

TRC Services Checklist

3025 Boardwalk, Ann Arbor, MI 48108-3266
 Voice: 734-995-4936 Fax: 734-995-4004
 E-mail: trc@ncms.org

First Name _____

Last Name _____

Title _____

Company _____

Street Address _____

City _____

State/Zip Code _____

Telephone _____

Fax _____

E-mail Address _____

Project Planning

- Planning and organizing meetings at client agreed upon sites, issuing invitations and agendas
- Briefing potential participants in the collaborative project on the issues and challenges they face
- Providing guidance on maintaining anti-trust immunity
- Drafting a preliminary statement of the collaborative's objectives for development by the meeting participants
- Preparing and circulating minutes of meetings with action items and schedules of follow-up activities
- Optional tasks:
 - Identifying additional potential project participants
 - Industry associations and research using on-line information services
 - Reviewing the technology state-of-the-art and performing patent searches
 - Identifying potential funding sources
 - Developing relations with appropriate government agencies as requested by the collaborative project's management team
 - Identifying and evaluating the impact of government regulations
 - Preparing project justifications with the guidance of the collaborative project's management team and contributions from participants

Project Organization

- Developing the statement of work for the collaborative project under the guidance of the collaborative project's management team and participant contribution
- Developing the work breakdown structure (WBS)
- Detailing the tasks, identifying resources and responsibilities, and specifying the deliverables
- Developing the schedule, including identifying tasks on the critical path
- Developing a project monitoring system to track progress and maintain the WBS
- Reporting technical and financial progress
- Monitoring and accepting deliverables
- Developing contingency plans
- Establishing procedures to close the project
- Developing a project manual describing the management plan, participants' roles and responsibilities, project tracking procedures, evaluating and accepting deliverables, and procedures to address environmental, health and safety issues
- Preparing project budgets with the guidance of the collaborative project's management team and participant contributions
- Drafting the project collaborative agreement including consideration of intellectual property rights

- Optional tasks:
 - Maintaining a technology awareness program to monitor advances in technology
 - Briefing project participants on collaborating with government agencies
 - Developing relations with appropriate government agencies
 - Identifying and evaluating the impact of government regulations
 - Drafting and negotiating cooperative R&D agreements (CRADAs)

Project Administration

- Administering the collaborative project's quarterly management team meetings
 - Planning and organizing meetings
 - Preparing and issuing meeting invitations and agendas
 - Facilitating meetings
 - Preparing and circulating minutes of the meetings with action items and a schedule of follow-up activities
- Administering project communications
 - Scheduling and facilitating telephone conference calls, circulation of minutes, action items and schedules of follow-up activities
 - Maintaining central project files
 - Managing the production and distribution of progress reports and the final report
- Providing contract services
 - Awarding sub-contracts competitively or sole-source as directed by the collaborative management team
 - Closing the project
- Filing anti-trust reports to the Department of Justice under the *National Cooperative Research and Production Act of 1984* (amended in 1993)
- Providing accounting services
 - Maintaining financial records
 - Invoicing quarterly for cost-sharing reports
 - Preparing quarterly cost-sharing reports
 - Preparing quarterly financial reports
 - Opening and disbursing funds from escrow accounts, if required
 - Updating project budgets annually
- Optional tasks:
 - Managing project technical meetings
 - Preparing final reports
 - Filing for patents
 - Briefing project participants on collaborating with government agencies
 - Developing relations with appropriate government agencies
 - Identifying and evaluating the impact of government regulations
 - Drafting and negotiating cooperative R&D agreements (CRADAs)