The Planning Meeting: Going All Out

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Iowa State University
A Well Organized Planning Meeting will...

- Inspire confidence in your organizational ability
- Achieve the Planning Meeting goals:
  
  1. *Interaction between prospective member companies, research team, university administration*
  2. *Determine the Year 1 Research Agenda*
  3. *Communicate the benefits and policies of Center membership*

- Be pivotal in commitment to membership
Make Full Use of Resources

The NSF’s Role: Facilitate a Center environment in which long term relationships between industry and academia can thrive.

• Cooperative Agreement and Operational Framework
• Best practices based on decades of evaluation

1. Purple book
2. Center for Friction Stir Processing Wiki
Welcome to the Center for Friction Stir Processing

The CFSP has a new homepage. Please visit cfsp.home.org for the latest information on the CFSP.

This multi-institutional National Science Foundation Friction Stir Processing Industry/University Cooperative Research Center (I/UCRC) was started in October 2004. Four leading programs on Friction Stir Welding and Processing at the South Dakota School of Mines and Technology (SDSM&T), Brigham Young University (BYU), the University of South Carolina (USC), the Missouri University of Science and Technology (MST), and the Wichita State University (WSU) formed a partnership for this center. BYU is the lead institution for the Center. Friction Stir Welding (FSW) is a revolutionary solid-state (below solidus) joining technology patented by The Welding Institute (TWI-UK) in 1991. It has seen an explosive growth in research, development, and application over the last decade. FSW has shown higher strengths, fewer defects, lower residual stress, and less distortion in single pass, full penetration, thick section (>1 inch) aluminum applications. FSW of metal matrix composite, titanium, and ferrous alloys still requires fundamental research to maximize this technology. Friction Stir Processing (a variant of FSW) has received increased interest as a rivet replacement technology and a microstructural modification technique to induce superplasticity in thick section materials, to locally modify the microstructure in complex castings and to add micron and submicron particles into metal surfaces.

National Science Foundation
Center for Friction Stir Processing I/UCRC University Partners

![Partner Logos]
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2. Center for Friction Stir Processing Wiki
3. Presentations and contacts from Boot Camp / Directors’ meetings
4. NSF I/UCRC Operational Tools site
Typical Planning Grant Workshop Agenda for a Multi-University I/UCRC

Draft agenda must be vetted with NSF and a conference call scheduled with the NSF and Evaluator to review meeting plans.

Day 1:

7:30 am  Participant Registration

7:30 - 8:15 am  Breakfast and Networking Time

8:15 - 8:30 am  Welcome Remarks (Center, site directors; university administration - Deans & VPs preferred)

8:30 - 9:15 am  Vision, Capabilities and Value Proposition of the Center (Center, Site Directors)

9:15 - 10:15 am  NSF I/UCRC Presentation (I/UCRC Program Director and Evaluator)

10:15 - 10:30 am  BREAK

10:30 - 12:30 pm  Project Proposal Presentations
  • Limit to 5 projects
  • List the project titles and time allocated to each
  • Strict adherence to presentation template
  • Make sure each project has clear milestone, deliverables for the first year and proposed budget
  • Leave adequate time for discussion
  • LIFE forms for each project must be filled out (electronic and paper) prior to start of next presentation

12:30 - 1:30 pm  LUNCH

1:30 - 3:00 pm  Project Proposal Presentations
  • Limit to 5 projects
Planning the Planning Meeting: Industry reps

Contact as many companies as possible
- Inform about the proposed center / Invite to Planning Meeting / Distribute marketing materials
- Use email, telephone; make contacts at meetings, trade shows

Expect only **one third of those who attend, to commit to membership**
- $150k in memberships required per site

Web site
- Provide as much information as possible on the web site!
- **Link to**
  - NSF video selling I/UCRC concept
  - Presentation on how to do LIFE form
  - e.g. [www.ent.iastate.edu/camtech](http://www.ent.iastate.edu/camtech)
Planning the Planning Meeting: Logistics

- Coordinate with NSF and Center Evaluator to set dates
- Book location
- Reserve block of rooms at discounted price
- Invite President / Dean / Other for welcome address
  - Provide direction on what they should highlight

- Establish web site: Provide detailed information including
  - Planning Meeting Registration
    - Dietary restrictions
    - Meal / boxed lunch selections
  - Transportation (airport / driving directions / street addresses for GPS)
  - Accommodation
  - LIFE Form links and information
- Research proposals presented should be the result of discussions with prospective members
- Solicit proposals from researchers well in advance of the planning meeting
  - Collect executive summaries for meeting packet
  - Generate posters (provide template)
<table>
<thead>
<tr>
<th>Project Title:</th>
<th>Research Team:</th>
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<tbody>
<tr>
<td>Area of Emphasis:</td>
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<th>Need and Industrial Relevance</th>
<th>Project Goals</th>
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<th>Approach and Methods</th>
<th>Objectives</th>
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<th>Impact</th>
<th>Project Duration</th>
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<th>Outcome/Deliverables</th>
<th>Proposed Budget</th>
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- Select 10 research projects for oral presentations
  - Allow 12 min for each talk, 8 min for discussion
  - Provide template for presentations
Planning the Planning Meeting: Presentations

- Research proposals presented should be the result of discussions with prospective members
- Solicit proposals from researchers well in advance of the planning meeting
  - Collect executive summaries for meeting packet
  - Generate posters (provide template)
- Select 10 research projects for oral presentations
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  - Provide template for presentations
  - Schedule PRACTICE TALKS with remote connection to other site/s

Director should also practice his / her VISION TALK
Vision for CAMTech

- Motivation and Vision
- NSF I/UCRC
- The Players
  - Team strengths
  - Facilities
- Timeline
- Research Agenda
- Benefits of CAMTech Membership
- CAMTech Planning Meeting Goals
Planning the Planning Meeting:
On the day

- Registration table
- Half hour coffee breaks with posters
- Use bell to call attendees back into the room
- Assistant - registration
  - food on time
  - extension cords for computers etc.

- Boost internet connection if necessary
- Backup projector / laptop / pointer

*Nothing presented should be confidential*
After The Planning Meeting

Submit revised proposals to industry reps for ranking

Deadlines are set at the Planning meeting for
- Ranking of revised proposals by industry reps
- Letters of commitment to membership