Attachment 6.2: Administrative Director Consultancy Visit Guidelines

Administrative Director Consultancy Visit Guidelines

National Science Foundation Engineering Research Centers (ERC) Program

Introduction

The purpose of the Administrative Director (AD) Consultancy visit is to provide support and management insight to the new Engineering Research Center AD and leadership team. Two experienced ADs travel to the ERC Lead Institution to review best practices and offer suggestions for efficient Center administration and management. The timing of the visit is important, and it should be scheduled a month or two after the cooperative agreement is awarded and prior to the first Annual Report due date for new Centers. Existing Centers may experience AD staff turnover, and in that case, one additional visit may be scheduled at a time that is convenient for the Center.

The new AD should develop the agenda in conjunction with the consultants during an initial conference call and then follow up regarding logistical details. The visit should be tailored to the needs of the Center and the experienced ADs can then serve as a resource during the life of the Center.

Participants

It is critical to include a meeting with the Center Director (and the Deputy Director or Executive Director) when planning the agenda for the Consultancy Visit. Additional participants could include other members of the leadership team involved in management systems such as the, Industrial Liaison Officer and the Education and Outreach Program Director. Since institutional support is so important to an ERC, it might also be useful to schedule time with Sponsored Programs or business office staff.

Agenda

The one day agenda should accommodate the needs of the Center. The new AD should set the priorities as far as timing, participants and topics so that immediate concerns of the new Center can be addressed.

Typical issues include:

- Authority and Responsibility of the Administrative Director

- The Role of the Administrative Director in the ERC's Leadership Team

- The AD community – Google groups listserv

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Management functions, staffing and workload

- Resources and references

- Accounting and Financial Management

- Management of sub-awards

- Contract administration and compliance

- Data Collection and ERCWeb

- Annual report planning and guidelines

- Acronyms and definitions

- Site Visits and event planning

Reporting

The consultants will provide a feedback report to the ERC's Program Director, Director of the ERC Program and the Manager of the Post-Award Oversight System. However, this report is <u>not</u> an evaluation or a review. Observations, suggestions, challenges will be noted and the report can be shared with the Center Director if requested.

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