



# Reverse Site Visit (RSV) - Updates

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Arlington, VA

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# 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**



# RSV Target Timeline

	<u>Year 4 RSV</u> (start of Year 4)	<u>Year 2 RSV</u> (6-9 mo into Yr2)
“Save the Date” to PD	March	September
RSV details to PD	April/May	October
<b>RSV</b>	<b>September</b>	<b>March</b>
Report and Recommendations	October	April
Follow-up	Remainder of project and beyond	



# 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).



# Presentation: Research (cont.)

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);



# Presentation: Project Elements (cont.)

- 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