



# Space Grant Directors' FY23 Site Visit Orientation

April 18, 2023

# Site Visit Overview



The Space Grant site visit is designed to evaluate individual site performance in terms of goals/objectives, accomplishments, management and operations, partnerships, collaboration, impact, and areas of improvement relative to Space Grant goals and objectives.

This document provides guidance regarding how to best prepare for your site visit. The majority of the guidance in this document is in the form of question and answer.



# Is There A Sample Agenda?



Time	Item	Checklist
9:00-9:05	Welcome	Center Specialist
9:05-9:15	Consortium Showcase	PI/Consortium
9:20-10:00	Discussion of Section 1 and Section 2 of Rubric	Accomplishments/Operations
10:05-11:00	Discussion of Section 3 and Section 4 of Rubric	Diversity, Equity and Inclusion (DEI)/ Collaborations
11:05-11:55	Discussion of Section 5 of Rubric	Performance Management
12:00-12:45	Lunch Break	
12:55-1:45	Section 6 of Rubric	Budget
1:50-2:55	Discussion of Section 7, 8, 9, 10&11	Achievement Impact Milestones Chart Improvements/Recommendations
2:50-3:00	Next Steps, Adjournment	



# WHO SHOULD I INVITE TO THE SITE VISIT?



- Ideally, you should invite relevant members of your Consortium and university leadership from the lead institution (e.g., Vice president of research, deans, department chairs, etc.). Additionally, you should invite relevant staff and personnel knowledgeable of the following: Consortium operations, Consortium DEI plans and accomplishments, budget, milestones chart, budget spreadsheets, Consortium-specific goals, outputs, outcomes, outreach strategy, performance, collaborations, participant numbers, number of student presentations, publications, patents, partnerships, and collaboration.
- You are responsible for forwarding the calendar invite to all stakeholders.



# CAN I ATTEND A DIFFERENT SITE VISIT AS A GUEST?



- Yes, you may attend another consortium's site visit as a guest. If you would like to attend another consortium's site visit as a guest, please coordinate with the site visit's host PI (i.e., the Space Grant director)
- While you may have been able to view other states' presentations, we do not have an expectation that you should copy what they have done. We want you to present the information for your Consortium in the manner that best conveys the information. There is no right or wrong way (as long as the necessary information is presented).
- Here's the [list of site visit dates](#)



# HOW SHOULD I PREPARE FOR THE SITE VISIT?



- a) The Space Grant director and coordinator will receive a calendar invite from NASA HQ in April 2023
- b) Forward the invite to all consortium stakeholders.
- c) Complete the [Pre-site visit checklist](#)



# WHAT IS THE PRE-SITE VISIT CHECKLIST?



- Completed PI Self-Assessment based on Year 3 activities (submit NLT 3 weeks prior to Site Visit date).
- Submitted Budget (“Proposed” vs. “Actual” Year 3 Activities).
- Milestones for Year 3 planned milestones (submit NLT 3 weeks prior to Site Visit date).
- Prepare a 10-minute presentation on Consortium’s Previous Award’s Past Performance Accomplishments and Achievements (consortium showcase).
- Invite relevant staff and personnel knowledgeable of the following: Consortium operations, Consortium DEI plans and accomplishments, budget, milestones chart, budget spreadsheets, Consortium-specific goals, outputs, outcomes, outreach strategy, performance, collaborations, participant numbers, number of student presentations, publications, patents, partnerships, and collaboration.
- PI should submit the “PI-Self-Assessment” to the Space Grant Management Office NLT 3 weeks prior to Site Visit date via the Box link from NASA HQ. This will allow the Center Specialist time to review the self-assessment and identify questions and concerns. Also, send an email to [hq-space-grant@mail.nasa.gov](mailto:hq-space-grant@mail.nasa.gov) to notify us that you have submitted your self assessment and evidence.



# WHAT DOCUMENTATION DO I NEED TO SUBMIT IN ADVANCE OF THE SITE VISIT?

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Please refer to the [Pre-site visit checklist](#)



# How Do I submit My Site Visit Documentation?



- All site visit documentation is due to NASA HQ no later than 3 weeks before your site visit and should be uploaded to Box via the link that you receive from NASA HQ.
- The Space Grant director and coordinator will receive a link to upload your files from NASA HQ NLT 45 days prior to your site visit. If you do not receive the link more than 45 days prior before your site visit, send an email to [hq-space-grant@mail.nasa.gov](mailto:hq-space-grant@mail.nasa.gov) to request the link.
- Click on the link you receive from NASA HQ and you will see the screen below, where you will be able to upload your files.

**"XX" will be replaced with  
your 2-letter state  
abbreviation**



XX - Upload Site Visit Documents Here

Please upload your site visit documentation here.

Upload files \*



Drag and drop files

Select Files



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# WHAT IS BOX, INC.?

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Box is a cloud-based software that allows us to exchange files with you. This replaces the large file transfer system (LFT), which was decommissioned.



# DO I NEED TO SET UP A BOX ACCOUNT TO SUBMIT MY FILES TO NASA HQ?



- No, you do not need to set up a Box account to submit your files.
- The Space Grant director and coordinator will receive a link to upload your files from NASA HQ NLT 45 days prior to your site visit. If you do not receive the link more than 45 days prior to your site visit, send an email to [hq-space-grant@mail.nasa.gov](mailto:hq-space-grant@mail.nasa.gov) to request the link.
- Click on the link you receive from NASA HQ and you will see the screen below, where you will be able to upload your files.

**"XX" will be replaced with your 2-letter state abbreviation**



## XX - Upload Site Visit Documents Here

Please upload your site visit documentation here.

Upload files \*



Drag and drop files

Select Files



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[stem.nasa.gov](https://stem.nasa.gov)

# HOW WILL I KNOW THAT NASA HQ HAS RECEIVED MY DOCUMENTATION?

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The Space Grant director and coordinator will receive an email confirming receipt of files.



# WHAT SHOULD I EXPECT AFTER SUBMITTING MY DOCUMENTATION?



- After you have uploaded your files to Box, send an email to ([hq-space-grant@mail.nasa.gov](mailto:hq-space-grant@mail.nasa.gov)) with the subject line **“Site Visit Files Uploaded”**
- The Space Grant director and coordinator will receive an email confirming receipt of files from NASA HQ.
- A NASA Center Specialists (NCS) will review your submitted documentation.
- The Space Grant director and coordinator will receive the NCS pre-site visit assessment via email 1 week before the site visit. This allows you additional time to modify your presentation and/or gather additional evidence for use during the site visit based upon the assessment’s ratings.
- If there is a discrepancy between the PI score and the Specialist score, you will have an opportunity to provide clarifying information during the site visit, which may result in score change.
- The Space Grant director and coordinator will receive a copy of the final assessment after the site visit.



# WHAT SHOULD I EXPECT AFTER THE SITE VISIT?

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The SG director and coordinator will receive a copy of the final site visit assessment 2-3 weeks following the site visit.



# RTQs - 1



**Q1:** How detailed does evidence need to be in relation to Section 6? Are you looking for summarized information with invoices referenced or copies of each invoice?

**A1:** Each section/subsection of the assessment will be scored by the PI and separately by the NASA specialists based on the following criteria: *Needs Improvement*, *Meets Expectations*, *Exceeds Expectations*. Therefore, you should submit evidence in sufficient detail, such that it meets the criteria outlined in the table above corresponding to the relevant rating.

1 Needs Improvement	2 Meet Expectations	3 Exceeds
Awardee needs improvement in the stated criteria. Criteria is still in the planning, developing, or in the process stage. Awardee needs more guidance to further develop stated criteria.	Awardee provides evidence and proof of the stated criteria in question. Awardee establishes systems for stated criteria to further develop	Awardee provides substantial evidence of stated criteria in question. Awardee provides evidence of developing unique and individual Consortia goals and objectives. Awardee presents evidence of NASA content being utilized, products developed, partnerships developed, collaboration across Consortia, partnerships with MSIs and. Awardee demonstrates evidence of innovation and expansion beyond initial goals and outcomes identified in the original proposal.
Use this rubric to rate the Year 3 performance (to date) of the Space Grant Awardee for each of the categories that follow.		



- Q2:** Is there a preference to organizing evidence to accompany the PI-self-assessment? For example, should evidence from all sections be submitted as one pdf file with section subheadings? Or should all sections be compiled into separate pdf files (9 total)?
- A2:** The PI should submit any documentation (as separate attachments) relevant to each section of the rubric. If supporting documents for a specific section exceed 2 pages, please indicate by highlighting or indicating where evidence may be found. To clarify, each section should have its own separate PDF, and if the PDF is longer than two pages (e.g. 5 pages), please make sure it's clear where the specific evidence is located within those 5 pages so that the information can be found easily and quickly.
- Q3:** Is the 10-minute consortium showcase presentation (on Previous Award's Past Performance Accomplishments and Achievements) also due 3 weeks prior to the site visit date? If not, will it simply be shown (as noted on the sample site visit agenda) on the day of the site visit?
- A3:** The 10-minium consortium showcase presentation (on Previous Award's Past Performance Accomplishments and Achievements) is due on the day of your site visit, and should be uploaded to your Box folder immediately following your site visit.



# RTQs - 3



**Q4:** Do we need to prepare a formal presentation for the site visit?

**A4:** You should be prepared to show several small presentations or a single presentation that has each corresponding section of the rubric clearly labeled. To clarify, there is no right way or wrong way in terms of presentation format, except that you are required to label each section of your presentation.

**Q5:** Is it acceptable to invite students or student groups to provide testimony for the site visit?

**A5:** Yes, it is acceptable to invite students or student groups to provide testimonials during the relevant section, as long as the testimonials falls within the established site visit guidelines, including the time allotted to the relevant section.



# RTQs - 4



- Q6:** We are to "prepare a 10-minute presentation on Consortium's Previous Award's Past Performance Accomplishments and Achievements." Can we also include highlights and accomplishments from years 1 and 2 of the current award or are we only supposed to focus on the previous 2015-2020 award for this part of the presentation?
- A6:** The 10 - minute presentation on Consortium's Previous Award's Past Performance Accomplishments and Achievements should only include highlights and accomplishments from the previous 2015-2020 award.
- Q7:** Will this presentation be shared with us?
- A7:** Yes, we will release it shortly.
- Q8:** Is there a limit on words/characters for the text portion of each section of the self-assessment?
- A8:** No. The text boxes will automatically expand as needed.



**Q9:** The RTQ talked about the 10-minute presentation of Previous Award Past Performance Accomplishments and Success and that the presentation could be loaded "immediately following" the site visit into the Box folder. My question here is - (1) is there a format / template that they want us to follow? (e.g. video?, slide deck?) and (2) why loaded after the site visit? Who will use the presentation and how will they use it?

**A9:** There isn't a required format for the 10-minute presentation of Previous Award Past Performance Accomplishments and Success. The 10-minute presentation is a required component of your Space Grant site visit. Therefore, your presentation (in any format) should be included in your site visit file to serve as evidence of how you satisfied this required component of the site visit. Currently, there are no plans to use your 10-min presentation; however, should OSTEM decide on a later date to use any parts of your 10-min presentation, you will be notified.



## RTQs - 6



- Q10:** Is there a decision or 'judgement' from NASA made as a result of the Site Visit (e.g. continue the program as is, continue but with changes etc.). If there is a decision, is that done at the end of the site visit day or later?
- A10:** You will receive verbal feedback during your site visit, and written feedback of all outcomes/decisions/judgements within a couple of weeks following your site visit, as it relates to the guidelines/criteria outlined in the Space Grant site visit assessment rubric.
- Q11:** Should the text for each section be a list of evidence or more narrative?
- A11:** You may choose whichever method you prefer (i.e., bulleted or narrative summary).



# RTQs - 7



**Q12:** Should the self-assessment cover years 1-3 of the current award?

**A12:** Site visits during the FY23 site visit cycle shall, at a minimum, focus on Year 3 activities. However, if you would like to add more background information from a previous year (i.e., Year 1 or Year 2) you are not restricted from doing so, as long as the primary focus is on year 3, and any information related to years 1 and/or 2 shall be in the form of highlights. Regardless of which option you choose (i.e., only focus on year 3, OR, focus on year 3 with year 1 and or 2 highlights), the time allotted for each section remains the same. Finally, the 10-minute presentation of the previous award (i.e., FY15-FY19) past performance accomplishments and success is still a FY23 site visit requirement.

**Q13:** Will we have access to share our screen via the WebEx meeting?

**A13:** Yes.



- Q14:** Will we be provided with a link for the meeting or are we expected to create our own Zoom invite?
- A14:** All SG directors and coordinators should have already received a site visit meeting link. If you have not, please send an email to [hq-space-grant@mail.nasa.gov](mailto:hq-space-grant@mail.nasa.gov).
- Q15:** What happens if the presentation / discussion for a section of the rubric goes over the allotted time in the site visit itinerary?
- A15:** The goal is to keep site-visits to the overall prescribed time. If more time is needed on a particular section, please try to shorten other sections by the corresponding amount of time.
- Q16:** Can we get the link to today's slides ASAP?
- A16:** Yes, the PDF of today's presentation will be released as soon as possible.



## RTQs - 9



**Q17:** If my PoP anniversary date falls after my site visit date, the data I submit as part of my site visit evidence will be incomplete. Should we just include a note with our submitted evidence stating the same?

**A17:** Yes.

**Q18:** Our accounting system uses a cumulative budget versus actual-so it would include year 1-3; For budget evidence, the side by side comparison for the budgets, are you requesting a comparison of YR 1 budget /actual, Year 2 budget/actual and Year 3 budget actual or cumulative budget vs actual or year 3 budget vs actual.

**A18:** You should include a side-by-side comparison of Year 3 budgeted/actual. Also, please see Q12/A12 above.



**Q19:** Why are all the self-assessment sections of varying quantities of questions? Are the areas with more questions considered more important?

**A19:** The questions for the site-visits were all developed in collaboration with the OSTEM Performance and Evaluation 2 Team. While some sections have a larger quantity of questions than others, and this may seem to provide a larger focus on those topics that is not the case. Some categories/topics require more questions to get to the same depth of understanding about the consortium's performance in that area, than it might in other areas.



# FY23 Site Visit Schedule



Date	State
14-Sep	CA
17-Aug	IA
24-Aug	LA
31-Aug	ME
27-Jul	NC
13-Jul	NM
15-Jun	NY
21-Sep	OK
18-May	PA
25-May	PR
7-Sep	WA
20-Jul	WI
10-Aug	WV
1-Jun	WY



