

PREPARING FOR AND CONDUCTING A PLANNING GRANT MEETING

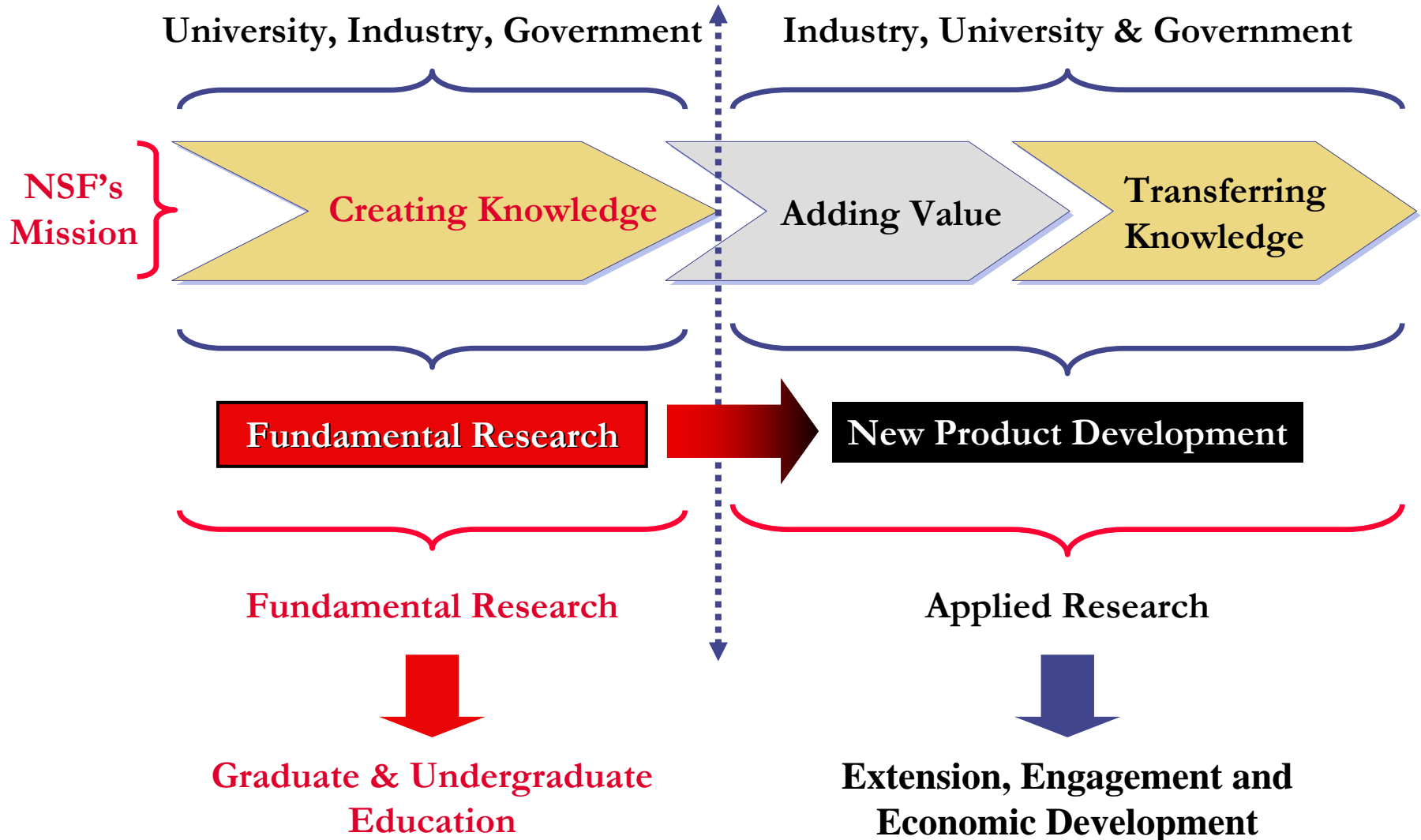
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My thoughts on I/UCRCs

- ◆ **ECONOMIC DEVELOPMENT**
- ◆ **INDUSTRY ORIENTED SCIENCE AND TECHNOLOGY ACTIVITIES**
- ◆ **SERVICE, EDUCATION & RESEARCH**
- ◆ **DELIVERABLES, DELIVERABLES, DELIVERABLES**

Our Center Model Works...

Fundamental Research Leading to Product Development



What you should have done already...

before your planning grant meeting

- ◆ Identified the needs of the industry targeted
- ◆ Identified faculty participants and faculty buy-in
- ◆ Identified your partner institutions and buy-in
- ◆ Identified the target industry partners
- ◆ Identified your **center analyst**
- ◆ Prepared
 - Membership agreement
 - Bylaws
 - Perspective
 - One page description of center vision, mission and value adds
 - List of Facilities
 - Top ten reasons why a company would join the center

What you should do NOW...

before your planning grant meeting

- ◆ **Meet with key faculty participants from all partner institutions and your center analyst to define a common vision**
- ◆ **Start a dialog with some key potential member companies discussing your collective vision**
- ◆ **Meet with University administration to get buy-in (and support)**
- ◆ **Refine**
 - Membership agreement
 - Bylaws
 - Perspective
 - One page description of center vision, mission and value adds
 - List of Facilities

Our Vision

an example

- ◆ to become a global **research, educational, and training** resource for the Filtration Industries by developing innovative **materials, processes** and **systems** that sustain and improve the economic well being of the nation and contribute to the quality of the environment and public health.

Getting ready for the planning meeting

assuming you have received the planning grant

- ◆ **Set up a Web site**
- ◆ **Press release – at all sites**
- ◆ **Announcements at trade exhibitions, conferences, etc.**
- ◆ **Send invitations to potential participants – include the following:**
 - Letter stating the purpose of the meeting
 - Agenda
 - One page description of the proposed center
 - Link on web site for all documents
 - Link for registration

At the meeting...

- ◆ **WHY US, WHY NOW, that is the question...**

- ◆ **You need to sell (and get feedback on)**
 - The **Concept** – the need for the center, the World would be a better place with the center in place
 - The **Organization** (s) – track record is important
 - The **Science** – the relevancy of the science to current and future problems
 - The **Cost** – is the cost of membership reasonable

The Agenda

- ◆ **Select and invite a key moderator from Industry**

- ◆ **Start with the NSF template – it works... Modify it and adapt it as necessary. The topics include:**
 - **The Concept** – (WHY)
 - ◆ The Center Director should do this and set the theme for the type of research conducted by the center – **Research Thrust Areas**
 - **The Organization (s)** – (WHO)
 - ◆ NSF gives this talk and gives you (us) credibility
 - **The Science** – (WHAT)
 - ◆ The faculty participants give talks – discussing current accomplishments and typical research conducted under the center
 - ◆ Limit the talks and allow plenty of time for Q&A (**Good luck with this one**)

Recent Agenda

MemFAST

Day 1, November 15, 2007		
11:30	13:00	Registration and Lunch, Welcome, Tom Daugherty, P&G, Behnam Pourdeyhimi, NCSU
13:00	13:15	Roundtable Introductions
13:15	14:00	MEMFAST: OVERVIEW, RATIONALE, VISION & MISSION <i>Behnam Pourdeyhimi</i>
14:00	15:30	NSF I/UCRC PROGRAM OVERVIEW <i>Introduce I/UCRC model, introduce NSF evaluators (LIFE forms introduction), and answer initial questions</i> <i>Center Evaluator</i> <i>NSF Program Director</i>
15:30	16:00	Break
16:00	16:30	Alan Greenberg, Site Director, University of Colorado at Boulder <i>Center Transition: MAST to MemFAST</i>
16:30	17:00	George Chase, Site Director, University of Akron <i>Transition to MemFAST</i>
18:30	21:30	Reception and Posters - NC State University Club <i>Provides networking opportunities between industry and university in an informal setting</i>

Day 2, November 16, 2007		
7:00	8:00	Breakfast
8:00	8:40	Project Presentations: Characterization, Micro and Macro Modeling <i>Characterization, Micro- and Macro-Modeling in Filters and Membranes</i> - Hooman Vahedi Tafreshi <i>New Methodologies in Microscale Filtration Modeling – Hooman Vahedi Tafreshi</i> <i>Continuum Models for Filter Design – George Chase</i> <i>Sensors for Real-Time Characterization of Membrane Fouling – Alan Greenberg</i>
8:40	9:20	Project Presentations: Novel Materials, Surface Engineering <i>Overview of Materials Fabrication and Surface Engineering – Greg Parsons</i> <i>Vapor-phase conformal surface modification of 3D fiber systems – Greg Parsons</i> <i>Surface Engineering of Fibers – Bin-min Newby</i> <i>Functional Nanofibers: Novel Materials And Approaches – Saad Khan</i>
9:20	10:00	Project Presentations: Novel Materials, Process Engineering <i>Novel Materials and Process Technologies – Behnam Pourdeyhimi</i> <i>Novel engineered thin polymer fibers – Darrell Reneker</i> <i>Nanofibrous Materials And Membranes: Encapsulations, Intercalation And Release– Alex Yarin</i> <i>Membrane Formation: Novel Materials & Innovative Processing – Richard Noble & Alan Greenberg</i>
10:00	10:30	Break
10:30	12:30	Companies Needs and Expectations Workshop <i>Industry moderated, without university presence</i>
12:30	13:30	Working Lunch Company Discussion Review <i>Review main points of previous workshop with university present</i>
13:30	15:30	LIFE form Review and Discussion <i>NSF or NSF Evaluator moderated. Allows industry to discuss each other's initial reaction and gain a preview how a normal meeting would operate</i>
15:30	16:00	NSF Closed Session with Industry <i>Discuss any further questions or comments about the center</i>
16:00	16:30	Wrap-up and Closing Comments

At the meeting...

- ◆ Work closely with your center analyst
- ◆ Make sure you have hand outs of all talks for distribution to the participants
- ◆ Make sure the talks are loaded up and ready - no last minute changes
- ◆ Make sure you have plenty of additional posters at the reception to keep the industry engaged
- ◆ Make sure someone is taking good notes - your center analyst will not be able to take care of everything
- ◆ Collect LIFE form feedback for each project presentation (consider web LIFE)
- ◆ Use this feedback to refine your research agenda
- ◆ **LISTEN, LISTEN, LISTEN**

After the planning meeting

Do not celebrate Victory Yet

- ◆ Take a few days off
- ◆ Come back and review the comments received from industry participants
- ◆ Refine and Finalize
 - Membership agreement
 - Bylaws
 - Perspective
 - One page description of center vision, mission and value adds
 - List of Facilities
- ◆ Make sure that all Partner Institutions are OK with these documents. **(Good luck with this one too)**

After the planning meeting

- ◆ Write a follow up letter to the companies attending thanking them for their participation

- ◆ Refine and Finalize
 - Membership agreement
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- ◆ Make sure that all Partner Institutions are OK with these documents. **(Good luck with this one too)**

After the planning meeting

- ◆ Start signing up companies...
- ◆ Start writing your final proposal to NSF. Assuming that you have kept NSF in the loop and provided you have the required number of companies signint a LOI, you will be ready to launch...
- ◆ Update the web site
- ◆ Set up a members' only section
- ◆ Define process for proposal submission, etc..
- ◆ **You are now a Center...**

After the Launch

- ◆ It takes hard work and commitment to the principles already defined to keep going
- ◆ Success breeds success. Your members will be the main advocates for the center and will help you recruit.
- ◆ Make sure you stay customer focused
 - Industry
 - Students
 - University and its partners
 - Community