



Annual Reports Industry Day NSF Site Visits

January 2024

Deborah Jackson, Scott Ransom

- Why Reports & Site Visits are Important Deborah Jackson
- NSF Perspective on AR & SV Deborah Jackson
- The Annual Report 101 Scott Ransom
- Site Visits & Industry Day 101 Scott Ransom

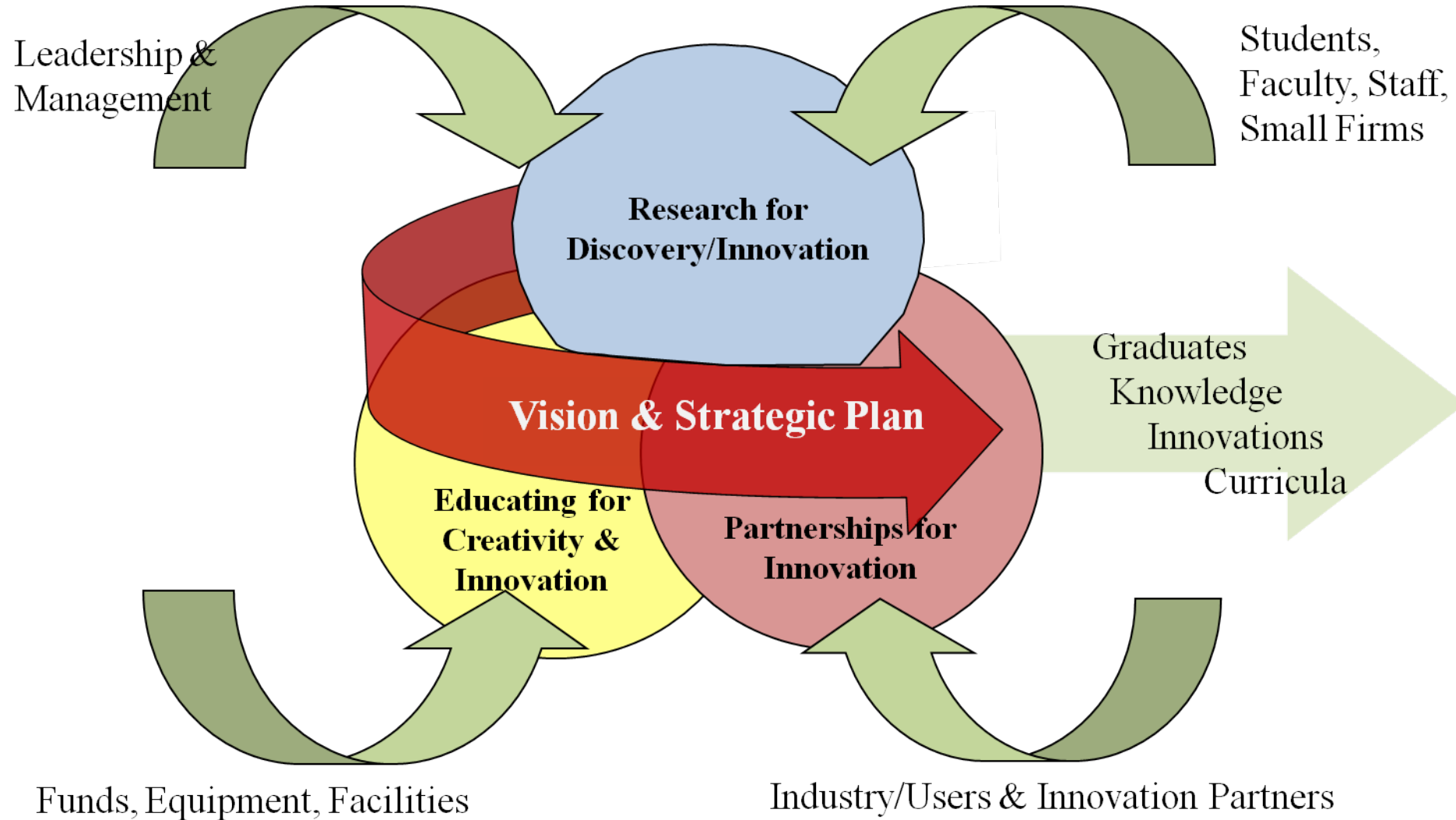


ERC

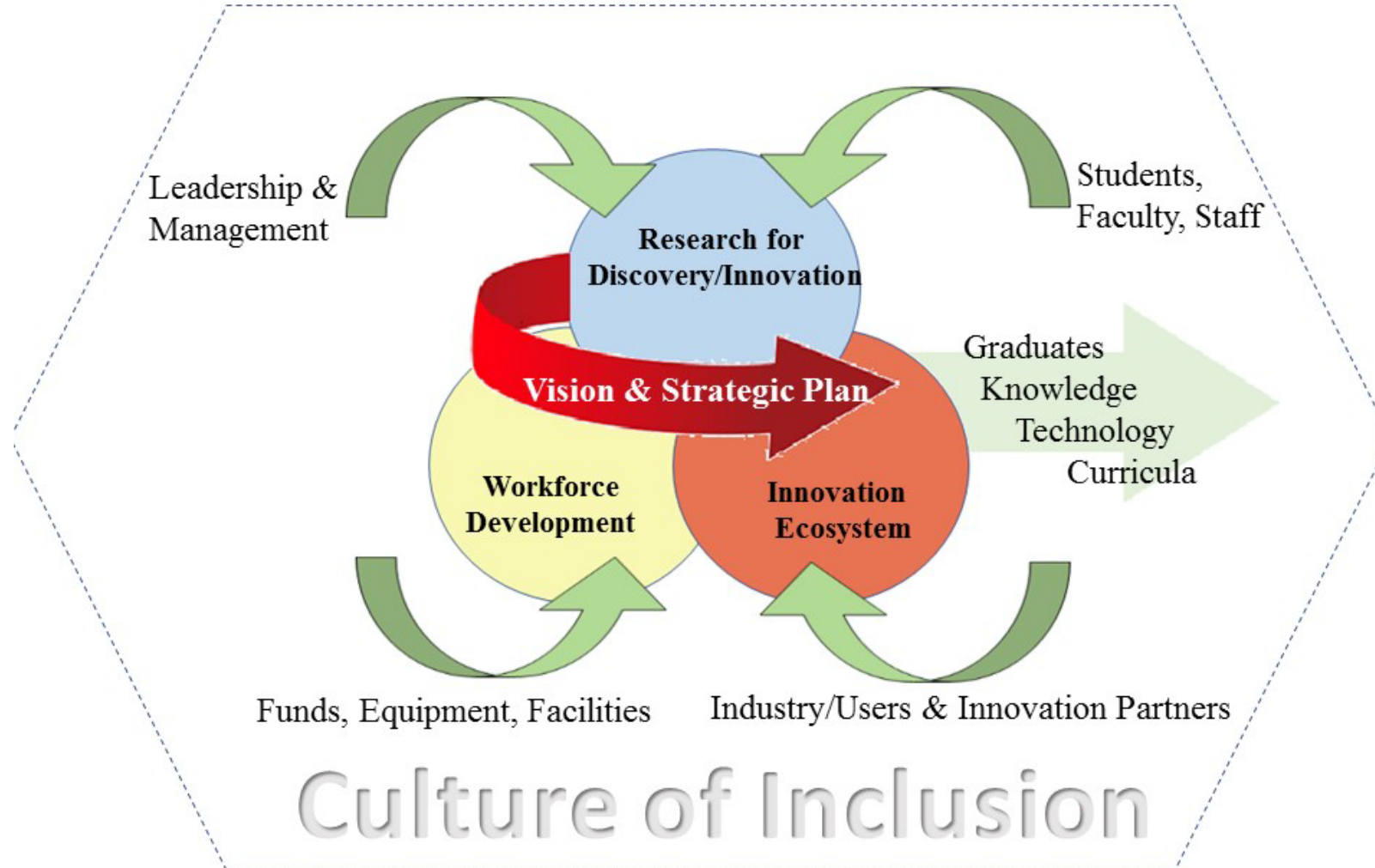
Engineering Research Centers

January 26, 2024 ERC Mentor Call

Deborah Jackson, NSF Expert



An NSF Engineering Research Center: A Complex, Interdependent System



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 - Second level
 - Third level
 - Fourth level
 - Fifth level

Site Visit Report template: Innovation Ecosystem

Review Criteria, Years

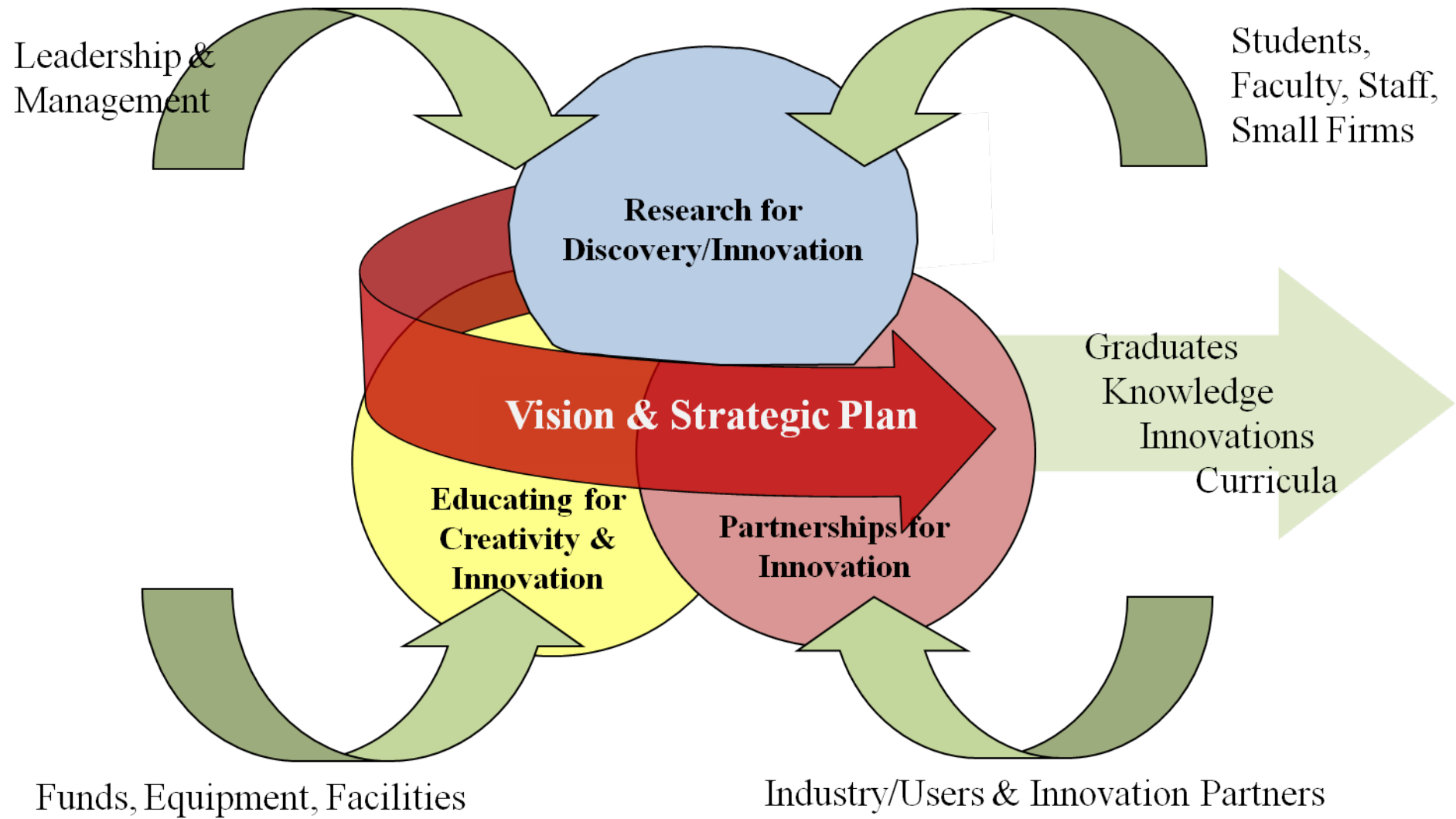
- Innovation Ecosystem: Construct is strong with active member firms/practitioner partnerships, strong benefits to member firms
- Membership Agreement: Structures the industry collaboration program with clear statements of fees, benefits, and intellectual property policies that promote technology transfer
- Membership: Growing or stable group of members across the value chain appropriate for systems vision; Members strongly committed to supporting the ERC after graduation
- IAB: Active and effective; meets twice per year; SWOT process yielding cogent advice
- Industry Partnership: Industrial collaboration is a cooperative partnership that is integrated into planning, research, and education activities

Site Visit Report Template: Innovation Ecosystem Review Criteria, Years (cont'd)

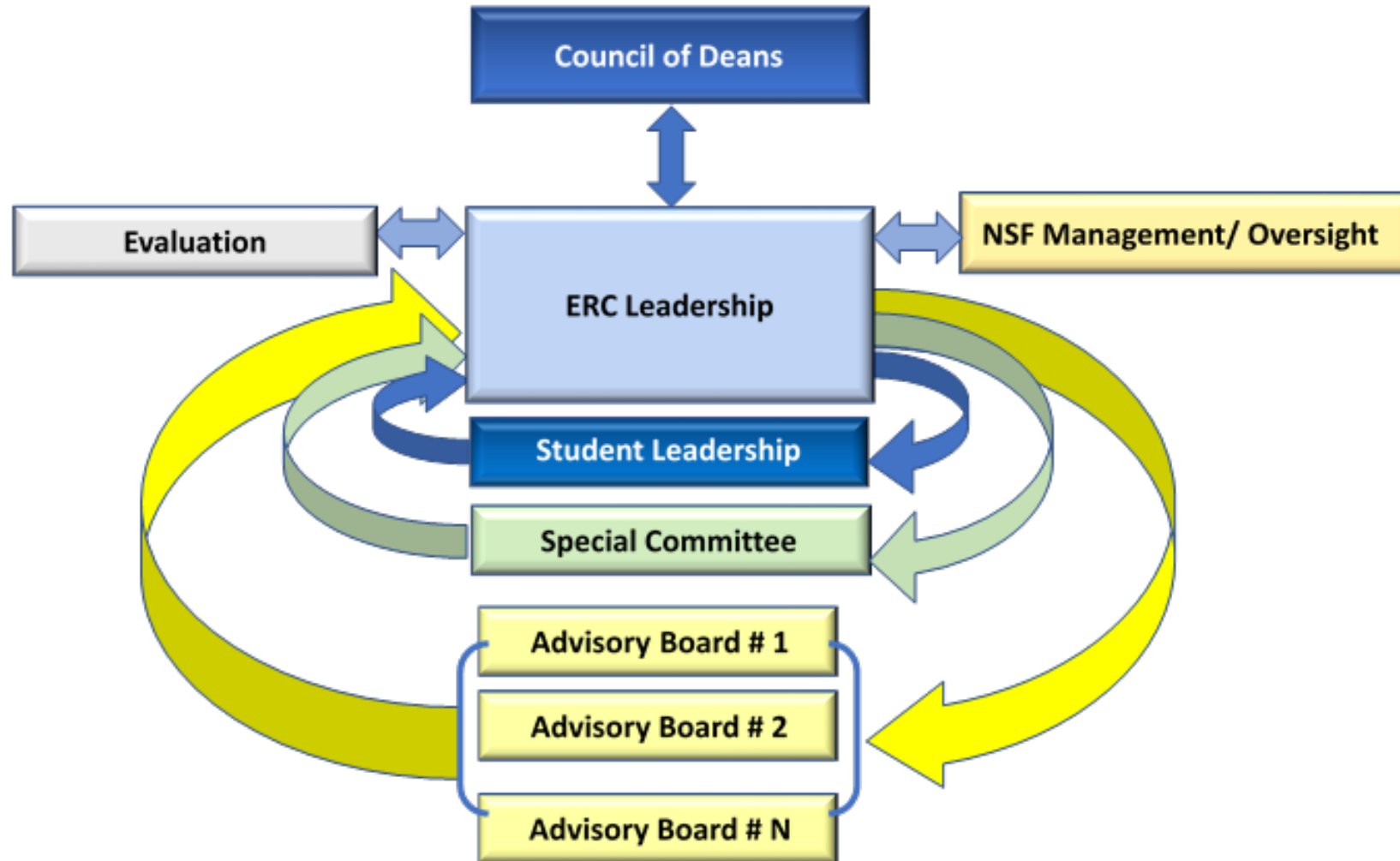
- Membership Fees: Provide discretionary funds, and commensurate with typical investments in academic R&D for the sectors represented by the firms involved; sound basis for self-sufficiency
- Technology Transfer: Knowledge and technology transfer is significantly impacting industry/practitioner members through sponsored projects and other teams
- Small Firms and Translational Research: Translational research is underway with small member or non-member firms if member firms do not license the ERC's IP, sound conflict of interest policy
- Entrepreneurship: State or local government, or other innovation/entrepreneurship partners effectively engaged and helping to speed the innovation process

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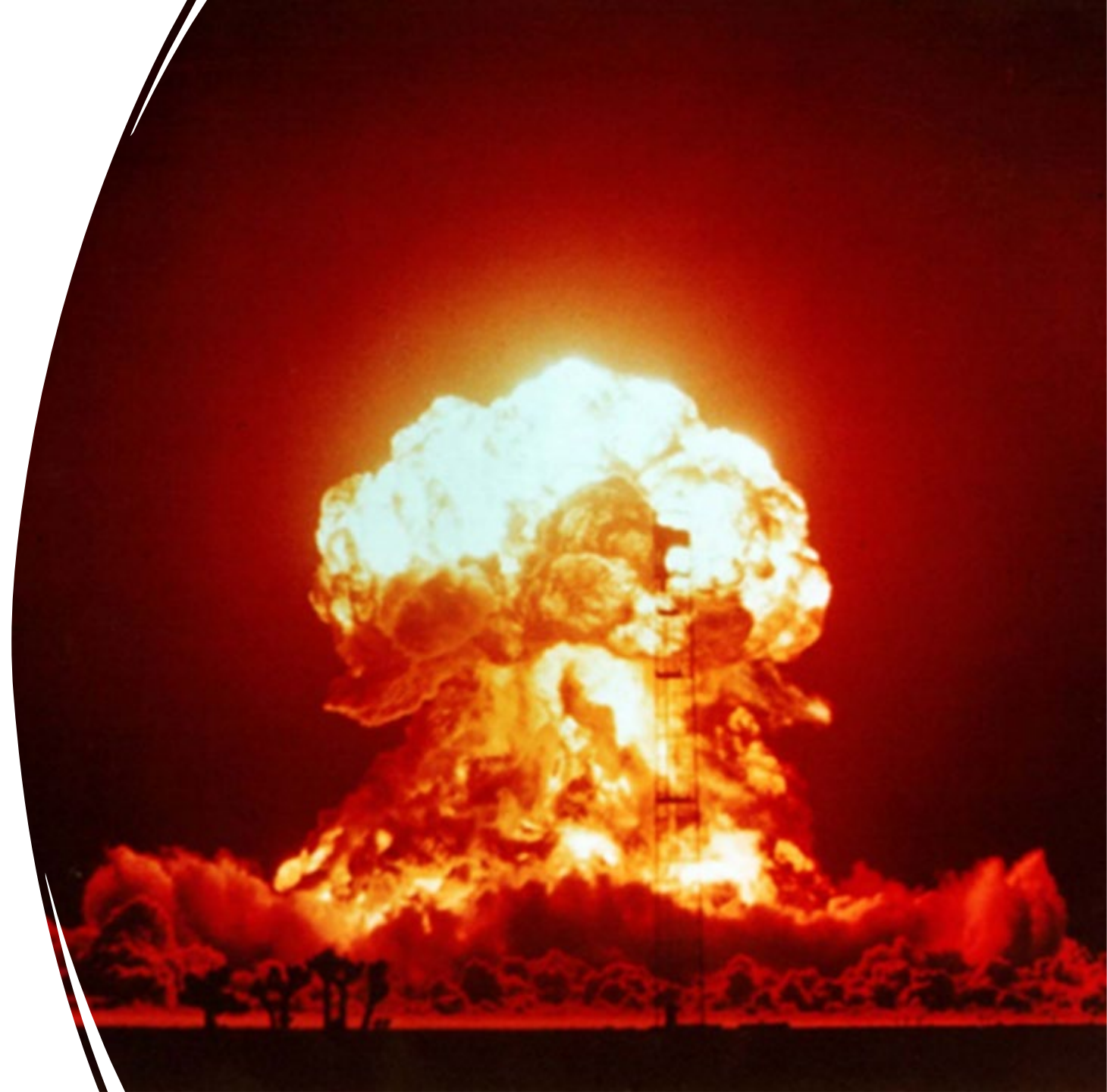
<u>Key Features</u>	<u>Annual Report</u>	<u>Site Visit Report</u>	<u>Database Tables</u>
Transformational Engineered Systems Vision	Systems Vision and Value Added/ Broader Impacts of the Center	Executive Summary	ERCWeb Table 1, ERCWeb Table 1a
		Intellectual Merit	
		Broader Impacts	
		SWOT	
		Vision and Impact	
3-Plane Systems Motivated Strategic Research Plan	Strategic Research Plan and Overall Research Program	Strategic Research Plan	ERCWeb Table 2
Inter-disciplinary Research Program		Research Thrusts and Testbeds	ERCWeb Table 2, ERCWeb Figure 2a
University Education Program	University Education Program	University Education Program	ERCWeb Table 1, ERCWeb Table 3a, ERCWeb Table 3b
Pre-college Education Program	Pre-college Education Program	Pre-college Education Program	ERCWeb Table 1
Innovation Ecosystem	Industrial Collaboration with Member Firms	Innovation Ecosystem	ERCWeb Table 4, ERCWeb Table 5, ERCWeb Figure 5a, ERCWeb Figure 5b, ERCWeb Figure 5c; Patents and Licenses Table*
	Strategy for Implementation of Innovation Ecosystem		Technology Transfer Table*, ERC Start-Up Firms Table*
Infrastructure	Infrastructure	Infrastructure	
Configuration & Leadership	Configuration & Leadership	Configuration & Leadership	ERCWeb Table 6, ERCWeb Table 7; ERCWeb Figure 6a, ERCWeb Figure 6b, ERCWeb Figure 6c
Diversity	Diversity	Diversity	ERCWeb Table 7, ERCWeb Table 7a, ERCWeb Table 7f; ERCWeb Figures 7b-7e
Management Systems	Management Systems	Management Systems	ERCWeb Table 8, ERCWeb Table 8c, ERCWeb Table 10, ERCWeb Table 10a
Resources, Commitment	Resources, Commitment	Resources, Commitment	ERC Web Table 9, ERCWeb Table 11



Managing ERC Complexity



Possible Outcome of a Site Visit



- **Timing**

- Deadline, work backwards. Usually 6 – 8 weeks to write
- Factor in OSP Certifications

- **SWOT**

- Connect with IAB Chair
- Schedule IAB Call

- **Innovation Ecosystem Section**

- Leverage Existing
- Update

What Impact is the ERC Industry Program Making?

- **Other Sections**

- Track Highlights throughout the year

- **In General**

- Collaboration
- Timing
- Reviewer for other sections – consider your bandwidth
- Work Closely with the ERC-Web tables

- **Impacts of COVID**

- More limited engagement opportunities
- Recruiting changes – conference attendance, lab visits, etc.
- Virtual Collaborations on the writing

- **Industry Day**

- The day prior to the Site Visit
- PLAN in advance...your day to shine!
- Value-Added for Industry Members
 - Build Network between CNT and Industry
 - Ensure Industry knows about our Research
 - Brainstorming opportunities for Collaborative Research
 - Meet the students – potential hires
 - Education opportunity for Industry Members
 - Project Momentum Opportunities for Industry Members
- Agenda....

Industry Day Agenda

Agenda and Breakouts



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Industry Day Breakouts

Planning Worksheet



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Additional Considerations

- YOU are in charge – Run the Day
- Prepping Faculty – not a “dry run” for NSF
- Engaging Students – Industry / Student Dinner
- Prepping IAB for SVT Closed-Door
 - What they should expect
 - Leverage IAB Chair, previous experience
 - No surprises
- Project Meetings
- Renewals coming up? Good time to remind
- Educational Opportunities
- Invite Institutional Partners
- IAB is your GUEST – host them well

Different than Industry Day

- Focus is on the SVT; IAB is still guest but also partner
- Broader Attendance
- Time is key

What Impact is the ERC Industry Program Making?

Prepare

- Rehearse
- Research the SVT

The Industry Update

- Rehearse your Industry Update
- Address items in SWOT, and from Previous SVT Reports
- Convey Quantitative AND Qualitative growth

Additional Considerations

- Leverage other ILOs for help
- Prepare
 - Research the SVT
 - Rehearse your Talk
- Get your IAB to their flights!!
- Send out Thank-you's
 - To Faculty and Students who presented
 - To IAB for coming, presenting
- Send out an Evaluation Form
 - Share results at Leadership Meeting
 - Review at the start of Industry Planning next year
- Have fun – and take a day off

COVID Considerations

- Virtual Site Visits & Industry Days
- Broader attendance
 - More reps
 - No budget issues
 - Include prospective companies, control member-only sessions
- Recordings Available
- More Difficult to Network
- Keynote Speaker – Industry Day option

- Hopefully a thing of the past

Questions?



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Questions?