



# Annual Reports, Site Visits, and Industry Days

ILO Module

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- Why Reports & Site Visits are Important
- NSF Perspective on AR & SV
- The Annual Report 101
- Site Visits 101

- Why this is important
  - Panel recommends funding decision
  - Chance to identify issues with Center
  - Ensure congressional funds are spent well / stewardship
  - Opportunity to give feedback and direction to Center
  - Should be collaborative, but can be adversarial
  - Careful planning can help it be the former

## Characteristics of a Good Ecosystem

- **Innovation Ecosystem is Strong with Active Members, strong benefits to member firms, translational research is having an impact, partners devoted to innovation are engaged**
- **Center-wide Membership agreement**
- **Growing or Stable group of members across the VC**
- **IAB is active and effective w/ SWOT process yielding cogent advice**

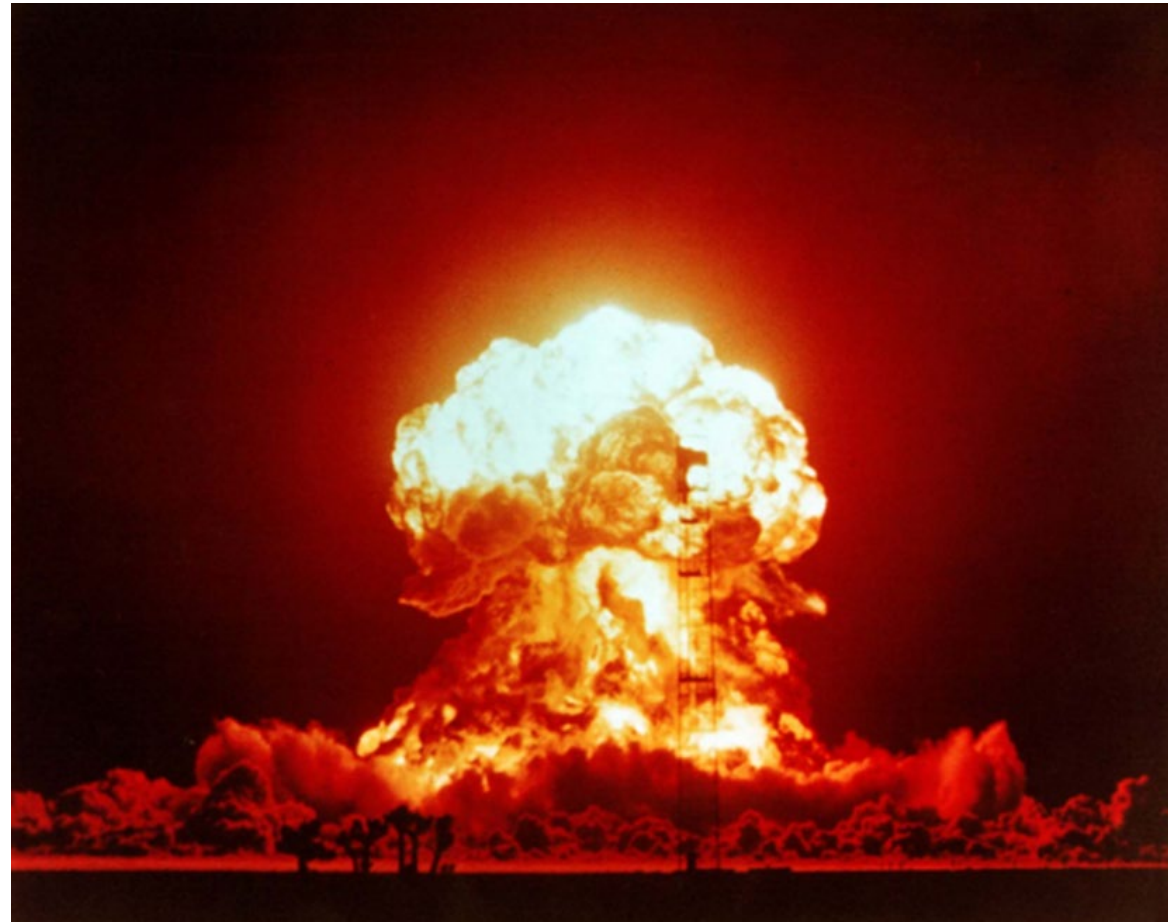
## Characteristics of a Good Ecosystem (Continued)

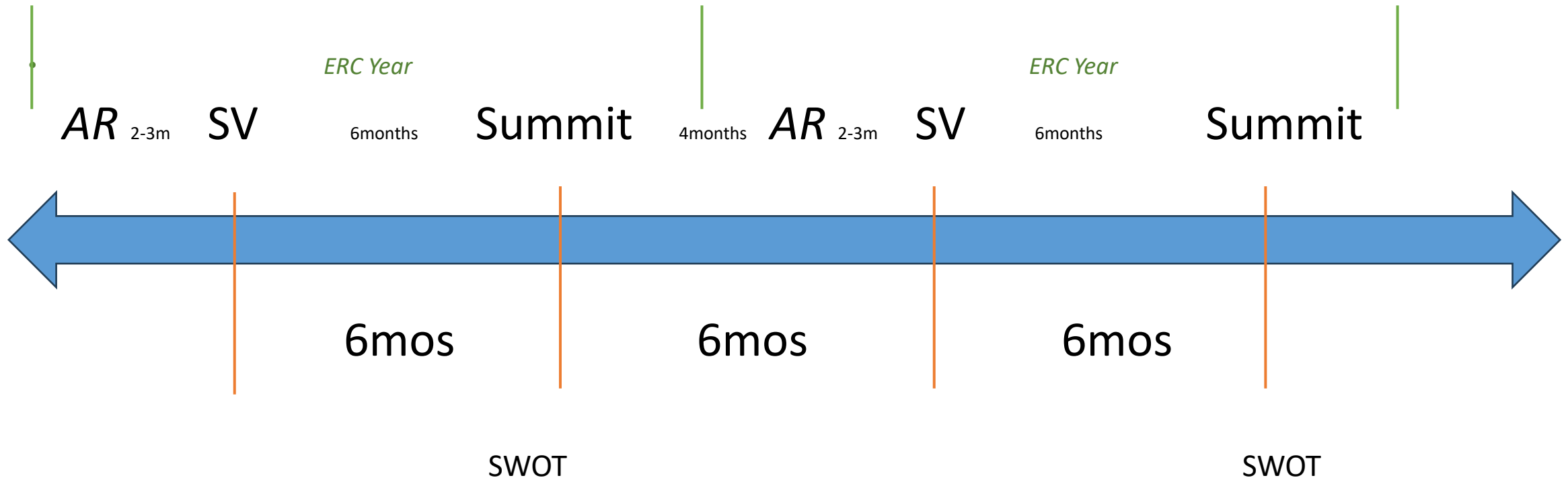
- **Membership fees provide discretionary funds for the ERC**
- **Tech transfer is impacting industry / practitioner members through sponsored projects and other means**
- **Translational research is underway, licensing**
- **Innovation / entrepreneurship partners are engaged**
- **Industrial collaboration has become a cooperative partnership that's integrated in the ERC's planning, research, and education activities**

## Characteristics of a Good Ecosystem (Continued)

- The ERC has identified a holistic list of different stakeholders that would potentially contribute to and/or be impacted by the technologies developed in the Center
- Feedback loops are in place for engaging stakeholders in the co-development of innovations
- Regular, clear communication; stakeholders informed of key decisions. ERC seeks two-way communication; stakeholders co-create communication norms
- Stakeholders participate actively in decision-making processes. Stakeholders enable ERC resources. Stakeholders may also be co-creators and hold shared power in planning and execution
- Stakeholder engagement is beginning to shape key outcomes. Value of stakeholders is clearly articulated. Stakeholders can be central to success; outcomes reflect shared priorities

- 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

- **Other Sections**

- Track Highlights throughout the year

**What Impact is the ERC Industry  
• Program Making?**

- **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**

- Not every center does them
- 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....

- **Agenda, Breakouts, and Planning Worksheet**

## •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

- **Similar to Industry Day**

- Focus is on Industry and Research Collaborations
- Broader Attendance – can include Innovation Partners (NDAs)
- Research Updates, commercialization, education

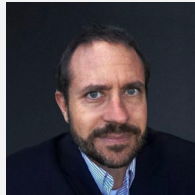
**Focus on Industry and Collaborations**

- **Prepare**

- Consider non-primary institution venue
- Survey Industry Members – what do they want?
- **Plan to do the SWOT**

- **Questions?**

# Contact



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