



Site Visits for EPSCoR RII Track-1 Awards

Year-4 Projects in FY16

NSF EPSCoR PD/PA Meeting
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Site Visits (SV)

- **Post-award management & oversight of Cooperative Agreements**
- **Goals**
 - **Evaluate progress relative to project goals**
 - Panelists review all aspects of the project
 - focus on progress, impacts, value added
 - **Provide feedback to maximize project success**
 - Site Visit (SV) Panel's Report
 - Recommendations by managing PO



SV Roles

NSF EPSCoR

- Organizes and attends SV
- Reviews report and distills recommendations and required actions
- Follows up on responses to recommendations and progress



SV Roles (Cont'd)

SV Review Panel

- Reviews documents
- Listens to presentation, Leads Q&A sessions
- Discusses progress and feedback with project team
- Writes report that summarizes findings indicating strengths and weaknesses



SV Roles (Cont'd)

Project Director (with team members)

- Coordinates all details (both program and logistics)
- Communicates with NSF EPSCoR
- Organizes the team, and Participates in SV
- Reviews report and responds to recommendations
- Implements approved actions and reports on progress



Format

- **Site Visit** is a **FACA** (Federal Advisory Committee Act) **meeting held at host site**
- **Two and a half days event**
 - Day 1: Project presentations
(room capacity: 25 to 30 max, incl. panel)
 - Day 2: Student posters, Tour of project facilities,
Interactive discussions
 - Day 3 (morning): Panel writes Report
- **Agenda and logistics** finalized in coordination with EPSCoR and project leadership



Timeline

- January - SV Overview and Logistics Letter to PD;
Jurisdictional Logistics Team
- March - SV dates, venue finalized;
Program details and Tentative SV Agenda to PD
- May - Teleconference for logistics, agenda details
(meeting room, hotel, Visit to project facilities)
- June - Finalize SV agenda (Day 2 details), all logistical details;
Jurisdiction to send these info to NSF
- June to August - Jurisdiction and NSF prepare for SV;
- August- Sept - One week before SV: jurisdiction to send attendee
list; 3 business days before SV: jurisdiction to send
finalized presentation
- September - Site Visit at host site



Other Information

- **Site Visit Team**
 - External review panel (5-6 incl. one NSF disciplinary PO) and
 - NSF EPSCoR (2)
- **Jurisdictional attendees**
 - project participants (as appropriate for each session incl. facilities tour) and
 - members of jurisdiction's Steering Committee (max 2)



Documents to Review panel

- Year 3 project report (incl. evaluation report)
- current strategic plan for the project
- prior RSV report and responses
- current jurisdiction Science and Technology Plan
- solicitation, original proposal
- proposal reviews and panel summary
- award abstract
- award letter incl. PTCs



Features

- **Presentations** to showcase project results, accomplishments and impacts to date, planned directions, and sustainability efforts
- **Interactive Discussions** between panel and project team; **Executive sessions** for panel discussions and report writing
- **Student Posters** to illustrate supported student contributions to project and goals (15 max)
- **Tour of facilities** (both on-site and virtual) supported by or used in the current award to show infrastructure improvements



SV Agenda – Day 1

Team, Panel, & NSF (8:30am – 5:00pm)

- Introductions (Team, Panel, NSF)
- Team Presentation: Project Overview (45 + 15 min)
and Q&A
- Team Presentation: Research (90 + 30 min)
and Q&A
- Team Presentation: Project Elements (90 + 30 min)
and Q&A
- Executive Session (Panel, NSF) (60 min)
- Interactive Discussions (Team, Panel, NSF) (45 min)



SV Agenda – Day 2, 3

Day 2: Team, Panel, NSF (8:30am – 5:00pm)

- Student Posters (Students, Panel, NSF) (90 min)
- Interactive Discussions (Team, Panel, NSF) (75 min)
- Visits to Labs/project Facilities (4 hours)

(Details to be finalized in advance)

- Panel discussions and organization for report writing (Panel, NSF) (30 min)

Day 3: Panel & NSF

- Report Writing and Finalizing (8:30am – 12noon)



After SV

Managing PO

- Uses Panel advice to distill **Recommendations**
- Sends **Panel Report** and **Recommendations** with **Required Actions to PD**

PD (with project team)

- **Responds** to SV Recommendations
- **Communicates** with Managing PO and **follows up** as required



Presentation - Guidelines

Comprehensive presentations that

- emphasize **progress** with respect to stated goals, **accomplishments**, and **impacts** to date;
- integrated project elements (i.e., a **cohesive project**) to meet goals



Presentations (cont'd)

- Showcase project **results, accomplishments and impacts** to date, planned directions, and sustainability efforts
- Illustrate how **all project components** link cohesively to accomplish project goals and impart broader impacts
- Exemplify RII project's **uniqueness** in terms of **value added**



Presentations (cont'd)

Enable the panel to

- fully understand **all aspects** of the project incl. **connections** between various elements in meeting goals
- accurately **assess** project's current **status and progress**;
- draw informed conclusions; and
- provide **useful feedback** for enhancements and corrections to successfully complete the project



Student Posters

- Maximum of 15 posters – 90 mins for SV panelists to interact with students
- Showcase **student contributions to** and involvement in **this project** (grad, undergrad and secondary school student supported by this award)
- **Make it interactive** (e.g., demonstration of bench-top equipment or other products developed, modeling/ simulations or other results on a laptop computer; short overview for the session)
- Look for **creative ways** to highlight student contributions to the project and impacts on their STEM careers



Visits to Project Facilities

- 4-hr total visits (incl. back and forth transportation)
- **On-site** laboratories or other facilities acquired, supported, or used in the current project
- **Virtual** presentation of facilities at other project sites
- **Field-sites** instrumented or used for research in this project
- New **acquisitions**, broad/continued **use**, new/potential **collaborations**, and **impacts** on research and education **infrastructure** of the jurisdiction



QUESTIONS?



Thank You