**IUCRC Planning Meeting Guidelines**

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# **The Planning Grant**

Key objectives for completion of Center planning activities are (1) to secure financial commitments from prospective industry members that meet or exceed Phase I membership requirements, (2) assemble a committed team of faculty researchers, and (3) identify a preliminary portfolio of industry-vetted basic research projects. The identified projects need to be at the frontiers of industrial knowledge creation addressing significant challenges, with potential to spur new technological innovations downstream. On successful completion of the Planning Grant activities, each institution within the proposed center could submit an individual proposal to form a new Phase I Center or to join a Center in its current Phase as a Site.

This goal of this document is to assist teams, who have received a Planning Grant, with the Planning Process and the information on best practices in holding a successful Planning Grant Meeting.

The Planning Grant Process - Key Roles

In addition to Center/Site PIs and NSF Program Directors (PDs), several other roles are critical in effectively planning and holding a successful Planning Grant Meeting Descriptions of these are found below:

* **Lead PI**: This person is designated in the IUCRC Planning Grant proposal as the prospective Center Director and PI of the Lead Site proposals. They are responsible for administering Center operations and centralized financial resources to ensure effective Center functioning.
* **Site PIs**: For multi-Site Centers, these are the PIs of the non-lead proposals from Sites participating in the Center.
* **Planning Team:**  The PIs of the proposals for all Sites (Lead and Participating) are designated the “Planning Team” for the purpose of this document.
* **Center/Site Personnel:** These are people who will serve as the PIs of the Site proposals for the Center and the faculty at their institution who will be associated with the Center. All have an important role in producing an effective IUCRC Planning Grant Meeting.
* **NSF IUCRC Program Director (PD):**  This person answers questions and provides guidance on solicitation-related questions and matters raised by Center/Site PIs. The NSF PD is only responsible for the parts of the Planning Grant Meeting components specifically assigned to them (i.e., the NSF IUCRC Program Presentation).
* **IUCRC Evaluator:** This NSF-funded individual reports to NSF on Center activities, achievements, and observations of best practices. The Evaluator is only responsible for parts of the Planning Grant Meeting components specifically assigned to them (i.e. LIFE System presentation and support of the LIFE discussion to be led by the PIs).
* **IUCRC** **Boot Camp Instructors/Coaches:** These individuals deliver the IUCRC boot camp training and coach Site PIs on best practices in the industry member discovery process and in Center value proposition creation.

# **The Planning Grant Process - Timeline**

Below is a typical timeline highlighting key milestones in the Planning Grant Workshop process. It provides the Planning Team with a suggested roadmap and schedule for carrying out a successful Planning Grant Workshop. A checklist that is useful for keeping all Center personnel informed of the schedule and tasks required for a successful IUCRC Planning Grant Meeting is included in the Appendix.

**1-4 Wks After Award Notification:**

**•** NSF assigns an Evaluator to interact with the Site PIs and start collecting data. The Site Personnel, the NSF PD, and Evaluator have a kick-off Meeting to answer Planning Grant award and Workshop questions and set expectations for the duration of the planning process.Site PIs participate in the NSF IUCRC Boot Camp.

**• The IUCRC Boot Camp:** A training workshop where the Planning Team meets with other funded cohorts and where participants are informed about the planning process and strategies for success. Topics also include discussion of the IUCRC model, best practices in member recruitment, and Center operations that are consistent with IUCRC requirements. Attendance at the IUCRC Boot Camp is required prior to submitting a Phase I proposal to establish a new IUCRC, unless a waiver is granted by NSF.

**4-6 Mo Prior to IUCRC Planning Grant Meeting**:

**•** Site PIs develop the prospective Center’s value proposition and define key industry segments based on findings resulting from the IUCRC Boot Camp customer discovery process and prior research on the targeted economic/industry sector. A minimum of 30 interviews per Site and an analysis of these findings is expected. This will help Center Participants develop and hone prospective research projects that involve multiple Sites and faculty and will appeal to a large number of potentially interested industry partners. Results of the customer discovery effort should be shared with all Center participants, so they can start to envision potential collaborative research projects that address targeted sector/industry needs.

**•** A list ofprospective members and notations as to the likelihood that they will come to the planning meeting and whether or not they are ready to join. It is critical at this stage to have identified enough potential members ready to commits so you have a good chance of meeting or exceeding NSF requirements at the Planning Grant Meeting.

**3-4 Mo Prior**:

**•** Site/Center Participants generate a list of potential Center members/sponsors to be targeted, cultivated, and invited to the Planning Grant Meeting. The Planning Team should keep a record of the efforts exerted in contacting and interacting with potential members of the Center’s initial Industrial Advisory Board. This document should keep a real-time record of where the Center and each Site in it is in the member recruitment process. This should include an estimate in terms of the percent likelihood of each potential member and their likelihood of attending the IUCRC Planning Grant Meeting and becoming a Center charter member. This list should be shared among all of the Site PIs and with the Center Evaluator.

**•** Site PIs and other Center Personnel participate in regular conference calls with one another, the number and time and date of which should be recorded and sent to the Center Evaluator. For single Site Centers, this would consist of meetings of faculty to discuss Center organizational and customer discovery issues.

**•** The Planning Team starts to develop their IUCRC Planning Meeting agenda and Planning Meeting logistics.

1. Identify potential meeting dates and verify that facilities are available for each.
2. Clear 2-3 potential dates with the NSF PD.
3. Poll key potential attendees (industry and local university) to identify which dates work best for the planning meeting.

**•** The Center PIs enlist the services of an experienced meeting planner to help generate industry-standard materials preparation and logistics and serve as the person handling registration and logistics for the meeting.

 **3 Mo Prior**:

**•** Site PIs distribute a common presentation template (see example on NSF IUCRC website) to Center Personnel and encourage them to (1) create cutting-edge, cross-institutional/disciplinary research projects that address sector/targeted, (2) put a pitch of their project into the template, and (3) establish a time limit for the presentation.

 **2 Mo Prior**:

**•** Teams of Center Personnel pitch their proposed research projects to their Center colleagues and, upon discussion, a suite of projects is selected that is deemed to be cutting edge and that best addresses the pain points revealed in the sector/industry discovery process.

 **1 Mo Prior**:

**•** Documents are created for the Planning Grant Meeting, including those for the selected projects specifying deliverables, milestones, timetables, budgets and project duration.

**•** Send apre-meeting reminder emails to all Center meeting participants (Center Personnel and prospective meeting attendees).

**3-5 Days Prior**:

**•** The meeting planner contacts all industry meeting attendees to remind them to bring their laptops to the meeting so they can carry out online project LIFFE and feedback forms in real time (Smartphones work too).

**2 days Prior and Day of the Planning Grant Meeting**:

**•** Prior to the start of the meeting planner conducts on-site testing of Internet connectivity. On Day 1 of the meeting have an IT person in attendance to troubleshoot as necessary.

# **The IUCRC Boot Camp**

The IUCRC Boot Camp is based on the successful I-CorpsTM program run by NSF, which has been adapted specifically for those wishing to start a successful IUCRC.

The IUCRC Boot Camp equips Site PIs with member recruitment strategies and Planning Grant Meeting strategies that will help PIs fulfill NSF’s IUCRC membership and membership fee requirements. The IUCRC Boot Camp reviews approaches and methods for:

1. Exploring the needs of potential industry members.
2. Developing compelling value propositions that will serve to shape the Center’s industrially-relevant research projects, vision, and objectives.

The IUCRC Bootcamp consists of:

* A pre-Boot Camp webinar to introduce participants to the IUCRC planning meeting process.
* Preparation for the in-person training session, typically held at NSF.
* One and a half-day, in-person, experiential training for key Center personnel focused on using Lean Launchpad® practices to create a Center membership strategy and execution plan.
* Out-of-class work during the training.
* Three to four virtual reporting and coaching sessions lead by IUCRC Boot Camp instructors to guide planning meeting teams in their industry member discovery process. This includes definition of a compelling value proposition, identification of customer segment targets, and development of a business model for the prospective Center.

An Evaluator is engaged to monitor the progress of the Site PIs through the coaching sessions that occur at and after the Boot Camp and help them benefit from best practices in the execution of a successful Planning Grant Meeting.

# **The IUCRC Planning Grant Meeting**

The IUCRC Planning Grant Meeting is typically a one and a half-day event. IUCRC Planning Grants are used to plan the joint industry and university research agenda and determine the feasibility and viability of developing a Center or for adding a new Site to an existing Center.

# **The IUCRC Planning Grant Meeting Agenda**

In this guide we present a typical Planning Grant Meeting agenda. This is a framework that can be used for successful Planning Grant Meeting preparation. Site PI’s have the ability to adjust this template and its execution to suit their needs.

**Planning Meeting Team Agenda Checklist:** The following is taken from Planning Grant Meeting Agenda recommendations on the NSF IUCRC Website and create a solid foundation for any IUCRC planning meeting:

* Prepare an introduction to the Center, its faculty, its capabilities, and its value proposition.
* Schedule time(s) and durations for presentation and discussion of the importance of Center-related research mission and capabilities.
* Schedule time(s) and durations for presentation and discussion of the importance of Center-related research mission and capabilities.
* Schedule time(s) and duration of discussions of LIFE forms to be completed after each research project presentation.
* Schedule time(s) and duration for LIFE feedback and discussion by industrial attendees.
* Schedule session for NSF-led discussion with IAB members to raise and discuss issues relevant to the Center research direction with the Center faculty/representatives.
* Schedule time for attendees to network with each other and with Center Personnel and students.
* Schedule time for a poster session/reception as an ice breaker at the end of the first day.

## **Day One**

**Center Vision**

Center vision and capabilities delivered by the Center Director or designee: A broad overview of the Center vision, value proposition, capabilities (human and infrastructure), and objectives that sets the stage for Center research projects and benefits. This should review key points from the Planning Grant proposal that was the basis of the meeting.

**Synopsis of the IUCRC Program**

Synopsis of the NSF IUCRC Program, the IUCRC model, and IUCRC benefits delivered by the NSF Program Director.

**LIFE System Introduction**

A brief introduction to the use of the LIFE (Level of Interest and Feedback Evaluation) System by the Center Evaluator articulating the Center project evaluation and voting guidelines.

**Center Research Project Presentations**

Presentations by team members and students of proposed project presentations on the IUCRC presentation template that outlines the project, its goals, objectives, activities, cost, timeline, and potential outcomes that research of the targeted industrial sector has shown to be of potential value to the industry members. From these, the IAB will select projects they feel are most responsive to their needs. Successful project presentation guidelines are presented below.

• **Slide 1** – Presentation title slide with faculty/students’ names (i.e., the team that will work on the project), project duration, and proposed budget.

• **Slide 2** –Industrial Need/Relevance

• **Slide 3** – Project Goals and Objectives

• **Slide 4** – Approach (Research Methods and instrumentation)

• **Slide 5** – Expected Outcome/Deliverables

**Note:** Having students make polished presentations of research projects in which they will be involved is excellent training for the student and a strong selling point in terms of talent scouting for IAB members:

Immediately after each presentation, prospective members evaluate the project using the NSF LIFE (Level of Interest, Feedback and Evaluation) form. Those filling out the forms should be told to complete the form from their and their company’s point of view and in terms of how much they feel their company would benefit.

**Industry Workshop**

This is an Industry focused session to foster discussion among industry representatives to crystallize significant needs/pain points that have not been adequately addressed in the sampling of research projects presented earlier in the day. This provides a vehicle that allows prospective members to express interests and needs and current issues the sector is facing as a whole and whether Center research projects adequately address their needs. The discussion should focus on the needs for the sector’s fundamental, pre-competitive research needed to provide innovative solutions to help solve issues or problems that are further downstream, and/or lead to new or improved products and processes. Ideas for projects that could be part of the Center portfolio but were missing from the Center personnel presentation should be identified.See the appendix for a collection of common practices on how to conduct this session.

**Poster Session**

Posters of projects already being done by faculty and students related to the theme of the Center and that have the potential to showcase Center intellectual and facility capabilities and pique the curiosity or interest of potential industry members in terms of being able to the needs that potential IAB members might find useful and that might make them want to join the Center as paying members. See the appendix for a collection of common practices on how to conduct this session.

##

## **Day Two**

**LIFE Feedback and Review**

This is an opportunity for open discussion between the Center and Site Directors, faculty, students, and industry representatives on the projects presented and on critical industry needs using the LIFE comments as a starting point. The goal of this session is to determine if prospective research projects energize and intrigue prospective members and if they address significant industry needs. If not, the Center team brainstorms appropriate projects with prospective Center membership. Design of this session is up to the team and potential members. See the appendix for a collection of common practices on how to conduct this session.

**Center Response to Feedback from Industry Workshop**

This session allows the Center to discuss how it will factor in the new input from industry into their proposed research agenda for the Center. During this session, the Center may present a revised schedule of projects and updated research roadmap that considers industry feedback and that the Center proposes to follow in its Phase I proposal.

**Note:** One important aspect of the planning meeting is open communication that allows Center participants (academic and industry) to freely share ideas, information, and their vision for the Center. The results of these discussions allow prospective industry members to fully understand the IUCRC process and the Center’s value proposition, providing them with important fodder to convince their organizations of the value of Center membership investment.

**IAB/NSF Closed Session**

This is a vehicle that allows the IAB and NSF, if present, to discuss issues and concerns members way want to raise and provide time to come to consensus on how they want to handle it or on the way forward.

**Next Steps, Action Items & Closing Remarks [Center Director,** Site PIs]

This is where the Center Director and his team summarize for the other attendees, the outcomes of the meeting, the plans for moving forward, and a timetable for any actions that need to be taken to achieve the successful creation of a new IUCRC.

Appendix 1

# **Sample Planning Grant Meeting Agenda:**

This is a typical Planning Grant Meeting agenda that can be used by Evaluators and Site PIs as a template for the elaboration of their agenda. Source: <https://www.nsf.gov/eng/iip/iucrc/planningGrantAgenda.jsp>

**Day 1:**

|  |  |
| --- | --- |
| 7:30 am7:30 - 8:15 am8:15 - 8:30 am8:30 - 9:15 am9:15 - 10:15 am10:15 - 10:30 am10:30 - 12:30 pm12:30 - 1:30 pm1:30 - 3:00 pm3:30 - 3:45 pm3:45 - 4:45 pm4:45 - 5:00 pm6:00 pm | Participant RegistrationBreakfast and Networking TimeWelcome Remarks (Center, site directors; university administration - Deans & VP Research level individuals preferred)Vision, Capabilities and Value Proposition of the Center (Center, Site Directors) NSF IUCRC Presentation (IUCRC Program Director)BREAKProject Proposal PresentationsLimit to 5 projectsList the project titles and time allocated to eachStrict adherence to presentation templateMake sure each project has clear milestone, deliverables for the first year and proposed budgetLeave adequate time for discussionLIFE forms for each project must be filled out (electronic and paper) prior to start of next presentationLUNCHProject Proposal PresentationsLimit to 5 projectsList the project titles and time allocated to eachStrict adherence to presentation templateMake sure each project has clear milestone, deliverables for the first year and proposed budgetLeave adequate time for discussionLIFE forms for each project must be filled out (electronic and paper) prior to start of next presentationBREAKIndustry Workshop (discussion of projects & company needs NOT addressed in the above Project Presentations)Review of evening and Day 2 activities (Center Director)Technical Forum and Networking (Poster session typical) |

 **Day 2:**

|  |  |
| --- | --- |
| 7:30 - 8:00 am8:00 - 9:30 am9:30 - 10:15 am10:15 - 10:30 am10:30 - 11:15 am11:15 - 11:45 am11:45 am | Arrival and BreakfastLIFE FORM feedback review and Discussion - (PI facilitated - All participants)Center Response to Feedback from Industry Workshop, LIFE (Center, Site Directors)BREAKNSF Closed Session with Industry (NSF and Industry)Next Steps, Action Items & Closing Remarks(All participants)ADJOURN (Box lunches typical) |

Appendix 2

# **LIFE Process - Guidelines & Steps**

The LIFE feedback process is not a project selection methodology but is meant to inform whatever project selection approach your center uses. The primary purposes are 1) Q&A time is usually limited and having member organizations provide written feedback allows everyone the chance to have input; 2) Written feedback gives PIs a chance to consider industry concerns and provide a thoughtful reply; 3) Feedback and replies can be debriefed as a group and help surface areas of agreement and disagreement and reach a consensus on the need for and feasibility of project changes. 4)Reviewing the interest rating distribution allows members to understand whether a few or many members are interested in a project and use this information to decide how to vote during project selection.

1. Website: [www.iucrc.com](http://www.iucrc.com)
2. Select Center Meeting:
3. Enter PW =
4. Select role: **Industry** for industrial participants or **Faculty** for faculty project leads (and students)
5. IAB
6. Click [Evaluate Project] and select a level of interest rating based on your firm’s needs and interests.
7. Provide comments, questions, and/or suggestions you have about the project. **The most valuable feedback is “actionable” comments like suggestions and questions that help the PI / student improve the project**. If you rated the project “Needs change” make sure to add a comment or suggestions on what needs to be changed or what needs to be done to get the project on course.
8. Enter your Name and your Organization.
9. SELECT SUBMIT AFTER EACH PROJECT.
10. Repeat for each project.
11. PI / Student
12. Read instructions and click [Continue to Response Page].
13. Find your project and select [Response to Comments]
14. Read comments provided by industry members and respond as necessary (not every comment may require a response).
15. SELECT SUBMIT AFTER RESPONDING TO EACH page of comments. (there is usually more than one page of comments so then continue to the next page).
16. Once you have completed responding to comments and submitted, scroll up to the blue links under the ratings to respond to the questions, and then the suggestions.

 7. Both

1. You can review the feedback and responses to each project by selecting [Summary] next to each project.
2. If you would like to review responses to all projects presented at the meeting, you may use the [Review Meeting] link at the top of the project list page (PDF and Word versions are also available).

Evaluators can view a [LIFE Form system tutorial (.PPT) for more information](https://www.nsf.gov/eng/iip/iucrc/LifeFormTutorial.ppt), including:

* Projects Cultivation and voting process
* Role of Faculty researchers versus role of the IAB
* Role of Sites and Center Director - how to be successful

Appendix 3

# **Industry Workshop - Sample Practice:**

The Industry Workshop is an opportunity for the prospective members to express their interests and needs in the Center. This step involves industry representatives discussing some current issues. Discussions can focus on some areas of general, pre-competitive investigation and technology development that would complement their internal R&D activities and help solve issues or problems leading to new or improved products and processes. An important outcome of this session is a discussion about potential projects that might be proposed which the group has not heard presented from the University.

**Sample Practice on how to execute the Industry Workshop:**

**Industry Workshop – Round Table Discussions**

Time: 1 hour

Facilitator: Industry Expert or Site PI appointed by Planning Team

Format: Round tables

Participants: All prospective industry members. NSF PD and Evaluator are there to observe. Faculty researchers can stay in the room, but they don’t participate in any of the discussions.

The Evaluator works with the Planning Meeting team to develop a 1-hour workshop for the prospective IAB Members. Often this workshop is focused on understanding what the IAB members are looking for that wasn't addressed in the presented projects. The NSF Program Director is usually involved in this process as observant or to answer any solicitation-related questions.

Industry Workshop (sample) Design:

The participating prospective IAB members are broken into groups (7-10 per table). Each table is asked to appoint a scribe and group reporter (they can be the same person). In some instances, the scribe can be a faculty researcher (this practice helps with information ownership and translation from the industry representatives directly to the center leadership- the faculty research is responsible for taking careful notes and not participating in the prospective industry members discussion). Each table is asked to have a 15-min. group discussion around three topics (questions) that are projected in the room:

Sample questions to motivate the discussions.

1. What is impossible to do today, that if it could be done by the center, would fundamentally change your industry for better?
2. What are the problems you wish you could solve (but do not know how to now)?
3. Given what you know, what broad research themes would you suggest the Center should consider focusing?

Upon completion of a 15-minute discussion, each table is asked to report out to the rest of the room (5 minutes per table). The reporter asks their table members if anything is missing from the report.

Appendix 4

# **Poster Session - Sample Practices:**

* If there will be posters, PDF’s should be included in the participant’s binder along with the Executive Summaries and PPTs of the project presentations.
* Students can be invited to give a 1-min pitch of the posters at the end of day-1 and before participants break out for the poster session. This is a way of inviting prospective industry members to visit the posters and engage with students. It is also excellent opportunity for students and the PIs hone their pitching skills to communicate complex research projects in simple terms and with clear value propositions.

# **LIFE Feedback and Review - Sample Practices:**

Level of Interest and Feedback Evaluation (LIFE) Forms are used at each NSF IUCRC Industry Advisory Board (IAB) Meeting and at the Planning Meeting. In Planning Meetings, prospective IAB members use these forms to indicate their level of interest in projects and provide additional feedback.

The [online LIFE system](https://iucrclife.chass.ncsu.edu/lifeforms/) allows centers to organize and display compiled industry interest ratings and feedback for each project presented at the meeting (anonymously to PIs, but not LIFE system administrators); and allow for PIs to respond to industry feedback (comments or questions).

**Sample Practice on how to execute the LIFE Feedback and Review:**

***LIFE Feedback and Review - Lighting Session***

*Goals of the session:*

* *Help shape the research agenda of the Center to meet industry needs*
* *Provide feedback to researchers as to how to make projects more appealing*
* *Help to strengthen proposals*

*LIGHTNING ROUNDS:*

* *2 LIGHTNING ROUNDS OF DISCUSSION*
* *5-6 PROJECTS A ROUND*
	+ *Round 1: Project 1-5*
	+ *Round 2: Projects 6-10*
* *25 mins PER ROUND*
* *After each Round – Report Out*

*Roles:*

* *Industry: Discuss LIFE for each project*
* *Reporters: Industry volunteers who take notes during discussion of each project and provide a brief summary of the discussion during report out – 12 projects total so need multiple volunteers*
* *Faculty: Listening Mode – may briefly respond to questions from tables during discussions or reporters when asked*

*Each Round:*

* *Part 1:*
	+ *5 MINS: Prepare quietly*
	+ *Read LIFE summary*
	+ *Pick a reporter to report out key conversation points for each project – worksheets provided*
* *Part 2:*
	+ *20 MINS: Lightning discussion – think about:*
	+ *What excites you about these projects*
	+ *What research gap(s) do these projects address?*
	+ *What would make these projects of much stronger interest to you?*
* *Part 3:*
	+ *1 Minute Lightening Report Out per project*

*Report Out Worksheet:*

|  |
| --- |
| *Project: 1. " Small Data & Early Indicators for Reliability Studies “– Peter Smith (sample)* |
| *Present out highlights of your conversation collectively* |  |
| *Note recommendations you have – for example combining projects/modifying projects etc* |  |
| *Conclude with - What’s missing that could be addressed that would make the projects more powerful and impactful*  |  |

*Report Out Process:*

* *Report outs done by project at the end of the round*
* *Each group reporter provides 1-minute report per project*
* *Note: PI’s are in listening mode. May respond to direct questions – limit response to 1 minute*

# **Appendix 5**

# **Planning Grant Process - Checklist:**

This template checklist helps in the planning of activities for the duration of the Planning Grant Process.

|  |  |  |
| --- | --- | --- |
| **Time** | **Activity** | **Notes** |
| **Soon after award notification (1-4 weeks)**  | NSF assigns and contracts an Evaluator to work the site PI’s. The site PI’s, cognizant NSF Program Director and Evaluator have a kick-off Meeting to answer Planning Award Process solicitation questions and set up expectations for the duration of the planning meeting process.  |  |
| **Well in Advance** **(4-6 months prior to meeting)** | Site PI’s (Planning Team) develop prospective Center’s Value propositions and define key industry members segments based on learnings from site-by-site IUCRC Boot Camp industry member (customer) discovery interviews  |  |
| **Well in Advance** **(3-4 months prior to meeting)** | Site PI’s develop a dynamic site-by-site listing of potential center sponsors identified in the boot camp process and that summarizes where each organization is in their recruitment process (include a percentage estimate for each potential sponsor of the likelihood of their attending the planning meeting and of their becoming a charter member). PI’s share this list amongst the site directors and center Evaluator |  |
| **(3-4 months prior to meeting)** | Site PI’s schedule regular conference calls for all site PI’s (doesn’t apply to single site planning meetings), local meeting planner(s), and center Evaluator. Start developing Planning Meeting Agenda.  |  |
| **(2-3 months prior to meeting)** | Site PI’s discuss Planning Meeting logistics: 1. ID potential meeting dates and verify that facilities are available for each;
2. Clear 2-3 potential dates with the cognizant IUCRC program director(s), and;
3. Survey/poll key potential attendees (industry and local university) to ID which dates will likely work best for the planning meeting
 |  |
| **(2-3 months prior to meeting)** | Site PI’s obtain the services of an experienced meeting planner to help w/ industry-standard materials preparation and logistics. That person should be assigned to the point of registration |  |
| **Pre-meeting: (a month prior to meeting)** | Site PI’s distribute common presentation template (w/ time specifications) to be used and adhered to by all project presenters (w/deliverables, milestones, timetable, budget & time limits) – Pre-meeting reminder emails are highly recommended |  |
| **Pre-meeting: (3-5 days prior to meeting)** | Meeting Planner email all industry registrants reminding them to bring their laptops (so they can complete their online project feedback forms in real time (Smartphones work too) |  |
| **Pre-meeting (several days prior to and on day of meeting)** | Meeting Planning conduct on-site testing of Internet connectivity. On Day 1 of the meeting have an IT person in attendance to troubleshoot as necessary |  |
| **Pre-meeting (several days prior to and on day of meeting)** | Verify these suggested elements:* Printed name tags w/ affiliations. (Table name placards, especially for industry are also good)
* In Binder and/or as handout: The Agenda
* In Tabbed Binder: List of Registrants - (industry, university) w/ contact information.
* In Tabbed Binder: University presentations.
* In Tabbed Binder: 1-page executive summaries and project PPTs in binders for all attendees.
* In Binder or as handout: Site director’s and faculty CVs.
* In Binder or as handout: Local “Connectivity Instructions”
* In Binder or as handout: “LIFE Access Instructions” (supplied by evaluator)
 |  |