Tips for Panel Introduction

Panel Intro Call

Introductions and Agreements
- Allow each Reviewer to give their background and level of experience with staff review
- Intros and scheduling can be done via email or phone for a two person panel
- Establish optimal means of communication for each Reviewer (e.g., preferred email address, phone number)
- Review the expectations and schedule, and set the dates and times of the Panel Discussions

I. Welcome and Introductions
Background
A. What s/he brings to review process:
   1. Job experience
   2. Past participation in grant reviews
   3. Personal information
   4. Work style

i. Review Process and Responsibilities
   a. Ensure everyone understands where they are (Orientations completed, etc)
      i. Ensure everyone understands the tasks required during the review (Timeline)
      ii. Assign Lead Reviewers to each application to help with discussion

ii. Expectations
   a. Create agreements in preparation for a smooth review
      i. Reminder that applications should be read in order by established Sets

iii. Correct/Gather Additional Reviewer Contact information
   a. Allows Reviewers to contact each other at most convenient numbers, or on particular days
   b. Encourage Reviewers to keep each other’s information handy

II. Reminder to check for Conflict of Interest
   a. Ask Reviewers to review the applications and form I to flag any potential Conflicts of Interest early, if they have not done so already
   b. COIs may require readjusting assignments or the order in which you review applications

III. Other Miscellaneous Points and Agreements
   a. Reminder to use the samples and resources on the shared drive
   b. Share tips and helpful hints (anyone can contribute)
   c. Method of communication
      i. Email preferred, phone as follow-up or time-sensitive?
      ii. Reminders will/will not be sent
      iii. How to label documents?
      iv. Dates/times for Panel Check-In calls

IV. Working with CNCS Staff Liaisons
   a. GARP Liaisons will be assisting everyone through the Review
   b. Program Officer Liaison will provide feedback on the REVIEW FORMs. Reviewers should copy the GARP Liaison on e-mails to the QUALITY CONTROL in order to keep them apprised of progress
Tips for Panel Introduction

**Post-Panel Introduction Call email (Template for follow up with panel)**
Hello Panel #___! Below is the information that we discussed and agreed on for this Staff Review.

**Name of Reviewer:**
City & Time Zone:
Notes about Contact/Schedule:

**Name of Reviewer:**
City & Time Zone:
Notes about Contact/Schedule:

(if there is an additional reviewer) **Name of Reviewer:**
City & Time Zone:
Notes about Contact/Schedule:

**Order for Reviewing Applications**

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<thead>
<tr>
<th>Set</th>
<th>Legal Applicant</th>
<th>Panel Discussion Date</th>
<th>Lead Reviewer</th>
<th>Review form to QC by (date)</th>
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**Preparing for the Review Process**
- Read Notice/Orientations
- Read applications
- Take notes/comments responding to Selection Criteria
- Submit REVIEW FORM to QUALITY CONTROL after discussion
- Incorporate QUALITY CONTROL feedback

**Schedule Panel Discussion Calls**

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<thead>
<tr>
<th>Day</th>
<th>Date</th>
<th>Time</th>
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Panel may also wish to schedule a “Panel Closing Call” for May 2 to tie up any loose ends.