

ILO / SPI Onboarding Curriculum

The following are core competency topics (“modules”) to be covered with new ILO/SPI hires. Each module will be delivered by a relevant subject matter expert/s, either over zoom, conference call, or in-person meeting. The program’s goal is to provide all required modules over the course of 6 months (about one module offered per month). Other ILOs may take advantage of attending these modules as well, either for their own learning or to share their own experiences and expertise. The mentor program manager will coordinate, schedule, and host these events.

In parallel with these events will be mentor/mentee check-ins to address center-specific education and issues. In addition, optional ‘elective’ modules may be offered depending on the background of the new-hire ILO/SPI as well as interest level of the group.

The first 5 modules are required, the remaining are optional based on new hire’s background, interest, and role specifics.

Module	Module Type	Subject Matter Experts
First Orientation Call	Required	Mentor and Mentee Call
ILO/SPI Role within ERC	Required	Peter Keeling
IAB Management	Required	Peter Keeling, Chris Finberg, Scott Ransom
IP and Tech Transfer	Required	Tom Dudley, Ernie Davis
Site Visit & Annual Report	Required	Deborah Jackson
Entrepreneurship	Elective	Schaffer Grimm, Peter Keeling
MarComm	Elective	Wayne Gillam (CNT)
Diversity & Inclusion	Elective	Trisha Belfry, Teresa Chapman, Scott Bellman, other experts from ERC to help as SME’s
Sustainability	Elective	Scott Ransom, Peter Keeling

Module Details

First Orientation Call

In this initial conversation between mentor and new ILO hire, the mentor will get a sense for the new ILO/SPI’s background and learn center specifics, while also sharing their own background and expertise. The mentor will also review the plan for completing the modules and set expectations for frequency of communication and vehicle (phone / zoom / in-person). The program manager may also attend this initial call. This event is usually held prior to or in conjunction with the Elysium consultant visit at the ERC.

Elysium Consultation Visit

Though not a formal part of the Mentoring program, this in-person visit with Erik Sander and another veteran ILO provides fundamental knowledge about serving as an ILO/SPI at an ERC. Erik and his team will meet with not only the new ILO/SPI but also other center staff to build a solid understanding of the center’s mission and function, identify challenges, and provide

direction for the ILO/SPI. The visit results in a report outlining recommendations that is shared with the new ILO/SPI and NSF.

ILO/SPI Role within the ERC

The focus of this event is for the SMEs to review for the group the ILO/SPI's role within the ERC. Specific topics may include the following:

- Administrative Mgmt
- Leveraging Campus Partners
- Stakeholder Management
- Student Engagement

IAB Management

The Industry Advisory Board, Innovation Partners, and other key stakeholders are important components of an ERC's Innovation Ecosystem. This module develops an understanding of the following key topics:

- Innovation Ecosystem
 - Defining it
 - Strategic management
- Membership Recruiting
- Membership Benefits & Value; Membership Targeting and Plan
- Industry member coaching (SWOT, etc.)
- Meeting planning, structure, protocols

Intellectual Property and Tech Transfer

IP is instrumental in moving technology from academic research to societal impact. This module discusses definitions of IP, the role of IP at an ERC, and how ILO/SPIs can work with tech transfer office to maximize center innovation.

Site Visit and Annual Report 101

Preparing for the NSF's Site Visit Team and contributing to a center's annual report are key functions of an ILO. This module helps prepare an ILO/SPI for their first site visit by covering the following topics:

- Preparing for the Site Visit
- Site visit questions
- Land mines
- NSF Nomenclature

Entrepreneurship

As ERC's create spin-out companies from its research, ILO/SPI are often called on to provide guidance. This module discusses entrepreneurship from an ERC perspective and how those at the center can identify new opportunities and help fledgling companies get off the ground. *This is an elective module.*

Marketing and Communications

At some ERCs the ILO/SPI role is responsible for creating press releases, managing the center's website, and ensuring that accomplishments are broadcast to stakeholders. At other centers dedicated marketing personnel are tasked with these functions, whether internal to the center or outsourced. Either way, this module will provide the attendee with an understanding of how to effectively get your ERC's message across to those who need to hear it. *This is an elective module.*

Diversity and Inclusion

Diversity and inclusion constitute one of the cores of an ERC. Although a diversity director is usually responsible for executing on the center's mission for diversity and inclusion, the ILO/SPI is often involved in this process and a partner to the team. This module discusses best practices in running a diversity program at an ERC and how other stakeholders can participate in, and benefit from, these programs. *This is an elective module.*

Sustainability Planning

Almost all graduated centers report that "it is never too early to start planning for sustainability." But finding the necessary support and developing a sustainability plan that enables an ERC to function after graduation from NSF funding is no small task. This module discusses some of the challenges and pitfalls of sustainability planning as well as approaches that have succeeded in the past. *This is an elective module.*