



KAREN Champions

Evaluation Report

September 2009

Defn: Champion: someone who has defeated all rivals

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Audience

The intended audience for this document are:

- REANNZ staff members
- REANNZ Board members
- KAREN community
- Research Funding Bodies, eg MoRST, FRST



Executive Summary

We recommend that REANNZ continue to support the role because of what the KAREN Champions have achieved to date and the low level of direct financial cost to REANNZ.

Champion themes

- The KAREN Champions title has provided most Champions with the opportunity to promote KAREN to their senior leadership teams.
- KAREN Champions worked well as the first point of contact for KAREN related issues within their organisations and with other KAREN Members.
- The role has contributed to our Members increased capability to use KAREN in their core businesses and to understand the value that their KAREN membership gives them.

Champion successes

- Members have shown their ongoing support for the role by financing it internally.
- KAREN Champions have helped convince their respective senior leadership teams to continue to pay their KAREN membership fees.
- KAREN Champions have defended KAREN as an essential tool to Treasury and our Minister.

Champion challenges

- Some KAREN Champions lacked support from their Senior Leadership.
- Limited communication between Member IT and Research Departments slowed the adoption of eResearch tools and methods.
- Science funding bodies do not support eResearch.
- Staff are time poor and spending time on eResearch tools and methods is not widely supported in their workplans.



Introduction

Origins

At the time the initial funding for what would become KAREN was being developed by Members and the government, it was recognised that investing in capability development would be critical in the ultimate success of any network investment. Funding pressures reduced the initial envelope for capability building to \$3.8 million out of the \$43 million initial Crown investment.

An Advisory Panel and set of processes were established to invest this Capability Build Fund in accordance with an Output Agreement under MoRST.

There is often confusion that the KAREN Champions programme is synonymous with the activity and investments of the Capability Build Fund. This is not the case.

Around the same time that the Capability Build Fund was being established (late 2006 and early 2007), REANNZ recognised the need to build a strong community around the network. However, REANNZ was not resourced to undertake significant activity itself (even if such a path was desirable) and so created the concept of "KAREN Champions."

The Champions group would be a sub-set of the wider community comprised of a range of people: researchers and educators, network specialists, IT directors, research leaders. They would all have in common a recognition that KAREN was essential infrastructure for the future of New Zealand and a desire to help.

- promote general awareness of KAREN and eResearch,
- promote KAREN's value to the senior leadership of their organisation

To provide some recognition and reward for Champions a hierarchy of awards was created: KAREN enabler, KAREN champion, and KAREN fellow. Find out more about these categories at this the KAREN website, <http://www.karen.net.nz/karen-awards-criteria/>.



Institutional Capability Build Fund 2008-2009 (CBF)

The one overt overlap between the Champions initiative and the Capability Build Fund was the ICBF. To give the Champions (and our Members) a boost, the REANNZ Board allocated \$850,000 from the Fund (\$50,000 for each Member) to help Members promote KAREN awareness and eResearch capability within their organisations.

A key differentiator of this sub-Fund was that REANNZ would not stipulate any detailed goals or expectations from Members and would put in place only light reporting and outcome expectations. We deliberately took the approach of trusting our Members to do the right thing – and of minimising transaction costs associated with the very small amount of funding.

Each Member submitted a plan that was approved by the Capability Build Fund Advisory Panel. (These plans ended-up to be largely focused on building video conference capability, raising awareness of KAREN and rolling out some specialist services valuable to specific Members.)

Those projects are now finished and both the projects and the approach taken for this investment tranche have, overall, been successful.¹

¹ All of the programs of delivered by KAREN Members may be read on the KAREN wiki at the following web address. Click on the member name that you would like to read, and then click on project plan for details. <http://www.wiki.karen.net.nz/index.php/ICBF>

Programme analysis

Methodology

We interviewed the Champions to find out whether REANNZ should continue to maintain the KAREN Champions programme. To do this we asked the Champions themselves about their successes and failures. We also asked whether it was useful to continue having the role in their organisation. All KAREN Champions have some level of access with the senior leadership teams and most meet with these teams regularly.

The findings of this report are based up interviews of the KAREN Champions at each of our core Members (the universities and CRIs).

After 19 interviews we selected the most useful highlights that would demonstrate the successes or failures of the KAREN Champions.

The following pages outline what worked well and where the challenges were for our KAREN Champions. The Universities and Crown Research Institutes experiences were distinct enough to treat them as separate groups in our analysis.

What worked well

Crown Research Institutes

“The [ICBF contribution] helped us to accelerate planned eResearch projects that would have otherwise happened more slowly. AgResearch sees KAREN as business as usual.”

Phillip Lindsay, CIO, AgResearch

Getting IT and KAREN Champions to work together accelerated the pace of KAREN adoption, especially with services like video conferencing. KAREN Champions raised the profile of their organisations within the community and provided networking opportunities with organisations that they do not normally work with. The whole concept of people having an additional role to actively explore and promote KAREN was useful. Having the same role in other organisations made collaboration possible.

KAREN Champions were a significant influence on senior leadership teams in favour of KAREN and eResearch. Many KAREN Champions gained permanent funding for their role with their organisations. At the same time, KAREN Champions were an excellent first point of contact and a link between

researchers and IT. They were effective lobbying for and training scientists how to use KAREN.

Funding from the ICBF was vital in providing the Champions with some 'validation' of the work they were doing and in providing a cost-code against which to charge their time.

The KAREN Champion is a useful label to have with the senior leadership team. At a strategic level the KAREN Champion role provided status on the science side to get things done in IT. This was done using KAREN site Champions at ESR as a way of providing more immediate and accessible engagement.

Universities

"Senior management are pleased with what has been achieved by Auckland and REANNZ working together."

Mark Gahegan, Director of Centre for eResearch, University of Auckland

The KAREN Champions were effective at pushing the KAREN brand at eResearch advisory groups and the senior leadership teams. It was useful having a KAREN Champion with a high level of credibility to influence with the senior leadership team.

The Champions were helped with this by the Institutional Capability Build Fund as projects funded by it identified obstacles and solutions for increasing KAREN usage.

Having a KAREN Champion in place to push departments towards eResearch meant that dozens of projects took advantage of KAREN earlier than if they had been left to their own devices. Additionally, having an eResearch Committee of some form made it easier for KAREN Champions to push the senior leadership team to support KAREN. Alongside these administrative efforts the Capability Build Fund projects challenged IT to sort their infrastructure for eResearch, especially video conferencing.

The many CBF case studies provided KAREN Champions with stories that showed the importance of eResearch to IT. Without the KAREN Champions these case studies would never have been sent to the right people.

In general, the Champions were an excellent point of contact and distributing information for KAREN issues within each University. The various REANNZ



hosted video conferences were helpful in raising technical skills in IT and showcasing New Zealand eResearch.

What could work better

Crown Research Institutes

"During ESR's installation of new video conferencing infrastructure was slower than it could have been. During this process ESR added IT people to the KAREN Site Champions because communication between KAREN Site Champions and IT was poor.

Val Orchard, General Manager Science & Research, ESR

Initial communication between research and/or education-centred KAREN Champions and IT was poor. It took longer than expected to roll out the training, communication, and awareness of video conferencing than was planned.

CRI's are small organisations and it is very hard to keep people's attention on KAREN. Science support through funding bodies does not support eResearch projects. There was almost no staff time to step back from science to think about eResearch. The senior leadership team was so busy putting out fires that they virtually no time to think about KAREN and eResearch. External research funding cycles are long and therefore opportunities to change the way current science is done are limited.

CRI's lack the dedicated depth and breadth of eResearch infrastructure and staffing. The CRI's have very little slack staff time or resources for eResearch. To CRI IT staff, eResearch is not a core area.

Some CRI's were not able to fund a permanent KAREN Champion and had too little time to spare for promoting KAREN. It was difficult to bring the researchers to eResearch and KAREN events because some staff assume KAREN is an IT issue and not relevant to them. Too many researchers are developing isolated tools that are not integrated into an eResearch infrastructure.

Universities

"KAREN Champions need to be paired with someone from or with close access to the senior leadership team of their institution if they are going to be effective."

Nathan Gardiner, University of Canterbury

The Universities provide varying levels of support for both the KAREN Champions and eResearch strategy. This difference makes it more difficult for



KAREN Champions to collaborate across organisations. Those universities with clear eResearch strategies have more researchers and tools that take advantage of KAREN and in general higher levels of eResearch skills and awareness.

Furthermore, a lack of time for the KAREN Champions time to do their roles slowed down the adoption of eResearch methods. One example of role conflict is that KAREN Champions from senior roles are clearly influential but their heavy time commitments can prevent them from carrying out the role effectively. In general, busy staff in research and IT often do not have the time to discover the eResearch tools and projects that already exist within their institutions.

Additional examples of what could work better include:

- Some KAREN Champions struggled with their lack of senior executive support within their University.
- Researchers often had no idea what IT could do to support them in eResearch. Some researchers spread the myth that they will be expensively charged for commodity internet if they do not use KAREN. Many were not sure if they are on KAREN and choose not to do eResearch as a result.
- New Zealand does not have an integrated eResearch infrastructure.
- It was difficult to find or keep appropriate eResearch staff working at each institution.


Recommendations

Overall

We recommend that REANNZ continue to support the role because of what the KAREN Champions have achieved to date and the low level of direct financial cost to REANNZ.

Detailed

- That REANNZ facilitate a series of regional events to support the KAREN Champions efforts to build eResearch capability and awareness of KAREN's value.

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- That REANNZ provide, where it can, more regular information about KAREN including case studies, services, financial matters and network operations. This information should also be sent to Members of the senior leadership teams along with the Champions.
 - Make KAREN Champions aware of isolated eResearch tools and staff across our Members.
 - Ask each Member eResearch group to hold a joint meeting with another Member via video conference to discuss integrating or sharing of scarce resource and to re-enforce the message that KAREN is about eResearch and not just IT operations.
 - Coach KAREN Champions to be more active in promoting KAREN and eResearch, eg by suggesting they organise small scale internal events.
 - Offer support from REANNZ for events and requests for information. Use the KAREN wiki to document successful Institutional Capability Building (CBF) efforts.
 - Circulate and update an online KAREN event calendar for our KAREN Champions.

Non KAREN Champion programme

We uncovered some more general feedback points in our interviews, eg

- there was call from some Members for REANNZ to assist in an “IT audit” to help Members accelerate the integration and adoption of KAREN.
- a desire from some Members for more regular financial reporting and communications on the financial aspect around KAREN.

These observations have been passed to REANNZ management.