

**Engineering Research Centers Program**

**Division of Engineering Education and Centers**

**National Science Foundation**

**FY 2013 Guidelines for an Engineering Research Center**

**Annual Review Site Visit**

**Engineering Education and Centers Division**

**National Science Foundation**

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The following guidelines will assist in the preparation for an Engineering Research Center (ERC) annual review site visit. They specify the preferred structure and process of the visit and must be followed by all ERCs undergoing annual review.

[I. PREPARATION FOR THE VISIT 3](#_Toc345679383)

[A. Confirmation of the Site Visit Dates 3](#_Toc345679384)

[B. Development and Confirmation of the Site Visit Review Team 3](#_Toc345679385)

[C. Submission of the Annual Report 3](#_Toc345679386)

[D. Distribution of Pre-Site Visit Materials to the Site Visit Review Team 4](#_Toc345679387)

[E. The Evening before the First Day of the Site Visit 4](#_Toc345679388)

[F. Hotel for the Site Visit Team 4](#_Toc345679389)

[G. Provision of Transportation on Site 4](#_Toc345679390)

[H. Meals 5](#_Toc345679391)

[I. Briefing Room, Executive Session Rooms, and Report Writing Room and Computers 5](#_Toc345679392)

[II. PREPARATION OF SITE VISIT BRIEFINGS AND MEETINGS 6](#_Toc345679393)

[III. AGENDA FOR THE SITE VISIT 6](#_Toc345679394)

[A. Suggested Agenda for First Day 6](#_Toc345679395)

[Items to be Included in the Agenda on the First Day 6](#_Toc345679396)

[1. Executive Sessions 7](#_Toc345679397)

[2. Overview of the Center 7](#_Toc345679398)

[3. Research Program by Thrust 7](#_Toc345679399)

[4. Lab Tours and Test Beds 8](#_Toc345679400)

[5. Poster Session 8](#_Toc345679401)

[6. University and Pre-college Education and Private Meeting with Students 8](#_Toc345679402)

[7. Industrial/Practitioner Collaboration, and Technology Transfer/Innovation and Private Meeting with Industry 9](#_Toc345679403)

[8. University Officials 9](#_Toc345679404)

[9. Executive Session at the end of the First Day 10](#_Toc345679405)

[10. Evening Work for the Site Visit Team and the ERC on the First Day 10](#_Toc345679406)

[B. The Second Day 10](#_Toc345679407)

[1. Breakfast and Discussions 10](#_Toc345679408)

[2. Site Visit Report Writing 10](#_Toc345679409)

[3. Departure 11](#_Toc345679410)

[IV. LOGISTICS AND OTHER ISSUES 11](#_Toc345679411)

[Summary of Site Visit Preparation Steps for ERC Administrative Director 11](#_Toc345679412)

# I. PREPARATION FOR THE VISIT

## A. Confirmation of the Site Visit Dates

The lead NSF ERC Program Director (PD) and the Center Director will determine two consecutive days on which the site visit will be scheduled. Please try to set the site visit date at least 10 weeks before the annual funding date, but before the end of June to allow sufficient time for the internal NSF review and award processing. The date should not conflict with the final examination schedules at the lead and partner institutions.

## B. Development and Confirmation of the Site Visit Review Team

The lead ERC PD will select the members of the site visit review team to include experts from academia, industry, and government with experience in the disciplines relevant to the ERC's research and education goals. The team members will be diverse in gender, race, and ethnicity and some will have been members of previous site visit review teams for the ERC. The final composition of the team is the responsibility of the lead ERC PD in consultation with the Leader of the ERC Program. The Center Director may recommend potential members of the team to the lead ERC PD. The ERC PD will eliminate candidates with conflicts of interest and determine the final composition of the team. The lead NSF ERC PD will provide a list of visitors to the NSF staff, the ERC Center Director and ERC Administrative Director (AD) not less than 8 weeks before the visit. The NSF staff will provide a logistics letter to the site team members with a copy to the ERC Administrative Director approximately six weeks prior to the site visit. The Administrative Director of the ERC should not contact the site visit team members until he/she receives the logistics letter. Once NSF staff has sent the logistics letter, the ERC AD will contact site visit team members to determine travel schedules, food preferences, and delivery format of the annual report.

The Center Director and other members of the leadership team and faculty may not directly contact the site visitors, since any such contact may give the appearance of an attempt to influence the outcome of the review. While the site visit team members may be colleagues of the ERC team members, the ERC must not schedule any social events with them before, during, or after the visit. If the Center Director becomes aware of any such social events between ERC Staff (including students) and any members of the ERC Site Visit Team, he/she will immediately inform the NSF ERC lead PD.

## C. Submission of the Annual Report

The ERC will write an annual report in accordance with the ERC reporting guidelines and submit it as directed therein. The report, in hard copy with accompanying CDs, must be received at NSF at least five weeks prior to the site visit. The ERC will also upload the annual report to the NSF/ENG/EEC External SharePoint site. (The NSF Program Staff will provide direction on this issue.)

## D. Distribution of Pre-Site Visit Materials to the Site Visit Review Team

The ERC will query each member of the review team to determine if they want a hard copy of the Annual Report; an electronic version will be available on the SharePoint site. The ERC will send a hard copy of the Annual Report to each site visit review team member who requests one.

NSF Staff will upload to the NSF/ENG/EEC External SharePoint site a copy of the ERC’s last site visit report and a document describing the ERC Program's annual review process and review criteria. The site visit review team members will have access to these documents.

## E. The Evening before the First Day of the Site Visit

NSF staff will brief the site visit team members about the goals of the ERC Program and the annual review process. This briefing will take place on the evening before the first day of the two-day visit at the hotel where the site visit team is staying. No action or participation by ERC personnel is needed for this briefing. NSF staff will work with the hotel to arrange the meeting room for this meeting.

Please do not bring briefing booklets to the hotel for the site visit team.

## F. Hotel for the Site Visit Team

The ERC’s administrative staff will locate a suitable hotel near the site visit location. The hotel must have an on-site or nearby restaurant. The ERC’s administrative staff person will make hotel reservations for the site visitors by name. The site visitors are instructed by NSF to guarantee their room with their personal credit cards. The ERC will be responsible for establishing the room block and reservations for the site visit team. The ERC staff are responsible for sending an email to the PD and NSF Administrative staff the name, address, telephone and fax machine number of the hotel. The ERC staff will also forward the name, phone number and email of the hotel’s meeting / conference room planning contact. NSF is responsible for reserving and paying for the meeting / conference room at the hotel. NSF staff will forward the meeting/ conference room contract to the NSF Contracting Office for approval. (NSF staff emails are: Gwen Hardenbergh, ghardenb@nsf.gov; Marshall Horner, mhorner@nsf.gov; Shalika Walton, swalton@nsf.gov. Please copy all three.)

## G. Provision of Transportation on Site

The ERC will arrange to transport the site visit review team from the hotel to the university and back for the two days. On the second day, the team will be accompanied by their luggage so there should be a large enough van or enough cars to accommodate the luggage. Please provide assistance for making transportation arrangements to the airport for the site visit team members. Parking spaces for the departure day may be needed for visitors who might be driving their own or rental cars. The ERC staff should ask the visitors if there is a need for these spaces on the first day of the visit.

In general, the site visit team members and NSF staff are expected to find and pay for their own transportation from the airport to the hotel and back. However, if the Center picks up or drops off site visitors or NSF staff from the airport, the Center should calculate the value of the transportation provided and add that amount to the $40 collected for meals (see below).

## H. Meals

The site visit review team and NSF staff each will contribute up to $40.00 to the ERC for the costs of their meals for the entire visit. The ERC will provide a receipt to each site visitor for the meal reimbursement and the PD will collect the money during the site visit report writing time and give the funds to the ERC’s Administrative Director.

For dinner on the evening of the first day of the site visit, the ERC administrative staff, with the concurrence of the PD, will make suitable dining arrangements where the site team can have a working dinner. One possibility is a private dining room in the hotel or a working dinner where the team can order from the restaurant menu. If the hotel does not have a suitable restaurant, a private room in a restaurant nearby the hotel will be fine. However, if the restaurant is not within walking distance, the site visit team will need transportation to and from that restaurant, either by taxi or provided by the ERC.

* **Breakfasts.** The ERC will provide a continental breakfast for the site visit review team, ERC team members, and other participants in the site visit. Breakfast should be an opportunity for the site visit team to mingle informally with the ERC personnel and students. Breakfast on the second day may be held in conjunction with the University Administrators meeting if desired. Please make sure there are some protein-rich foods available (e.g. yogurt) plus fruits and carbohydrates to accommodate different preferences and diets.
* **Lunch on the First Day.** Lunch on the first day should be organized to mix faculty, students, and industry/practitioners with the site visit review team members.
* **Lunch on the Second Day.** Please provide the site visit review team with a box lunch on the second day. The lunch should be provided in the report writing room.

Please make sure to provide well-balanced and nutritious vegetarian alternatives.

* **Dinners.** There will be no dinners arranged between the ERC and the site visit review team.

## I. Briefing Room, Executive Session Rooms, and Report Writing Room and Computers

Please secure a briefing room large enough to accommodate the site visitors, your industrial sponsors, faculty, administrators, and any students you want to attend. Too small a room, cramped quarters, and uncomfortable chairs for daylong seating would not be wise. We will also need a small meeting room nearby and on the same floor as the briefing room so that the SVT can meet for designated executive sessions. The table in the executive session room should be large enough to accommodate 15 people. The room should be equipped with a projector connected to a laptop.

On the second day, the ERC will provide the site visit review team with a room for site visit report writing that is large enough to accommodate the laptops of the site visit review team and a second table or adjacent room for lunch and discussion. The ERC will ensure the site visit team has wireless access to the internet, including instructions and passwords, for proper access to the external SharePoint site. The NSF ERC Program Director will be responsible to provide the site visit team with the link to the NSF/ENG/EEC External SharePoint site. The site visit team will use the external SharePoint site to write, review and finalize the site visit report. The ERC will have memory sticks available for each site visit team member as a back up in case there is a problem with the SharePoint site. In addition, the ERC will provide four “back up” laptops, at least one of which will be connected to a printer, and one of which will be connected to a projector.

NSF staff will provide ERC staff with access to the NSF/ENG/EEC External SharePoint site to upload the annual report and any presentation that has been finalized before the site visit. The ERC staff will ensure that the most recent copies of the following documents are available on the NSF/ENG/EEC External Sharepoint site prior to the start of the second day.

* Annual Report (should be uploaded at least five weeks prior to the site visit)
* Briefing slides from Day 1 presentations
* Student Leadership Council SWOT analysis and briefing slides
* Industry/Practitioner Members SWOT analysis and any briefing slides
* Responses to evening questions

# II. PREPARATION OF SITE VISIT BRIEFINGS AND MEETINGS

The presentations and discussions during the site visit allow the site visitors to calibrate the accomplishments and plans of the ERC against related efforts and the ERC review criteria. The presentations should convey an overall command of the field upon which the ERC is focused and provide information pertinent to the review criteria. The time allotted to each presentation should allow approximately 70 percent for the presentation with the remaining 30 percent for questions from the site visit team. This will enable a dialogue to explore issues and resolve any ambiguities. Ample time for Q&A is extremely important for both the site team and the ERC.

# III. AGENDA FOR THE SITE VISIT

The ERC will review the following guidelines and construct an agenda. ERC management is encouraged to discuss possible modifications of the suggested format with the ERC PD and should email a draft agenda to the ERC PD for review at least six weeks prior to the site visit. The final format for the site visit agenda will be the ERC’s responsibility. Please send an email to the ERC PDwith the final agenda when it is completed (and upload it to the NSF/ENG/EEC External Sharepoint site) but at least a week before the visit.

##  Suggested Agenda for First Day

### Items to be Included in the Agenda on the First Day

* Continental breakfast at about 7:45 a.m. at the ERC’s conference room.
* Begin briefings no later than 8:15 a.m. and conclude by about 5:30 or 6:00 p.m.
* The visit should begin with introductions of key ERC and university personnel by the ERC Director. The Center Director should read the name and affiliation of the site visit team members and ask each to stand.
* Key elements of the briefings to the site visit team are outlined below. The agenda must begin with the “Overview of the Center” and the “Research Program.” The order of the remaining items will depend on the ERC, unless otherwise noted.
* A final executive session for the site visit team at the end of the first day that results in a list of issues for the ERC team to address that evening
* A presentation the morning of the second day by the ERC team of its responses to the issues raised by the site visit team the previous day.
* Please note on the agenda that the site visit team will meet together in executive session for dinner and discussions on day one.

### 1. Executive Sessions

Throughout the first day, there will be two executive sessions for the site visit review team and NSF staff. The first will be after the completion of both the Director’s overview and the research program and should be about 40 minutes. Just before lunch usually works best. The second executive session must be one-hour in duration at the end of the last session of the first day. Its purpose is for the site visit review team to discuss major concerns and develop a list of issues and questions requiring additional information from the ERC. This session will require a computer or laptop, a memory stick and an electronic projector. It will be followed by a 15-minute session with the ERC’s leadership team to transmit the issues and questions and be sure they are understood. At the end of this session, the ERC PD will give the memory stick to the Center Director for use as a reference for the ERC’s leadership team as they respond to the issues. The site team will use the responses to help formulate their recommendations in the site visit report.

2. Overview of the Center*: (Presented by Director and Deputy Director as appropriate)*

This will be the first presentation of the visit. The presentation should address the elements contained in the NSF performance criteria for the vision and strategic plan of the ERC and provide a brief overview of the rest of the ERC. The presentation will include information on the following:

• Vision, engineered systems focus, strategic research plan and milestone chart, including the roles of major testbeds;

• Structure and organization of the research program and major advances in knowledge and technology in the last year for new centers and for up to the last three years for older centers, plus plans for the following year;

• University and pre-college education goals, strategy, and accomplishments;

• Industrial collaboration and technology transfer goals, strategy, and impacts of technology transferred; and for Gen-3 ERCs the Innovation Ecosystem and strategy for involvement of innovation partners and small businesses as time goes by;

• Overview of the ERC infrastructure:

• Institutional configuration, leadership and faculty teams;

• Strategy to increase the diversity of the ERC’s leadership, faculty, and students teams, actions taken, results to date benchmarked on national averages in engineering, the diversity climate of the center and the ERC’s impact on diversity, and plans for the future;

• Management, project selection and termination, and oversight systems;

• Equipment/facilities – including networking for any cross-institution collaborations;

• Financial support from all sources and functional budget showing expenditures in the last year by function (may be presented by Administrative Director if desired);

• Plan for self sufficiency after NSF support ceases, if the ERC is five years or older;

• Response to any major weaknesses/threats regarding the vision, plan, and management raised in the previous year site visit report should be addressed during this briefing.

3. Research Program by Thrust ***(and by major system testbed if a thrust is not devoted to it)*** *(presented by Thrust Leaders and others)*

The presentation should address the elements contained in the NSF performance criteria for this feature of the ERC. The goals of each thrust/systems testbed should be presented, along with the research program and how the research is motivated by the ERC's strategic plan and the state-of-the-art. There should be sufficient depth about the methodologies used in key projects, and the major deliverables to demonstrate the quality of the research, the thrust's contributions to the state-of-the-art, and demonstrated awareness of what others are doing in the field. The integration of the projects within the thrust and between thrusts should be discussed. A significant portion of this presentation, for thrusts with imbedded testbeds, should be directed toward a discussion of the progress made and the lessons learned from the testbeds that are completed and/or underway. Any research outreach, connectivity, and collaborations with other ERCs and groups and significant industrial/practitioner/user research collaborations should be presented at this point. Any major changes in thrust directions or projects should be discussed. Respond by thrust to major issues raised in the prior site visit report.

4. Lab Tours and Test Beds ***(optional)***

Provide opportunities for students to demonstrate the equipment/test beds/simulations used in the ERC’s research. These tours may be interspersed in the time devoted to the research program.

5. Poster Session*(at least one hour at the end of the research presentations and lab tours, if any)*

There should be a poster session where students discuss their research with the site visit review team members. Posters should be organized by research thrust, since reviewers often use the poster session to gain in-depth knowledge of projects of particular interest to them. NSF will organize the site visitors so that there is appropriate coverage. Unfortunately, it is not appropriate for the site visit team to serve as judges in a “best poster” competition. A map of the posters is useful.

### 6. University and Pre-college Education and Private Meeting with Students

The ERC team will present overviews of its university and pre-college education programs. At least one hour of the site visit presentation sessions will be devoted to university and pre-college education, and diversity. The private meeting with students is in addition to this hour. The presentations should address the elements contained in the NSF performance criteria for this feature of the ERC. The presentations should:

* Begin with the goals and the strategic plan;
* Explain how the Center is developing skill sets in graduates so they are more effective in industry (Gen-2 and Gen-3) and how they are developing additional skills for creativity and innovation (Gen-3);
* Explain how the education program rests on specific elements of the research, industrial collaboration and innovation programs to achieve its goals;
* Discuss opportunities for international experiences (greater than 30 days) for students (Gen-3);
* Illustrate the Center’s implementation approach using actual examples including the Center’s RET and REU programs;
* Discuss the role of these education programs in strengthening the diversity of the ERC’s student team and the diversity climate of the Center;
* Discuss assessment plans and results, if any to date.

The presentations should include the role of supplemental support provided by the ERC Program or other NSF educational awards outside the base ERC funding in fulfilling the program’s goals.

Private Meeting with ERC Students: Following this presentation, the site visit review team will meet with a group of the ERC’s undergraduate and graduate students. Schedule 45 minutes to one hour for a private session with the students during which there will be a presentation of the Student Leadership Council’s SWOT analysis of the ERC to the site visit review team. The students’ SWOT analysis should be conducted prior to this private meeting and a summary of the results presented to the site visit team, including an update of progress achieved for centers older than one year. The rest of the time during the private session will be devoted to a general discussion of the value added for the students by participation in the ERC.

### 7. Industrial/Practitioner Collaboration, and Technology Transfer/Innovation and Private Meeting with Industry

The ERC’s Industrial/Innovation Program Director will present an overview of the ERC’s strategy for industrial/practitioner collaboration, technology transfer, and for Gen-3 ERCs, the innovation ecosystem program. The presentations should address the elements contained in the NSF performance criteria for this feature of the ERC. The briefings should:

* Provide the rationale for selection of technology targets given the state of the art and the ERC's research, provide information on memberships and industrial involvement in the ERC, and demonstrate the impact of ERC-developed technology on industry and practice achieved so far.
* For Gen-3, discuss the status of the innovation ecosystem.
* Include the role of the Industrial Advisory Board (IAB), current membership, and membership trends, current mix of firms across the sectors and identification of membership gaps for which new firms must be recruited. Discuss how the current members and the targeted members fit into the value chain applicable to the Center’s mission and vision.
* Discuss the engagement of industry and innovation partners (Gen-3, and, if applicable, Gen-2) in the ERC including their activities, involvement with students and the opportunities for student entrepreneurships, etc.
* Discuss the contributions of international partners and opportunities for international experiences for students.
* Provide the rationale for technology targets and major technology transfer accomplishments with information on who used the technology and what the impact has been from an industry perspective.

Private Meeting with the IAB: Following the briefing, there will be a private meeting of the site visit review team with the industrial members present. This meeting should not take place over lunch. During the private meeting, a representative of the IAB will present a summary of the IAB's SWOT analysis of the ERC and, for ERCs older than one year, an update of progress made in addressing prior SWOT weaknesses and threats. This will be followed by a discussion of the value added by the ERC to industry/practitioners. (Allow one hour for the private session).

###  8. University Officials

Depending upon the situation, given earlier reviews, the need for the inclusion of this meeting in annual reviews will be determined by the ERC’s PD and Director. If there is a university officials meeting, the meeting will include the university Dean(s) to whom the ERC reports, key department chairs, and other pertinent university officials. There is no need to bring all the Deans from the partner universities on an annual review as the lead university Dean will represent their input through the Dean’s Council. However, those that wish to attend are always welcome. Discussions usually focus on institutional support, tenure and promotion (and, for Gen-3 ERCs, reward for mentoring) policies to facilitate interdisciplinary collaboration, diversity, space and facilities, and, for Gen-3 ERCs, mentoring roles. The positioning of this meeting in the agenda is flexible. The Director and Deputy/Associate Director of the ERC may attend this meeting. The meeting may be combined with breakfast on Day 2; if so, allow 30 minutes for eating and another 45 minutes for open discussion.

### 9. Executive Session at the end of the First Day

The purpose of the last executive session, a one-hour session, is to generate a list of questions/issues about which the site visit team needs clarification before writing the site visit report. This session will require a computer connected to an electronic projector with a flash drive or memory stick. The executive session will be followed by a 15-minute session where the site visitors will provide the ERC with its list of issues to be sure they are understood. At the end of this session, the ERC PD will provide this list to the ERC on a disk/memory stick.

### 10. Evening Work for the Site Visit Team and the ERC on the First Day

Please note on the agenda that the site visit team will meet together for dinner and discussions and the ERC team will meet to prepare responses to the issues raised by the site visit team. The members of the ERC leadership team should make sufficient time available on the evening of the first day to prepare responses to the questions and be ready for discussion. The ERC team will prepare brief responses to these questions for presentation and discussion the morning of the second day and prepare a limited number of PowerPoint slides that state the issues and the brief response, which will be used to focus the discussion between the ERC team and the site visit team. It is critical that the prepared materials are sufficiently brief to allow for an active dialog, since this will be the last opportunity the site visitors have to resolve their major issues. Hard copies of the slides should be prepared for the site visit review team and the others attending the meeting. An electronic version should be provided to the Program Director and uploaded to the NSF External SharePoint site.

## B. The Second Day

1. Breakfast and Discussions***.*** Please provide a continental breakfast at 7:30 a.m. for the site team members. This breakfast may be devoted to the discussion with the university administrators if such a discussion is scheduled. The breakfast will be followed by a one to two-hour session for the ERC’s leadership team (Director, Deputy, Thrust Leaders, Industrial Liaison Coordinator, Education Program Leaders, and Administrative Manager) and the site visit review team to discuss the issues raised.

2. Site Visit Report Writing***.*** By 9:30 or 10:00 a.m., depending on whether there is a breakfast with administrators and on the length of the list of issues and the discussion, the site visit review team will move to the site visit report preparation room for further discussion and site visit report preparation. Along with computers, printers, and an electronic projector as discussed above, the ERC must furnish a computer technician, a phone for connection to the ERC’s administrative staff, and a box of memory sticks in case the network fails. The computers must be networked and a shared file created for NSF’s use. The center staff will load the relevant site visit report outline in that shared folder. The relevant site visit report outline can be found on the [ERCWeb Library site](https://www.erc-reports.org/help/ann_rpt_guide.cfm?session_id=613072079295537498511792&state_id=1083690). The connection of the PD’s computer to the projector must enable simultaneous viewing on the monitor of the source computer and the projection screen.

3. Departure***.*** Departure time to the airport for the site visit review team will be 4:30 p.m. at the latest. Please arrange transportation to the airport for the site visit review team, either through taxis or a van, depending upon how far the university is from the airport.

# IV. LOGISTICS AND OTHER ISSUES

The ERC will prepare briefing notebooks containing the agenda, presentation slides, and a list of all posters at the poster session for all members of the site visit review team, NSF staff, and the ERC’s participants and make these available to them at the beginning of the visit. The copies for the site visit team should not be delivered to the hotel ahead of time. The ERC staff will upload all the site visit materials (e.g. presentations, SWOT analyses, and responses to overnight questions, etc.) to the ENG/ENG/EEC External SharePoint site. The ERC will prepare nametags for the visitors and the ERC’s team. If the ERC team is seated at a table, remember to make two-sided name cards for the table.

## Summary of Site Visit Preparation Steps for ERC Administrative Director

* Receive a list of visitors from the lead NSF ERC PD 8 weeks before the annual site visit
* The ERC’s administrative staff will locate a suitable hotel near the site visit location
* The ERC’s administrative staff person will make hotel reservations for the site visitors by name
* The ERC staff are responsible for sending an email to the PD and NSF Administrative staff the name, address, telephone and fax machine number of the hotel
* The ERC staff will forward the name, phone number and email of the hotel’s meeting / conference room planning contact to NSF Administrative staff
* Copied on the logistic letter to the site team members from the NSF staff
* Once NSF staff has sent the logistics letter, the ERC AD will contact site visit team members to determine travel schedules, food preferences, and delivery format of the annual report
* Will send 5 hard copies of annual report to the NSF Staff at least five weeks prior to the site visit
* Upload the annual report to the NSF/ENG/EEC External SharePoint Site 5 weeks prior to the site visit
* The ERC will arrange to transport the site visit review team from the hotel to the university and back for the two days
* Must plan the following meals and breaks
	+ Breakfast (1st & 2nd day)
	+ Lunch (1st & 2nd day)
	+ Morning and afternoon breaks (1st day)
* Secure a Briefing Room
	+ Ensure room has wireless internet access for site team members
* Secure an Executive Session Room
	+ Ensure room has wireless internet access for site team members
	+ Ensure room has a laptop connected to a projector
* Secure a Report Writing Room
	+ Ensure room has wireless internet access for site team members
	+ The ERC will have memory sticks available for each site visit team member as a back up
	+ Provide four “back up” laptops, at least one of which will be connected to a printer, and one of which will be connected to a projector
* ERC Staff will upload the following documents before the 2nd day of site visit to the NSF/ENG/EEC External SharePoint Site:
	+ Annual Report (should be uploaded at least five weeks prior to the site visit)
	+ Briefing slides from Day 1 presentations
	+ Student Leadership Council SWOT analysis and briefing slides
	+ Industry/Practitioner Members SWOT analysis and any briefing slides
	+ Responses to evening questions
* Collect money from site visitor team (the PD will collect from individual site team members) and provide a receipt for the meal (and transportation if necessary) amount to each site visit team member.