**NOAA RESTORE Science Program Site Visit Guidance**

This form provides guidance for the execution of RESTORE Science Program site visits. Site visits are an opportunity to review the performance, quality, and relevance of ongoing projects funded by the RESTORE Science Program.

*Performance* refers to the effectiveness and efficiency with which project activities are organized, directed, and executed. An evaluation of *performance* considers how project activities are conducted and progressing relative to actions, tasks, and milestones as laid out in the project proposal and agreed upon *Milestones and Gantt Timeline.*

*Quality* refers to the merit of the project’s findings and outputs within the scientific and management communities. An evaluation of *quality* considers the novelty, soundness, accuracy, and reproducibility of a specific body of research or development, as represented by the methods used and any findings and outputs (*i.e.*, products) delivered by a project.

*Relevance* refers to the value of the project’s findings and outputs beyond the scientific community. An evaluation of *relevance* considers the broader benefits of the project, including its potential and actual impact. *Relevance* is measured by how well the findings and outputs from a project support the needs of end users and contribute to improved understanding and management of the Gulf of Mexico ecosystem.

Site visits should occur approximately once per project year, and include the lead investigator, key members of the project team, and representatives from the RESTORE Science Program. Representatives from NOAA’s Grants Management Division (GMD) may also attend. The lead investigator and the Science Program’s federal program officer (FPO) or technical monitor (TM) determine the location, which may be at the lead institution, a partner institution, a field work location, or may leverage a location where the research team happens to be (*e.g.*, a conference) so long as there is dedicated time for a thorough review. All costs for participation by the lead investigator and research team are covered by the project’s award other than those for Science Program or GMD representatives; those are covered by the Science Program or GMD, respectively.

Site visits should cover progress made and challenges to date and also look forward at least one year towards upcoming activities and anticipated challenges.Site visits should include a thorough review of the research team, the science, application of the science and engagement with end users, data management, financial management, and environmental compliance and permit actions. Site visits may also include inspection or review of facilities and equipment, field sites, environmental compliance and permit controls, accounting and administrative controls, special award conditions, and other items deemed necessary. The site visit should conclude with a status review of a project’s *Milestones and Gantt Timeline*, and a discussion of mitigation measures for tasks that are ‘behind schedule’.

**An agenda for the site visit should be developed by the lead investigator and TM and approved by the FPO at least two weeks in advance of the meeting.**

1. Research team: Review the responsibilities of the lead investigator and each member of the project team.
   1. Address whether project team members are performing the duties originally described in the final approved proposal and include any changes and their rationale. Also address any personnel changes since the project was awarded, the impacts of those changes, and how you intend to mitigate them.
   2. Provide an update on any vacant positions (*e.g.*, graduate students, postdocs, technicians) on the project team and include what recruiting efforts are being pursued, when the position(s) will likely be filled, how the vacancy(ies) impact the project, and what steps are being taken to mitigate those impacts.
   3. Provide an overview of project personnel supervision -- how are project personnel supervised and what procedures are in place for quality assurance and quality control?
   4. Provide an overview of the schedule for project team meetings, a summary of recent meetings, and plans for future meetings. As applicable, include plans for data integration, product design development, co-authored manuscripts, development of outreach materials, agendas for workshops, etc.
2. Looking back: Review project and end user engagement activities.
   1. *Science*
      1. Referencing your project’s *Milestones and Gantt Timeline,* provide an overview of the scientific aspects of the project to date and include what was done and by whom, why it was done, how it was done, any next steps including lessons learned, and how the work may be applied. Each investigator should briefly share their individual results to date (if any).
         1. Provide an overview of any fieldwork undertaken to date or since the last site visit. Describe the plan for the fieldwork (*e.g.*, goals, personnel, location, equipment needs, sampling design, etc.) and assess it against what actually occurred, including any approaches proposed or taken to mitigate challenges or issues.
      2. Provide an update on data management activities and status of datasets.
      3. Provide an update on all activities associated with environmental compliance controls and best management practices. Include updates, as appropriate, for field and laboratory work.
   2. *End user engagement*
      1. Referencing your project’s *Milestones and Gantt Timeline*, provide a synopsis of any end user engagements to date or since the last site visit. Include the type of interaction(s) (*e.g.*, conference presentation, workshop, one-on-one), what was communicated, how the information was shared (*e.g*., paper document, electronically), what feedback was provided by the end user, and any plans for follow up with the end user.
      2. Provide an assessment of those end user engagements:
         1. What type of interactions worked best and why? How could interactions go better?
         2. How do you intend to apply the feedback received from your end users?
         3. Is there sufficient support from project team members for the interactions? How about from the Science Program? If not, what improvements could be made?
      3. Provide updates on how end users have applied your findings or outputs.
      4. Provide updates on any newly identified end users.
3. Looking forward: Review project and end user engagement plans for the next year.
   1. *Science*
      1. *Referencing your project’s Milestones and Gantt Timeline, provide an overview of science*  activities that are planned for the next 12 months, and include what the activity is, why it is being done, which investigator is executing the activity, and when it is expected to start and finish. Include planned fieldwork, lab analyses or experiments, and investigator meetings/webinars. Also include any changes in field or lab equipment or methods from previous efforts for this project.
      2. Provide an update on planned data management activities and datasets.
      3. Provide updates on the status of required renewals for any permits and Institutional Animal Care and Use Committee (IACUC) approvals. Address any anticipated issues with compliance or permitting.
   2. *End User engagement*
      1. *Referencing your project’s Milestones and Gantt Timeline, provide an overview of* planned end user interactions for the next year, and include the types of interactions (*e.g.*, conference presentation, workshop, one-on-one) and their goals. In particular, focus on (1) how you intend to facilitate the transfer of findings and outputs from your project to end users, (2) how you will approach getting feedback on what you provide, (*e.g.*, post-workshop survey) and (3) how you intend to incorporate that feedback.
   3. *Contingencies*
      1. Discuss plans to deal with unexpected events that may disrupt the project timeline. For example, hurricane contingency plans for research activities, loss of key personnel, *etc*.
4. Project administration
   1. Address whether the project is being administered consistent with the final approved proposal. Include any substantive changes that have been made and the rationale for the change.
   2. Provide an overview of changes to the proposed budget and the rationale for those changes.
   3. Provide an overview of the execution of all contracts and subawards associated with the project and provide an update on any changes from your approved proposal.
   4. Provide an overview of equipment purchased using funds from this project. Is the equipment meeting the needs of the project? Address any equipment issues and plans for mitigating those issues. Provide an update for how equipment is being tracked, labeled, and safeguarded.
5. Additional questions
   1. [The federal program officer or technical monitor(s) may insert additional questions or topics for the project lead investigator in this section].