Reverse Site Visit (RSV) - Updates

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PD/PA Meeting
Arlington, VA

May 19, 2015
RSV Purpose

- RII Track-1 Cooperative Agreement: assess progress and provide feedback
- Important post-award management
- Opportunity to present progress and plans
- External peer review
- Provide input to NSF and project team
  - Reinforce where project is succeeding
  - Identify weaknesses or risks
  - Identify opportunities
  - Provide recommendations for improvement
RSV now & why change

Recent Past:
• 2 RSVs per project (start of Year 2 and 4)
• RSVs in September
• One panel for 3-4 projects
• Half-day per project team
• Report with Recommendations
• Follow-up

Rationale for Change:
Incorporate feedback from Project teams, Review Panels, and NSF EPSCoR to maximize benefits for all
Feedback on RSV

- Expanded opportunity to present project progress, outcomes and accomplishments, especially intellectual merit of research

- Increased interaction with panel for questions and answers session

- More time before first RSV for new projects to establish progress, outcomes, and accomplishments
RSV changes

• Different timing for Year 2 and 4 RSVs -- **September for Year 4 cohorts** and **March for Year 2 cohorts**

• **One Panel** for **one-day** focused on **one project**

• Adequate time for presentation and in-depth Q &A sessions

• Report to reflect panel assessment to benefit project
RSV Format

Day 1: Team, Panel, & NSF  (8:30am – 5:30pm)

• Introductions (Team, Panel)
• Team Presentation: Project Overview  (30 + 15 min)
  and Q&A
• Team Presentation: Research  (90 + 30 min)
  and Q&A
• Team Presentation: Project Elements  (75 + 15 min)
  and Q&A
• Executive Session (Panel)  (75 min)
• Interactive Discussion (Team, Panel)  (90 min)
RSV Process

Day 2: Panel and NSF EPSCoR
• Report Writing and Finalization

After RSV: Managing PO
• Uses Panel advice to distill Recommendations
• Sends Panel Report and Recommendations with Required Actions to PD

Follow-up on RSV Recommendations: PD (with project team) and Managing PO
<table>
<thead>
<tr>
<th>Event</th>
<th>Year 4 RSV (start of Year 4)</th>
<th>Year 2 RSV (6-9 mo into Yr2)</th>
</tr>
</thead>
<tbody>
<tr>
<td>“Save the Date” to PD</td>
<td>March</td>
<td>September</td>
</tr>
<tr>
<td>RSV details to PD</td>
<td>April/May</td>
<td>October</td>
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<tr>
<td>RSV</td>
<td>September</td>
<td>March</td>
</tr>
<tr>
<td>Report and Recommendations</td>
<td>October</td>
<td>April</td>
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<tr>
<td>Follow-up</td>
<td>Remainder of project and beyond</td>
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Summary Changes*

- Incorporates feedback and allows in-depth interaction between project team and RSV panel
- 2 RSVs per project
  - September RSV for Year 4 Cohorts
  - March RSV for Year 2 Cohorts
- One panel for a full day for each project
- Panel Report with Recommendations from PO
- Follow-up (project team and PO)

* Changes shown in blue
More Details*

- **Project Team** – *unrestricted size*
  
  Members leading project activities + up to one member of jurisdiction’s Steering Committee (not associated with project)

- **Panel** – about **4-6** external and NSF experts

- Panel members have access to
  - most recent annual project report
  - current strategic plan,
  - prior RSV report and responses (as applicable),
  - current jurisdiction Science and Technology Plan,
  - original proposal, its merit review related doc., incl. PTCs

*Changes shown in blue*
RSV Roles

• RSV panel
  – Reviews documents
  – Listens to presentation, Leads Q&A sessions; Discusses progress and feedback with Project Team
  – Writes report (Summarizes findings indicating strengths and weaknesses)

• NSF EPSCoR (esp. Managing Program Officer)
  – Reviews report and distills recommendations/required actions
  – Follows up on responses to recommendations and progress

• Project Director (and Team Members)
  – Organizes the team, Prepares for RSV, and Participates in RSV
  – Reviews report and responds to recommendations
  – Implements approved actions and reports on progress
Presentation: Project Overview

• Motivation and goals;
• Participating institutions and their roles;
• Management structure;
• Budget, distribution among participating institutions and project components, and leverage of cost share;
• Barriers/challenges faced to date (or anticipated) and actions planned/taken to address them;
• Progress on Project Terms and Conditions, jurisdiction-specific conditions; and,
• Changes/progress in response to prior (Year 2) RSV.
Presentation: Research

- Research goals and objectives (presented in the proposal and the strategic plan);
- Progress to date relative to intellectual merit and broader impacts of the research;
- Research results, outcomes, and accomplishments including major research findings/contributions to the disciplinary and interdisciplinary fields; and,
- Impacts of the research within and across disciplines and within and outside the jurisdiction (including research capacity and infrastructure improvements).
Address research in each focus area in the context of:

• other efforts in the field;
• major scientific challenges;
• novelty and originality of the approaches; and,
• research and training methods that support the intellectual merit and broader impacts of the research.

Overall emphasis is on progress, accomplishments, and impacts to date.
Presentation: Project Elements

• Activities and progress relative to Broader Impacts;

• Progress to date in all project elements (not necessarily in this order)
  – Integration of Research and other Project Elements;
  – Workforce Development (students graduated, their job placement/training or further education, teacher training and impacts);
  – Diversity (demographics of participants, disciplines, institutions, geographic distribution, improvement over baseline);
– Partnerships and Collaborations (contributions in enhancing progress, economic development);
– Outreach (stakeholder engagement, relation to project progress and impact);
– Plans for future activities with emphasis on long-term Sustainability (continuation of project activities, collaborations, partnerships, retention strategies for new hires and other participants, future funding opportunities and potential); and
– other activities and impacts you may wish to present.

Emphasize progress, accomplishments, and impacts to date.
QUESTIONS?

Thank You