



IUCRC: Center for Advanced Forestry Systems
Phase III

NSF Award Number: 1915078, 1916587, 1916552, 1916699, 1916793, 1916155, 1916720

Award period: 12/15/2019 - 11/30/2020

Program Manager: Prakash Balan

Assessment Coordinator: Victoria Hill

Center for Advanced Forestry Systems

Award Period: 12/15/2019 - 11/30/2020

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Summary

Provide brief description of current status of Center focusing on major changes since last Assessment Coordinator report. Address the following: change in sites, change in leadership/governance of the Center/Sites/IAB membership, significant events at IAB companies that might affect participation in the Center.

The Center for Advanced Forestry Systems (CAFS) was established in 2007 to address challenges facing the wood products industry, landowners, and managers of the nation's forestland. This report covers CAFS' first year of their Phase III IUCRC award.

CAFS has been very successful over the past 11 years at providing the administrative and funding structure needed for national, interdisciplinary, scientific collaboration among researchers in these cooperative research programs to make significant progress in the areas of remote sensing, site-specific management prescriptions, and decision-support modeling. The next generation of valuable new knowledge is expected to continue to increase and become fully sustainable through initiatives planned for Phase III of CAFS. This is particularly timely and relevant given the current transitions happening in the forest industry.

University of Maine Site Director Aaron Weiskittel has taken on the leadership role as the Center Director. The Center is now operating with 7 sites. CAFS currently has 11 faculty members and 12 students working on 12 projects. In addition to existing personnel, CAFS leadership is working to recruit new faculty, students and IAB members to grow the Center, and to be sustainable beyond Phase III.

Greg Johnson from Weyerhaeuser is the new IAB Chair, and Tom Trembath from Forest Investment Associates is the new Co-Chair. Victoria Hill is the new NSF-assigned Evaluator for CAFS, replacing Stephen McGregor.

As the world was hit by a global pandemic, both the June 2020 IAB meeting and the December 2020 IAB meeting were virtual. The next meeting is planned to be in person in June 2021 in Snoqualmie, Washington, but that is dependent on the trajectory of the pandemic.

The University of Georgia has officially joined CAFS, having been awarded their Phase III grant in July of 2020. NCSU has had a number of administrative and other issues to deal with during this first year, but are intending to be a fully functioning site for CAFS Phase III. Discussions with Virginia Tech on a potential Phase III grant have been initiated.

Lumber markets and housing startups are always highly volatile, and the global pandemic has created challenges for some of the smaller or medium-sized IAB companies. Fortunately, CAFS has not lost any IAB members through this challenging time.



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Center Leadership

| Role | Name | University/Organization | Email address |
|-----------------|------------------|---------------------------------|---------------------------------|
| Lead Site | Aaron Weiskittel | University of Maine | aaron.weiskittel@maine.edu |
| Supporting Site | Carlos Gonzales | Oregon State University | carlos.gonzalez@oregonstate.edu |
| Supporting Site | Doug Jacobs | Purdue University | djacobs@purdue.edu |
| Supporting Site | Rachel Cook | North Carolina State University | rlcook@ncsu.edu |
| Supporting Site | Mark Coleman | University of Idaho | mcoleman@uidaho.edu |
| Supporting Site | Cristian Montes | University of Georgia | crmontes@uga.edu |
| Supporting Site | Eric Turnblom | University of Washington | ect@uw.edu |
| IAB Chair | Greg Johnson | Weyerhaeuser | greg.johnson8@weyerhaeuser.com |
| Co-Chair | Tom Trembath | Forest Investment Associates | ttrembath@forestinvest.com |

Provide brief description of current leadership structure (can be repeated from prior report if no changes since last Assessment Coordinator report) and focus on major changes since last Assessment Coordinator report, e.g., changes in lead university/site leaders.

A number of leadership changes occurred from Phase II to Phase III. This is the current leadership structure of CAFS:

Center Director and University of Maine Site Director: Dr. Aaron Weiskittel

Oregon State University Site Director: Dr. Carlos Gonzales

Purdue University Site Director: Dr. Doug Jacobs

North Carolina State University Site Director: Dr. Rachel Cook

University of Idaho Site Director: Dr. Mark Coleman

University of Georgia Site Director: Dr. Cristian Montes

University of Washington Site Director: Dr. Eric Turnblom

The University of Washington Site Director suffered a major medical emergency in November 2020 and transition plans are being drafted.



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Faculty Members Directing I/UCRC Research Projects Funded by IAB

| Faculty Name | Institution | Attended 1 st IAB Meeting | Attended 2 nd IAB Meeting | # of Projects |
|-----------------|--------------------------|--------------------------------------|--------------------------------------|---------------|
| John Couture | Purdue University | Y | Y | 1 |
| Jason Cross | University of Washington | Y | Y | 1 |
| Joseph Dahlen | University of Georgia | Y | Y | 1 |
| Jeff Hatten | Oregon State University | Y | Y | 1 |
| Mark Kimsey | University of Idaho | Y | Y | 1 |
| Kasey Legaard | University of Maine | Y | Y | 1 |
| Kim Littke | University of Washington | Y | Y | 1 |
| Cristian Montes | University of Georgia | Y | Y | 1 |
| Andrew Nelson | University of Idaho | Y | Y | 1 |
| George Newcombe | University of Idaho | Y | Y | 1 |
| Eric Turnblom | University of Washington | Y | N | 2 |

Provide brief description, no more than one paragraph per site, of activities concerning participation of current faculty researchers in the I/UCRC. Highlight major changes since last Assessment Coordinator report, e.g., addition of new faculty researchers, loss of faculty researchers, attendance of faculty researchers at the IAB meeting.

New CAFS project scientists at several sites have been a focus for broadening participation. Many of these new CAFS project scientists are either early-career or research faculty. Several conference calls among CAFS faculty occurred during the past year to discuss ongoing and future CAFS projects. In addition, a Slack channel for CAFS participants was created, which helped to foster additional discussion and sharing of data.

Despite the significant disruptions created by the global pandemic for faculty, the center has increased faculty and has not lost any faculty.



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Students Working on I/UCRC Research Projects Funded by IAB

| Student Name | Level & Year | University | # of projects | Graduation Date | Internship |
|-------------------|--------------|-------------------------|---------------|-----------------|------------|
| Ryan Smith | M | University of Maine | 1 | 2021 | |
| Bishnu Wagle | PH | University of Maine | 1 | 2022 | |
| Cen Chen | PD | University of Idaho | 1 | - | |
| Abigail Ferson | M | University of Idaho | 1 | 2021 | |
| Ehren Moler | PD | University of Idaho | 1 | - | |
| Anil Koirala | PH | University of Georgia | 1 | 2021 | |
| Holly Munro | PD | University of Georgia | 1 | 2021 | |
| Sylvia Park | M | Purdue University | 1 | 2021 | |
| Indira Paudel | PD | Purdue University | 1 | - | |
| Geoffrey Williams | M | Purdue University | 1 | 2021 | |
| Maxwell Wightman | PD | Oregon State University | 1 | - | |
| Stephanie Winters | M | Oregon State University | 1 | 2021 | |

* U = undergraduate, BS = completed bachelor's degree, M = master's, PH = Ph.D.

Provide brief description, no more than one paragraph per site, of current student researchers focusing on highlights and major changes since last Assessment Coordinator report, e.g., addition of new student researchers, graduation of student researchers.

Similar to faculty, several new graduate students were added to the CAFS roster. Most of the graduate students are new and early in their research. Three graduate students presented at the December 2020 IAB meeting and there was a successful CAFS INTERN project presented at the June 2020 IAB meeting.



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Membership Activity Table

| Members in Attendance at the 1st IAB Meeting of the Center funding year | | |
|---|----------------------------|-----------------------------|
| Site | Member | Number in Attendance |
| North Carolina State University | CMPC | 4 |
| Oregon State University | Cascade Timber | 2 |
| Purdue University | IHLA | 1 |
| University of Georgia | Arborgen | 1 |
| University of Georgia | Greenwood Resources | 1 |
| University of Georgia | FIA | 1 |
| University of Georgia, University of Washington | Rayonier | 3 |
| University of Idaho | Potlatch Deltic | 2 |
| University of Idaho | USDA | 1 |
| University of Maine | Acadian Timber | 1 |
| University of Maine | LandVest | 1 |
| University of Maine | JD Irving | 1 |
| University of Maine, University of Washington, North Carolina State University, Purdue University | American Forest Management | 4 |
| University of Washington | Campbell Global | 1 |
| University of Washington | WA DNR | 2 |
| University of Washington | Stimson Lumber | 1 |
| University of Washington | Quinault | 3 |
| University of Washington | Port Blakey | 1 |
| University of Washington | LRTCO | 1 |
| University of Washington | Hampton Lumber | 1 |
| University of Washington, Oregon State University | Weyerhaeuser | 3 |
| University of Washington, University of Georgia | Green Diamond | 3 |
| University of Washington, University of Idaho | HNRG | 2 |



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Members in Attendance at the 2nd IAB Meeting of the Center funding year

| Site | Member | Number in Attendance |
|------|---------------------------------|----------------------|
| OSU | Rayonier | 2 |
| OSU | Lone Rock Timber Company | 1 |
| OSU | Port Blakely | 1 |
| OSU | Weyerhaeuser | 1 |
| OSU | Hancock Natural Resources Group | 1 |
| OSU | WA DNR | 2 |
| OSU | Hampton Lumber | 2 |
| OSU | American Forest Management | 2 |
| OSU | Stimson Lumber | 1 |
| PU | American Forest Management | 2 |
| PU | Van Ek Foundation | 1 |
| UGA | Hancock Natural Resources Group | 1 |
| UGA | Forest Investment Associates | 1 |
| UGA | Weyerhaeuser | 1 |
| UGA | Rayonier | 2 |
| UI | WA DNR | 2 |
| UI | US Forest Service | 1 |
| UI | Potlatch Deltic | 1 |
| UI | Hancock Natural Resources Group | 1 |
| UM | American Forest Management | 2 |
| UM | Acadian Timber | 1 |
| UM | US Forest Service | 1 |
| UM | JD Irving | 1 |
| UM | Weyerhaeuser | 1 |
| UM | Seven Islands Land Company | 2 |
| UM | Landvest | 2 |
| UW | WA DNR | 2 |
| UW | American Forest Management | 1 |
| UW | Hampton Lumber | 2 |
| UW | Hancock Natural Resources Group | 1 |
| UW | Rayonier | 2 |
| UW | Weyerhaeuser | 1 |
| UW | Port Blakely | 1 |
| UW | Lone Rock Timber Company | 1 |



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Provide brief description of current IAB membership focusing on major changes since last AC report.

First Meeting of the Year

No major changes to IAB membership

Second Meeting of the Year

Membership remains robust with no major changes despite high uncertainty in the current economy.



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IAB Members That Have Left the Center

Provide a brief description of the context regarding reasons for leaving and extent to which these reasons were influenced by unmet expectations regarding quality of research, Center performance, Center leadership, or other aspects of Center performance.

No primary or secondary IAB members have left CAFS.

Management of IAB Member Contact Information

Explain methods used by the Center to maintain contact information of primary IAB member representatives, as well as alternate delegates within the Member Company, in case the primary member representative is unreachable?

The lead site maintains an up to date contact list for the CAFS IAB membership, which is quarterly reviewed and updated by the individual sites. Regular CAFS emails are sent.



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Use of NSF Required Governance Practices for Center

(Source: <http://www.nsf.gov/eng/iip/iucrc/requirements.jsp>)

| NSF Governance Requirement | Yes/No/P |
|--|----------|
| An I/UCRC shall be composed of one or more universities, each of which is a Site. | Yes |
| Each Site shall name a Director who shall be the Principal Investigator for that Site's NSF grant. | Yes |
| Each Site shall create a University Policy Committee composed of administrators from that university to oversee compliance of that Site with the university's policies and procedures. | Yes |
| A Director shall be designated for the entire I/UCRC. She/he shall be either one of the Site directors or a co-principal investigator on one of the Site awards. | Yes |
| The I/UCRC shall define a membership structure for non-university, fee-paying members. | Yes |
| I/UCRC members may include for-profit and not-for-profit organizations (public or private), state and local agencies, or non-NSF federal agencies. A complete definition is found in the solicitation. | Yes |
| The membership structure shall define the types of members, member fees, and the rights of members, including all voting and governance rights, as per the conditions found in the solicitation. | Yes |
| The I/UCRC shall have an Industry Advisory Board (IAB) with one representative from each member. NSF, and/or its authorized representative, has the right, but not the obligation, to attend I/UCRC IAB meetings in their entirety. | Yes |
| The IAB shall elect a Chair. | Yes |
| The IAB shall meet at least twice per year with the meeting schedule and agenda being developed collaboratively with NSF. | Yes |
| The I/UCRC Leadership Team shall include all Site Directors, I/UCRC Director, and IAB Chair. | Yes |
| All I/UCRC members shall sign a single membership agreement approved by NSF and based on the template provided by NSF. | Yes |
| The membership agreement shall provide that all fee-paying members shall have non-exclusive, royalty-free rights to all intellectual property created by any research funded using member fees. | Yes |
| The I/UCRC shall create Bylaws that define its policies and operations. | Yes |
| The Bylaws shall adhere to the membership agreement and be approved by the IAB and NSF. | Yes |
| The Bylaws shall define a voting process for the approval of all research projects funded using member fees. | Yes |
| Research performed by the I/UCRC shall be pre-competitive in nature, and it shall be shared, directed, and funded by the fee-paying members. | Yes |
| All research projects funded by member fees shall be approved by the IAB using the voting process defined in the Bylaws. | Yes |
| NSF shall designate an NSF-funded Assessment Coordinator who shall attend all meetings of the IAB in their entirety, provide guidance to the I/UCRC, and collect data for NSF on the performance of the I/UCRC, from the IAB as well as the Center/Site Directors. | Yes |
| The I/UCRC shall submit an annual report to NSF summarizing the activities of the I/UCRC, including all Sites, and in accordance with NSF's reporting requirements. | Yes |

Highlight non-compliant practices and discuss reasons for non-compliance.

n/a



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Center Collaboration and Alignment with NSF Practices

Please provide description of the Center status relative to each item below. If problems exist, AC should try to identify the source(s) of the problem and suggest potential remedial measures to NSF in the narrative box following each item.

Interaction/synergy among all Center Stakeholders (Academics and IAB members at meetings and in between meetings). Examples include: social hours and banquets during IAB meeting, video or telephone conference calls between IAB meetings.

Provide brief discussion of frequency and quality. Highlight unique or highly effective practices, as well as weak and ineffective practices.

These types of interactions and synergy have been an important part of CAFS IAB meetings. This has included social events after the business meeting. Unfortunately, the pandemic has prevented these types of interactions. Instead, CAFS has used video conference calls with both faculty and IAB membership between IAB meetings.

Describe the level of collaboration across university sites and among the Center's major stakeholders (Center and site leaders, IAB chair, faculty researchers, student researchers, and Center support staff) and its impact on Center performance.

Provide brief discussion of extent and quality of collaboration and its impact on performance of the Center, e.g., use of faculty and student researchers from multiple university sites on the same research project versus research projects conducted with researchers from a single university (silos of research), proportion of all research projects that are collaborative.

CAFS has always been a highly collaborative Center with a key focus on integrated research projects that include multiple university sites. Nearly all projects include involvement of either early-career faculty or students.

The number of IAB-funded research projects employing faculty and/or student researchers from more than one university site is 12.

The number of IAB-funded research projects employing faculty and/or student researchers from only one university site is 0.



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Describe the level of interaction within the IAB with respect to the Center mission/ operations and how this interaction influences performance of the Center.

Provide brief discussion of extent and quality of interaction among IAB members and its impact on performance of the Center, e.g., most or all IAB members participate in discussions and contribute to decision making versus a small number of IAB members that dominate discussions and decision making.

The IAB membership of CAFS is diverse across regions and types of organizations. Engagement and participation in IAB meetings is generally high without domination by a few organizations. The IAB is highly supportive of current CAFS leadership and the direction being taken in Phase III.



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Research Roadmap

| Research Roadmap | Responses |
|--|-----------|
| Does the Center have a Research Roadmap that clearly identifies its research strengths/weaknesses and opportunities/threats? | Yes |
| Is the IAB directly involved in the Research Roadmap creation/updating? | Yes |
| Does the Roadmap clearly show the research gaps and voids that need to be filled? | Yes |
| Does selection of member-funded research projects reflect gaps and voids identified in the Center Roadmap? | Yes |

Provide brief discussion of quality of the Center’s research roadmap and how it is used to guide decision making, new project selection, and strategic growth of the Center, e.g., selection of new research projects, addition of new university research sites, recruitment of new IAB members.

The roadmap has served as a solid foundation for identifying key sites and IAB members for creating a conceptual framework that provides the necessary context for ensuring successful new project proposals and recruitment of new IAB members. The roadmap has been a key part of the increased engagement in Phase III.



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Compliance with NSF Pre-IAB Meeting Practices

| Pre-IAB Meeting Practice | 1 st IAB Meeting | 2 nd IAB Meeting |
|--|-----------------------------|-----------------------------|
| Collect and make accessible in advance of meetings Executive Summaries (following the template found at http://www.nsf.gov/eng/iip/iucrc/exec_summary_portfolios.jsp) for all new project proposals to be presented at the IAB meeting. | Yes | Yes |
| Clearly document the Center project history. List completed projects and currently funded projects. List the cost, and beginning and end dates of each. Update this document prior to every meeting and provide to the IAB. | Partial | Partial |
| Organize an executive summary of Center financial information since the last meeting. Include major categories of income and sources, outlays and purpose, and balances. Keep income from memberships (use governed by the membership agreement, bylaws) separate from other income. Given this overall picture, show funds allocated to current projects and funds remaining for allocation by the Center to new projects. Conservatively project future funds for planning purposes. | Partial | Partial |
| Distribute NDA/CDA documents to all invited guests prior to the meeting with the expectation they be completely executed prior to the meeting. | Yes | Yes |
| Ensure all printed or electronic material conveying results of the Center's research clearly state that the content is Center Proprietary and that the Terms of the Center membership agreement apply. | Yes | Yes |
| Develop and distribute in advance a preliminary agenda for the meeting, outlining main meeting events and start/stop times with which people can plan travel. | Yes | Yes |
| Distribute a detailed final agenda just prior to the meeting. Effective agendas include: | Yes | Yes |
| Summary of the State of the Center by Center leadership | Yes | Yes |
| Meeting activities that support interaction between industry members as well as with faculty and students, including: poster sessions, industry presentations, and industry-driven mentoring session | Yes | No |
| Adequate time for LIFE assessment form completion after every project | Yes | Yes |
| Adequate time for IAB closed door meeting | Yes | No |

Briefly highlight and discuss pre-meeting practices the Center is doing exceptionally well, not doing well, or not doing at all.

First Meeting of the Year

Due to Covid-19, this was a virtual meeting, so all of the "normal" elements of an IAB meeting were compressed in the interest of time. The Center did a good job of providing information ahead of time, but in the future could make sure the financial position of the Center is addressed in their reporting.

Second Meeting of the Year

This meeting was a review of funded projects and was conducted virtually. There was no social or mentoring activities or a closed-door meeting. Detailed information about the Center and their projects was available on the Center website prior to the meeting.



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Compliance with NSF IAB Meeting Practices

| IAB Meeting Practice | 1 st IAB Meeting | 2 nd IAB Meeting |
|--|-----------------------------|-----------------------------|
| Sign in all attendees. | Yes | Yes |
| Provide an attendee list to all of preregistered attendees. | Partial | Yes |
| And distribute an updated list at the close of the meeting. Most effective lists have faculty, students & postdocs, IAB members, and NSF grouped in their respective categories. | Partial | Partial |
| List must include complete contact information, must identify "guests" among the members from current members. | Partial | Partial |
| To showcase students, indicate if Master's Degree or Ph.D. and year of anticipated graduation. | Partial | Partial |
| At Point of Registration, "Non-Disclosure Form" is signed by each non-member industrial attendee and collected. | Yes | Yes |
| Deliver a Center report to the Center that brings members and faculty up-to-date on the Center and the university research site(s) including: | Yes | Yes |
| A review of the Center's vision and research roadmap and/or explicit set of Center priorities. | Yes | Yes |
| An update on the current Center membership. | Yes | Yes |
| Attention to outputs of interest of members and faculty (technology transfer impact, product, etc) from recently completed projects. | Yes | Yes |
| An update on publication/awards and other highlights. | Yes | Yes |
| An opportunity for discussion and questions by IAB members about the state-of-the-Center. | Yes | Yes |
| An overview of the upcoming meeting. | Yes | Yes |
| Material related to projects presented throughout the meeting (including posters). | Partial | Yes |
| Use a common slide master template for all presentations across all sites. Be conscious of maintaining Center branding. Slides should reflect the following (as appropriate): | Yes | Yes |
| Proposed projects should include proposed schedule, overall and first year deliverables, and proposed budget. | Yes | Yes |
| Ongoing projects must clearly state progress, milestones achieved, and deliverable status from those originally proposed. | Yes | Yes |
| Final project reports should summarize all deliverables and outcomes as well as new directions that have emerged from the work. | Yes | Yes |
| Enforce strict time limits for each project presentation and item in the agenda. | Yes | Yes |
| "Closed Meeting" sign posted; materials labeled "Center Proprietary". | Yes | Yes |
| Meeting activities are included that support industry/university networking; such as poster sessions, and industry-driven mentoring sessions. | Yes | No |
| Project LIFE assessment forms are completed and discussed by the IAB at each meeting. | Yes | Partial |
| IAB closed door meeting (NSF and IAB members only): | Yes | No |
| Work with your IAB Chair the agenda for the IAB closed-door meeting that provides an opportunity for members to raise issues about Center policies, procedures and research activities, and use of and modification of by-laws if any. | Yes | No |
| Ensure that the IAB has the comprehensive financial update of the Center to enable them to make informed funding decisions. | Partial | No |



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|---|-----|-----|
| Provide the IAB Chair with a well-defined procedures and timetable for selection of research projects. | Yes | No |
| Action Items and Plans for Next Semiannual Meeting Make sure to have reviewed the IUCRC Master Travel Calendar and have consulted with the NSF prior to the meeting regarding the availability of your preferred meeting dates. | Yes | Yes |

Briefly highlight and discuss IAB meeting practices the Center is doing exceptionally well, not doing well, or not doing at all.

First Meeting of the Year

The items listed as "Partial" are primarily due to the meeting being held virtually. Given the challenging situation, the Center did a good job of hosting the meeting.

Second Meeting of the Year

This was a virtual meeting that covered progress on existing projects. Attendee lists are available upon request. Due to the virtual nature of the meeting a social hour was not held. The LIFE system was not used, but a brief survey was conducted after each project that collected IAB satisfaction ratings with the presented projects. There was not a closed-door session, but IAB members were given the opportunity to ask questions about any issues they might have. Dates for the next meeting were set, but it remains to be seen if the meeting will be in person or virtual, and is dependent on the trajectory of the pandemic.



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Compliance with NSF Post-IAB Meeting Practices

| Post-IAB Meeting Practice | 1 st IAB Meeting | 2 nd IAB Meeting |
|---|-----------------------------|-----------------------------|
| Send meeting outcomes to Center participants. | Yes | Yes |
| Forward copy of IAB meeting minutes to IAB. | Yes | Yes |
| Confirm next meeting date. | Yes | Yes |
| Maintain an up-to-date and good quality centralized webpage for the Center with a secure area (password protected for members) where to promptly save meetings information, research products, and any material related to Center activities. | Yes | Yes |
| Center facilitates opportunities for project related communication (e.g., newsletters, regularly scheduled project conference calls) with the IAB between meetings. | Yes | Yes |
| Promptly inform the IAB of any invention and publication generated by the Center in compliance with the terms set in the membership agreement and bylaws. | Yes | Yes |
| Provide accurate and up-to-date information for the IUCRC directory on the IUCRC website. Instructions for updating here. | Yes | Yes |

Briefly highlight and discuss Post-IAB meeting practices the Center is doing exceptionally well, not doing well, or not doing at all.

First Meeting of the Year

n/a

Second Meeting of the Year

The Center set a next meeting date, and all Center information regarding meetings (presentations, minutes, etc.) is available on the Center website.