports, Directors' letters of response to program reviews, scoring data, and the survey results from SRT external members, Program Directors, NSGAB members, and Program Officers. The primary finding of the EC is that this round of Sea Grant program

reviews was the best they had experienced. The NSGO, in partnership with the Programs and the NSGAB, has designed a thoughtful, thorough, and useful review process. There were surprisingly few negative comments, indicating that the site visit process does not require a major overhaul. In general, the SRT reports were very consistent, numerical scores were generally well defended, as indicated by the fact that only four programs expressed concern about their scores. Scoring data in the four focus areas (Healthy Coastal Ecosystems (HCE), Sustainable Fisheries and Aquaculture (SFA), Resilient Communities and Economics (RCE), and Environmental Literacy and Workforce Development (ELDW)), show a distribution that approaches a bell curve, indicating a robust grading process with few deviations. It also indicates that all of the programs are performing at a high level, even those that are being asked to make process improvements.

The general consensus of the EC is that the entire review process is useful for the Sea Grant programs, for the NSGO, for NOAA, and very likely, for host institutions and stakeholders. It provides individual programs with an opportunity to undertake a critical review of their *modus operandi* and to synthesize their accomplishments in a coherent and meaningful way. It also offers programs and the NSGO an opportunity to display the high standard and impact of their achievements to a number of different audiences including stakeholders, university officials, the general public, and legislators. For the smaller programs, the process is particularly valuable to help them grow and become more productive. It is thus more than a merit exercise.

The EC views the audience for this report as the entire Sea Grant network with recommendations applying to all three components of the network (NSGO, NSGAB, and the Sea Grant programs). It should be emphasized that the EC believes that from a government accountability standpoint the Sea Grant evaluation system is one of the more robust in the federal government and that this most recent iteration of Sea Grant evaluation has continued to improve the evaluation system. That being said, the below recommendations are offered in the spirit of making a good evaluation system even better.

Recommendations

Training

The EC found that NSGO staff has generally done an excellent job by offering numerous training opportunities while launching and executing the evaluation system. There are, naturally, lessons to be learned as training needs are considered for the next cycle, particularly since there will always be new entrants into the Sea Grant system. We received and addressed a number of recommendations on the topics of training NSGO staff, individual Sea Grant program staff, and

Site Review Team (SRT) members that would improve and assure a coherent execution of the site visit process. Topics of training sessions should include:

- A detailed discussion on the purpose of the review for all Sea Grant network participants;
- NSGO training for the chair and co-chair, particularly for individuals new to the evaluation system;
- A session for SRT participants on the use of the Planning, Implementation, and Evaluation Resources system (PIER) system and what it contains and how it is organized;
- An advanced discussion of the rating system; this would include an emphasis during site visits, that chairs and co-chairs need to regularly remind SRT members of rating criteria/definitions to maintain a consistent perspective;
- Expanding the pool of SRT candidates, particularly to include senior university officials, and to effectively couple reviewer assignments with the priorities of the program to be reviewed;
- Maintain the procedure of holding two conference calls starting a month prior to a site visit and meet for dinner prior to the site visit to discuss and re-enforce review criteria and to build rapport among SRT members. Consider the preparation of a short tutorial prior to the site visit.

The EC suggests that programs need more guidance/training on the purpose of the briefing book and its intent, in that there was unevenness in their quality and what was conveyed.

- NSGO staff should prepare a Webinar with the programs on briefing book preparation and purpose;
- NSGO Program Officers (POs) should provide and share examples of effective briefing books to serve as models, especially for new program leadership;
- NSGO POs should suggest Best Management Practices (BMPs) for Directors in presenting materials including how to best weave elements together to tell a story.

With regard to bringing consensus on individual SRT members ratings, the EC noted some inconsistencies in how program officers handled the process at different site visits. Also, there were inconsistencies in how scores were formally reported at the end of the review from one program to another. One set of procedures should be used for all site visits.

- A script should be provided for the opening part of the report-out, including a description of the categories of Standards of Excellence, as well as the ratings and the supporting language surrounding the ratings.
- An SRT consensus determination of a rating is preferred. The EC recommends a two-step process for building a consensus, 1) a facilitated discussion by the chair and co-chair with SRT members that leads to consensus; and 2) if a consensus cannot be reached, an average should be taken and that average be applied to determine the final rating.

Format

During the Sea Grant program site visit process, several issues arose regarding the format of the site visits and the written materials provided for the reviews. The issues are addressed below and include: 1) travel during the review, 2) time limits for each days' activities, 3) time for writing the report, 4) the use of absolute statements, 5) the format for the Focus Area oral presentations, and 6) the oral report-out at the review.

The current policy to limit travel during the site visit, for example to labs or off-site facilities, is intended to provide more time to dedicate to the review. The EC agrees with the current policy, however, recommends that at the discretion of the SG Directors, more flexibility be allowed to visit a nearby lab or show examples of Sea Grant accomplishments through field visits. The EC believes these opportunities would make the review more interesting and informative.

The EC supports the current structure of having time limits set for how long a day the events on the agenda should last. Nominally, an 8am-5pm agenda which includes working sessions and one evening reception should be allowed with only rare exceptions.

The EC supports and reinforces the need to adhere to a format of having at least a half day at the end of the site visit to write the report. One model that seemed successful is assigning writing assignments to SRT members during the first conference call before the site visit and encouraging the SRT members to start their writing based on the Briefing Book, PIER Report, and other materials provided in advance. This approach helps frame SRT member questions in advance and should reduce the writing burden while on-site. The EC advocated for the opportunity to spend time privately in the evenings (or early mornings) to collect their thoughts and do some writing, which can be reviewed as a group in a morning session. The EC has a word of caution to not conduct formal writing sessions late into the evenings.

Some site visit reports included "absolute" language that obfuscated the intention of the findings. For example, use of phrases such as, "no one …," or "the program always…" create the opportunity for findings to be contested. The EC suggests that site visit reports avoid "absolute" language.

To improve the verbal presentation format, the EC recommends that, as a Standard Operating Procedure at a site visit, each session for a focus area presentation should include an introductory presentation about the major thrust of the focus area and how it has been implemented. Introductory comments should also indicate how each presentation relates to one another, the overall goal of the session, and performance measures. The sessions should then be wrapped up with stakeholder feedback (if appropriate) and summarized by tying the presentations to the program's impacts.

The site visit is concluded by an oral report from the SRT (typically the NSGAB co-chair) to the program and senior institution administrators. Both the scores and their supporting justification should be provided in the final sessions with the program and with the institutional leaders. In the subsequent written report, any alteration from the oral presentation should be grammatical and should not change the content or spirit of what was presented to the program at the review. The goal is to ensure that the programs and their institution are not surprised either by their scores or by the supporting reasoning.

SRT Preparatory Materials

The two main preparatory materials sent to the SRT members are the Briefing Book from the program and the PIER report from NSGO. The Briefing Book should be required to include a summary of what is in the PIER report or at least reference PIER report pages to be used as a data reference document in support of the Briefing Book materials.

PIER reports are often confusing to SRT members. The EC suggests a reevaluation of the structure and length of the PIER report and advocates for a more synthesized presentation of the materials contained within it. A suggested format would be to have the important data (performance against metrics, peer reviewed publications, etc.) up front in the report along with a listing of impact statement titles only. The full discussion of the impacts could then be placed in an appendix and hot-linked to the title for easy access.

A related suggestion is to have NSGO provide training on how to best utilize the PIER data as well as communicate it, both for the programs and for SRT co-chairs (POs and NSGAB). POs should go over the PIER report with the SRT members during the first conference call to make sure everyone is comfortable with it, show how you use it, and show how the PIER database can be a great source of questions from the SRT. For example, when targets and accomplishments differ by orders of magnitude, there is a story to be told and understanding to convey. The EC believes that the PIER data greatly enhanced the communications of accomplishments for several programs during the review cycle by, for example, showing impacts that were not highlighted in the presentations or the briefing book.

Accurately Capturing the Impacts of Legacy Work

Two challenges that emerged several times during the reviews was how PIER and the programs' presentations can best capture legacy work that comes to fruition during the evaluation period.

Research often takes more than four years to come to fruition, which raises a question regarding how to count work accomplished before the review period. Although we are aware that these reviews are focused on work done in a certain four-year timeframe, the ultimate purpose of

review is to capture all of the impacts of programs including legacy work. During the four-year timeframe under review, accomplishments from past work that a program may want to highlight could include paper(s) published, new technology(ies) deployed, policy(ies) implemented, or award(s) received. These need to be captured as SG program impacts and accomplishments, even if the actual work supported by SG was accomplished before the period in review. The EC supports acknowledging these "over the horizon" and legitimate accomplishments and suggests that the NSGO establish a mechanism to appropriately enter legacy work in the PIER report and/or the briefing book to be considered by the SRT.

Accurately Reporting Competitive Research in Extension Activities

There is an expectation that 40% of a Sea Grant program's core funds should be targeted to support competitive research or research-focused education projects. Several programs expressed concern that their research contributions are underreported because competitive research conducted by extension agents and specialists are not being used to meet that 40% target. In addition, there seems to be confusion about the 40% competitive research target and the repercussions for not meeting that target. This issue could be addressed as a component of PIER training, however, the EC believes it needs a more thorough clarification and suggests that the NSGO Director ask the NSGAB to appoint a subcommittee to advise on this issue for the purpose of clarifying or revising the competitive research policy.

Scoring and Reviewers

Sea Grant's program evaluation processes are designed to ensure the greatest benefit for federal and state investment and to support the continued improvement and impact of Sea Grant activities. The goals of evaluation are also designed to meet statutory and regulatory mandates for evaluation and merit, to evaluate overall effectiveness of Sea Grant Colleges and Institutions, and to improve program performance.

The goals of reporting are to provide data on a routine basis to assess program progress towards common performance measures and metrics, impacts and accomplishments, and financial management.

As part of the site visit, all programs also undergo an in-depth review to evaluate how effectively they performed with respect to leadership and productivity. This evaluation investigates the program's progress towards its own Strategic Plan, organized by the national focus areas. The EC endorses the continuance of evaluating programs against their own strategic plans and not against each other. This approach makes the reviews less subjective. Impacts, accomplishments, and success in reaching performance measures are assessed in categories that correspond to national focus areas which are:

- Healthy Coastal Ecosystems
- Sustainable Fisheries and Aquaculture
- Resilience Communities and Economies
- Environmental Literacy and Workforce Development

The EC commends the NSGO for several process improvements in the latest four-year review and wants to build on those improvements by addressing issues surrounding the rating scale used in the evaluation, the makeup of membership of the SRT, issues with target setting, and the perception of there being a black box for merit pool assessment and application.

There was some unevenness concerning the meaning of the rating scale, which may have led to some inconsistency in its application across the 34 SRTs and specifically with respect to the numerical rankings.

Because the scores are related to performance payouts, there was concern expressed both by the EC and in the comments that were collected regarding the current scoring system. Ratings serve several purposes in addition to evaluation of merit budget increases. They provide: a benchmark against which a program might plan, a model and guide for other programs, and a statement to the home institution on the quality of its program, among other uses. Applying a numerical rating may not benefit all of these purposes inasmuch as, for example, a rating of "3" may be equated with a grade of "C," when it actually means a program is providing excellent service in a given Focus Area. For this reason, it is suggested that the ratings be amended as follows with the deletion of numerical scores.

The proposed ratings are:
- Demonstrated accomplishment of the highest merit
- Demonstrated accomplishment of special merit
- Demonstrated a high standard of excellence
- Performance below that expected of all Sea Grant programs
- Performance far below that expected

The assignment of scores measuring a program's accomplishments against its strategic plan is a complex process based on the information provided to the SRT in the presentations and written materials handed-out during the site visit, as well as the materials provided in advance of the visit including, for example, a briefing book provided by the program and the PIER report provided by NSGO. Given the proposed rating system shown above, clear language that describes why a rating was given for a particular focus area needs to be consistent, so that a rating of "Demonstrated accomplishment of special merit" indicates that performance clearly and significantly exceeded expectations. And a rating of "Demonstrated accomplishment of the highest merit" should be rare and exemplary.

Several comments collected by the EC addressed the issue of target setting. The program performance targets are a valuable component of the evaluation system and provide a foundation of the rating system. Demonstrating performance against proposed targets allows for informed evaluation by program management and SRTs. Nevertheless, when a program routinely exceeds targets by one or two orders of magnitude, it raises questions as to whether the targets were realistic. Setting realistic targets is a difficult and complex process but is nevertheless crucial. Despite our best efforts we often miss the targets by over or under estimation.

The NSGO's annual reporting guidance allows for yearly updating of performance targets with approval from the NSGO. The EC supports and emphasizes the need for programs to annually review their performance targets and to work with the NSGO to revise them as needed. We suggest that when rating a program's focus areas, future SRTs remain highly skeptical when the reported metrics for an activity significantly diverge from programmatic targets unless there is compelling rationale provided for the discrepancy by the program. We further suggest that, in the future, if there is a major mismatch between a performance target metric in PIER and that which is reported, without a convincing justification, the SRT should view it negatively inasmuch as the program did not follow procedures for adjusting targets annually in concert with approval from the NSGO.

As in the past, the SRTs ought to have membership that is appropriate to the goals and activities of the program under review. It is also essential that SRT members possess the level of experience and stature that ensure the evaluation is both fair and meaningful, both to the program as well as to its peers, its stakeholders, to NOAA, and the program's home institution(s). To increase the number and diversity of appropriate candidates, it is recommended that the Sea Grant network together with the NSGAB and other sources continue to be surveyed to identify appropriate possible SRT candidates well before the next review cycle. This would allow for vetting their appropriateness and willingness to serve in a timely manner.

While concern was expressed regarding the inclusion of Sea Grant Program Directors in each other's reviews, the EC strongly believes that the benefits far outweigh any slight potential for conflict of interest. By participating in one another's reviews, the Program Directors learn about other programs, become aware at a deep level of potential synergies, and have the opportunity of watching the review process in another program. Especially for new Directors, participating in the review of another program provides an outstanding opportunity to better prepare for their own. When a potential conflict of interest may occur, it is recommended that the Director consult with the NSGO concerning their specific issue(s).

One conflict emerging from the collected comments regards the scoring of a program by another SG Program Director. The EC acknowledges this concern and recommends that, in the future,

SG Directors who participate as a member of an SRT be allowed to participate in the discussion of scores but not provide scores themselves.

The EC recommends that the size of the SRT should not be allowed to drop below five people, including the co-chairs. The writing and reporting burden is considered too onerous for four, or fewer writers.

Lastly, findings from the survey expressed concern around how the determination of the merit pool is assessed and applied. The NSGO should clearly communicate where in current policy this language resides and how it is applied. The Inside Sea Grant webpage has a subsection where all reporting and evaluation guidance resides, including the PIE policy and site visit guidance.

In conclusion, the EC has conducted a thorough review of the entire site visit process. Our conclusion is that, while a considerable effort is required by the individual programs, by the NSGO, the NSGAB, and the SRT members, the process has matured, generates an impressive amount of useful information, and thus is very beneficial, useful, and informative for the entire Sea Grant community and its various stakeholders.

Appendix 1 - The Survey

A request was sent via email requesting feedback on the site visit processes. The request is as follows:

We have now completed the most recent four-year evaluation of the Sea Grant programs for which site visits play a very important role. As we look forward to future rounds of site visits, it is very important that we reflect on these most recent site visits and consider/recommend changes (if any) to future site visits. As a participant in these site visits during the past year, we would like to hear your overall comments from the perspective of the site visit(s) for which you participated. Comments on the duration, location, scoring system, briefing book and related materials and types and scope of presentations are particularly welcome.

Please use the following link to submit any comments you may have by December 20.

Appendix 2 - Survey Responses (blinded)

The Evaluation Committee queried those most involved in the site visits (SG directors, NSGO Program Officers, NSGAB members, and external reviewers) to assess feedback on the site visit process. The purpose of the survey is to provide the Evaluation Committee with information to assess the overall process and to determine changes to improve the next round of site visits.

This report represents a breakdown of the number of survey responses into categories of compliments, suggestions for improvement, and expressing concern. The survey received thirty-four responses (note some individuals responded multiple times).

Table 1: Survey results broken down into the categories of compliments, suggested improvements, and concerns. Responses tended to have a combination of compliments and suggested improvements. Only a few responses expressed concern.

Number of Responses that Provided Compliments	Number of Responses that Suggested Improvement	Number of Responses that Provided Concerns
24	25	4

Compliments

The information provided below represents high-level topical breakdown of survey responses who provided compliments.

Process (7 responses or 21%)
- The entire process was well designed, organized, implemented, informative and engaging. Much improved process over the past process.

Positive Experience (6 responses or 18%)
- The site visit was a positive experience and would participate again

Meeting Duration (6 responses or 18%)
- Good balance for a site visit, the 2.5 day duration of the meeting was enough to learn about the program; have programs address the Standards of Excellence and performance. Any longer than that would have been a significant drain on the program and on the site review team.

Review Materials (5 responses or 15%)
- The materials for the review provided a clear picture of the program: PIER report, briefing book, presentations and poster session. Appreciate flexibility of materials,

presentations, format individualized for each program. It took all the elements together and no one informational item could stand alone. The new, combined Briefing Book format is an improvement over the previous structure, with 2 documents required. Poster session was a good way to get insight into specific funded research projects and engage with researchers.

Communications (5 responses or 15%)

- Program clearly communicated information while not inundating, mapped criteria to information provided, to clearly show impact on important issues and to be able to tie research with outreach and education. A synthesis for each panel/topic (before or after panel) for major take home points was helpful.

SRT Program Feedback (4 responses or 12%)

- Feedback from SRT to program was supportive, appropriate tone was used, and SRT worked with program in a meaningful way to enhance the program. Incredibly valuable to get benefit of wisdom and assessment from external panel. Panelist that were able to frame feedback in context of Sea Grant's role and impact were much more impactful then providing feedback on individual projects.

Programs Expressed Usefulness (4 responses or 12%)

- The process of preparing for the site visit was a very useful exercise from the program's perspective to revisit what the program has accomplished, gather and update program materials, and reflect on what can be improved upon due to this introspective.

SRT Participate Expertise/Background (3 responses or 9%)

- Review panels with varied background and expertise/perspectives were beneficial in determining outcomes.

SRT Side Meetings Beneficial (3 responses or 9%)

- Building time into the review for SRT gathering in side meetings were extremely beneficial to discussing what was heard, weighing findings, and drafting report.

Hearing from Stakeholders (2 responses or 6%)

- Appreciated hearing from stakeholders, the former PRP process never allowed for stakeholders to speak to the value of research.

Scoring (2 responses or 6%)

- Scoring was fair and what was expected.

Sea Grant Director Participation (2 responses or 6%)

- Sea Grant Director sitting on an SRT was helpful, perspective was valuable, questions and comments enriched the SRT panel's dialog. Some programs invited other regional directors to sit in on their reviews, which was very informative and that type of observation can be very helpful with respect to cross-program collaboration.

Interactions with University (2 responses or 6%)
- Interactions with university administration at beginning and end was key for ultimate utility of feedback received from SRT. One of the strengths of the current format is having the report out to university leadership. We strongly encourage that this element be retained.

Time Management (1 response or 3%)
- Writing up the evaluation during the site visit was beneficial. The writing time was about the right amount needed.

Review Utilized for Program Change (1 response or 3%)
- The ability to leverage the intellectual capital and leadership of a site review team to influence much needed program changes.

Program Officer Participation (1 responses or 3%)
- Program Officer leading the review in a non-voting role worked well.

Suggestions for Improvement
The information provided below represents high-level topical breakdown of survey responses who suggested improvements.

Review Materials (11 responses or 32%)
- There was a lot of information to absorb; similar to drinking from a firehose. The depth and breadth of the material of the program makes these reviews difficult.
- Recommend some additional front-ending for reviewers; this would include advanced discussion of the scoring system, and assignments for reviewers.
- The materials came in a bit late, precluding a deep read prior to the visit.
- There are better ways to provide more rigorous information than the briefing book. The briefing book should be an introduction of what the programs do but the real impression of what they do is offered by the clientele that shows up at the site visit. Recommend sharing briefing books, these are tremendous resources about the programs and would also be useful for cross-program collaboration.
- Programs needed more guidance on the briefing book purpose and intent; some books were much better than others. POs were able to provide feedback on agendas, could have

also provided feedback on briefing books about whether the scope of materials presented was adequate so the team had information necessary to score the program.

- The PIER report was very dense, therefore difficult to use. The PIER report was late and thus not affective to use in the review; the report needs to be provided on time with the rest of the material. Reevaluate structure and length of PIER report, present it in a more synthesized manner.
- There is value of program performance targets, but when the program routinely exceeds targets by one and two orders of magnitude, it raises questions about whether the targets were realistic.

Scoring (8 responses or 24%)

- Didn't like upside down scoring system. The scoring guide rubric is confusing to interpret, need better definitions.
- Scoring should allow for greater resolution by allowing a single decimal point.
- Continue to improve guidance to programs on scoring. The scoring system is very ambiguous but thanks to the diversity of evaluators and the planning team is a just process that tries to evaluate the real value of the efforts developed by the programs.
- Scoring against strategic plans was very difficult, particular because the strategic plan targets were not always consistent in scope or target setting. Suggest creating a scoring matrix for the focus areas that the SRTs can follow, instead of comparing back against the plan.

Communications (7 responses or 21%)

- Materials demonstrated during the site review are very important since the programs can show tools, publications and other materials that can provide a better idea of the work performed by the programs.
- Briefing book and presentations did not match PIER report. Continue to improve the guidance provided to programs; especially on what should be included in the briefing book and how not to overwhelm the SRT with presentations (sometimes more is not better).
- Suggest BMPs for directors in presenting materials; how to weave elements together to tell a story; some programs were better than others. Panelists that were able to frame their talks in the context of Sea Grant's role and impact were much more impactful than those that just talked about an individual project.
- Hard to determine what role Sea Grant played in a project and should be part of every presentation and information on projects. Presentations should highlight both research and extension efforts and should be limited to impacts and have a question period at the end. Consider if there are ways to rely a little less on speakers presenting materials on slides to help reviewers maintain focus and possibly to allow more one-on-one discussions with program staff. Provide the presentations to reviewers at the beginning of

the review so reviewers don't have to take so many notes and so they can look back at materials to connect topics and to help prepare review report.

Process (6 responses or 18%)
- Re-evaluate the four-year timeframe under review; it doesn't capture those items started a decade ago that are just now coming to fruition.
- The relative weight of evaluation criteria should be emphasized and articulated more clearly. The black box of the merit pool assessment and application should be better clarified. As currently designed with merit funds, good programs can lose money if the whole network does well. This creates dangerous incentives for programs and some reviewers.
- There are opportunities to standardize the process more to make the review a more level playing field. I suspect that there will be wide variability on what constitutes a particular ranking (i.e. what does it actually mean to exceed a standard by a "significant margin in some aspects")? Additional clarity, such as a rubric, will need to be provided to ensure consistency across the teams.
- Perhaps a clear focus on several specific components of the program would make them a bit more valuable than trying to review the whole extent of the program.
- The Sea Grant site visit process is a stressful, difficult and time consuming process for both reviewers and reviewed but one that is part of the success of Sea Grant.
- Affective (Process) (Asserted values or judgement by communicating feelings or attitude on process)
  - I can't help feeling that we've lost the FEELING of these programs, the spirit and passion that makes them special.
  - We don't have a clear sense of what values are driving our evaluation. There is a laundry list of things we 'must-do', and we've shaped a process to meet those things, without really understanding and addressing the values underlying those 'must-dos' and the cost of that process to our programs and our people.
  - Re-think the whole evaluation, not process driven but build a values-driven, human-centric process that makes sense for the level of investment and the nature of our partnerships.

Preparation Time (5 responses or 15%)
- There was a lot of time and preparation to prepare materials for the review. The amount of effort (time, money, and such) spent on review is large. The level of effort involved should be somewhat proportionate to the size of the program being reviewed. Rethink the complexity and scale of our site visit process and make it no less rigorous but absolutely more proportionate to our federal investment. We can learn the same things about a program in a more abbreviated format.

Informal Events (4 responses or 12%)

- Sitting in a room all day was exhausting. Informal events is where real conversations allow for the getting the spirit and passion of programs. A little more flexibility to show at least one lab or field visit would make the review more interesting. Would like to see half day to encounter actual resource and meet people on the water.

Time Management (4 responses or 12%)

- Need more time for SRT discussion and writing of report. Need a half day for writing the report.
- At least one of the days the briefings ran so much longer than planned that it affected the ability for the SRT to discuss topics.
- Need time limits for how long a day of events should last (i.e. 8am-5pm that includes working sessions and allowing for one evening reception).
- Time and money can be saved by doing panels virtually.

Location (2 responses or 6%)

- Have meeting location different from hotel where reviewers are staying at (felt locked in all week).

Meeting Duration (2 responses or 6%)

- Shorter visits meant that the intensity and speed of presentations was sometimes overpowering. Would not make the site visit longer.

SRT Program Feedback (2 responses or 6%)

- Panelist that were able to frame feedback in context of Sea Grant's role and impact were much more impactful then providing feedback on individual projects.
- The site visit reports need to be clear on where programs fell short and where areas of improvement can be made in. This kind of feedback is instrumental in helping programs improve efficiencies and effectiveness.

SRT Participant Expertise/Background (2 responses or 6%)

- Having different SRT members for each program's site visit introduces variability in evaluations as well as subjectivity. Selection of the review team is critical, there needs to be consistency across all SRT members. There is a lot of inherent bias and subjectivity in play depending on the subject matter expertise of the reviewer and their familiarity with the program begin evaluated. A close look at the reviewer selection process seems warranted.

Sea Grant Director Participation (2 responses or 6%)

- The role of Sea Grant directors on the Site Review Teams needs to be reconsidered. This process now includes an assessment of performance that is tied to rating scores and thus merit funding and having a SG Director on the Site Review Team potentially introduces a conflict of interest. Reconsider the role of Directors in reviews that have a financial outcome and that are in direct competition with merit funds.

Program Officer Participation (2 responses or 6%)
- Suggest Program Officers be assigned as SRT chairs to programs other than their normal assigned programs, then be allowed to participate substantively with their usual programs in executing their reviews. This might enhance SRT objectivity while providing programs greater support.
- The process would be improved with providing more structured program officer training. One suggestion would be to use some of the notes, practices, and experiences from this cycle to develop some scenario-based training for the next evaluation cycle.

Outcome Impacts (1 responses or 3%)
- Encourage greater emphasis on outcome impacts in the review materials.

Review Discussions (1 responses or 3%)
- Would have benefited from more discussions during the review and less presentations.

Recommendations and Suggestions (1 responses or 3%)
- Distinction between recommendations vs. suggestions needs to be clearer.

Interactions with University (1 responses or 3%)
- Need to have shorter condensed version of report out to University officials

Comparison to Other Programs (1 responses or 3%)
- Process needed to contextualization with other sites as comparators.

Public Comments (1 responses or 3%)
- Public comments received should be shared with Director.

Travel (1 responses or 3%)
- Travel arrangements could have been smoother with a less siloed approach to communications.

Site Review Report (1 responses or 3%)

- Limits should be set on number of recommendations, suggestions, findings, and BMPs. Some reports became quite lengthy, making it hard to determine what elements the program should focus on when incorporating comments for future planning.

Concerns

The information provided below represents high-level topical breakdown of survey responses who expressed significant concerns.

Communications (2 responses or 6%)
- There seemed to be a real disconnect from what one program heard in their debrief and what appeared in their site review report. The debrief gave the impression that the program would ultimately receive high grades for their work. That was not the case, and left the program team very disappointed when they received their written review some time later.
- There seems to be some confusion on whether a program was evaluated based on national performance measures/metrics or program measures/metrics; seeking clarity in guidance document.

Inconsistencies in Application of Process (1 responses or 3%)
- Inconsistency in how program officers handled the process at different site visits with regard to coming to consensus on ratings and then formally reported those scores to one program and not to the other program. One set of rules should have been used for all of the program reviews.

Bias and/or Conflict of Interest (2 responses or 6%)
- A Site Review member had clear conflict of interest and obvious bias on behalf of industry (to the exclusion of other interest groups.) This individual clearly did not understand, or value, the need for a Sea Grant Program to act as an honest broker working with all interested parties. During a closed session at the review, there was a heated exchange with this reviewer and program leadership team, where the program were strongly (and inaccurately, in directors opinion) accused for "not meeting the needs of industry". This exchange was highly unprofessional and left the program leadership team shaken and upset. The other panelists appeared to be shocked and speechless as well. Since the director clearly have a vested interest in the outcome of their site visit, the director urges the Evaluation Committee to talk to others that were in the room during this conversation (the Site Review Team and observers from the National Sea Grant Office and the NOAA's Grants Management Division). It is unclear what bearing this Site Review member had on the final assessment, but the program director suspects that

their final review scores and narrative will be adversely (and unfairly) impacted as a result of this reviewer's conflict of interest.