



## 6.8 Event Management

Meetings play a vital part in the life of an Engineering Research Center. During the course of a year, a typical center will host industry meetings, external research reviews and retreats, advisory board meetings, faculty and staff meetings, seminars, workshops, short courses, and the all-important Annual/Renewal Site Review. Detailed planning and organization can contribute to a successful outcome and can also illustrate the professionalism of the center at all levels. The Guidelines for the Annual/Renewal Site Visit are in the [ERCWeb library](#) and they contain detailed information and a useful checklist.

[See Attachment 6.6 – Site Visit Checklist](#)

### **Key Considerations**

**Date/Location** – Set the date early to ensure there are no major conflicts with the ERC schedule, university academic calendars, major professional meetings, or holidays. Check on possible locations to ensure there is adequate space and availability to meet the objectives of the meeting. [Doodle](#) is a useful tool to poll your leadership team at each partner campus. Many centers find it useful to coordinate the timing of ancillary events with their main industrial meetings or with the Annual Site Review. This increases attendance and saves money and time.

***Tip:*** Consult with your NSF Program Officer months in advance to set the Site Visit date and be sure to check the schedule of Deans, Chancellors and Provosts at each institution.

**Attendees and Speakers** – Determine who should be invited and estimate numbers. If the center sometimes pays expenses for external speakers, clarify expectations in advance. Note that NSF and industry have placed growing emphasis on presentations by students and young faculty. Identify speakers, communicate expectations, and issue invitations as early as possible to ensure good attendance.

***Tip:*** Collect business cards during key events. This is an excellent way to update your mailing list, including new titles, e-mail addresses, and other contact information.

**Vendors** – If available, it is ideal to work with the campus conference planning office to organize large meetings. Identify campus departments and external vendors for services such as catering, audiovisual, computer support, and transportation providers and reserve meeting rooms as soon as the date is set. Outside vendors may require significant lead time, so secure contracts and inquire about preferred and/or negotiated rates. Site reviewers and industrial personnel appreciate access to labs and students, so keep this in mind when considering location for meetings that include those individuals.

**Agenda** – Encourage faculty and industry leaders to collaboratively plan the purpose and agenda for meetings when possible. This will increase buy-in and participation. Consider travel time and the meeting objectives when choosing a location and developing the agenda. It's best to send a final version to all attendees as early as possible and minimize distribution of draft versions.

***Tip:*** Be sure to include breaks between sessions, where participants from several thrust areas can meet together. Some of the best interactions happen during the breaks!

**Budget** – Confirm the budget, including funding expectations for meals, travel, and supplies. Ascertain the availability and necessity of discretionary funds for payment of honoraria and determine if a registration fee is required. Alcohol is not an allowable expense, so look into options for industry sponsorship or a cash bar if this is important for your meeting.

**Timetable** – Create a project plan with a timetable for any major meetings. Identify tasks and deadlines, assign responsibilities, and decide if rehearsals or dry runs are required. Be sure to distribute the timetable to the appropriate participants and schedule regular check-ins. A written checklist is invaluable and it's also important to plan backup systems and reconfirm all arrangements a day or two before the event.

***Tip:*** You can never have too many helping hands at a large event or meeting. Faculty, staff, and students can all



*play a role in organizing and executing an event. A well-chosen graduate student escort can often make a great impression on an industrial or NSF site visitor.*

Handouts – Prepare and distribute general logistical information, information packets, public relations materials, copies of slide presentations, attendee lists, and name tags as warranted.

### 6.8.1 Site Visit Tips

In addition to the responsibilities noted in the guidelines –

- Be sure to offer a healthy and varied selection of good food and accommodate special preferences.
- Don't minimize the importance of comfortable chairs.
- Cohesive presentations may require a red team and IAB or SAB review – build time for this into the schedule.
- Plan for a “dress rehearsal” in the actual space if possible and test the AV equipment, the timing, and the order of the presentations.
- Set a deadline to collect all final slide presentations in order to print and make copies for the Site Review Team.
- Stock up on supplies and be sure to have extension cords, power strips, USB sticks, and even umbrellas available.
- NSF site review teams will ask to meet privately with students and advisory boards (i.e., industry, scientific, professional). Make sure that all understand their role within the ERC.

### 6.8.2 After the Meeting

Allow time for the natural “letdown” after a major event, but do plan for a post-meeting wrap-up session with staff. Gather feedback and note suggestions for future meetings and document details. Don't let down the meeting momentum until all of the following tasks have been accomplished:

- Pay speakers and reimburse faculty and staff.
- Edit and distribute minutes (or other follow-up materials).
- Update databases (industry, students, etc.) with appropriate information.
- Prepare final expense report and update the budget for future events.
- File all copies of meeting information and handouts in the master files.



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- Send thank-you notes – acknowledge those who did an excellent job.

**Tip:** *It's useful to keep final versions of the agenda, participants list, handouts, minutes, venue information and prices, etc., for each major meeting. This allows you to delegate more effectively the next time around.*

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