

# Tips for Panel Introduction

## FY 2016 Social Innovation Fund Pay for Success Cooperative Agreement

### **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, but phone usually cuts down on back and forth
- Panel Coordinator will set up Intro call
- 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
- Establish who the Lead Reviewer is for each application.

#### **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 calls

#### **IV. Working with CNCS Staff Liaisons**

- a. GARP Liaisons will be assisting everyone through the Review

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- b.** Panel Coordinator will provide feedback on the PCFs.
- c.** POL/Jenni Stoff will provide guidance on interpreting the selection criteria and Notice of Funding. Panel Coordinator will communicate any questions to POL and then share answers with panel members.
- d.** Reviewers should copy the GARP Liaison on emails in order to keep them apprised of progress
- e.** Once any Panel Coordinator feedback is incorporated, Lead Reviewer should email final PCF to GARP Liaison.

#### 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

	Set	Legal Applicant	Panel Discussion Date	Lead Reviewer	PCF to PC by (Date)
1	A				
2	B				
3	B				
4	C				
5	C				
6	C				
7	D				

#### Preparing for the Review Process

- Read Notice/Orientations
- Read applications
- Take notes/comments responding to Selection Criteria
- Submit PCF to PC after discussion
- Incorporate PC feedback

#### Schedule Panel Discussion Calls

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Day	Date	Time	Time Zone	Application/Lead Reviewer

Panel may also wish to schedule a "Panel Closing Call" for March 9 to tie up any loose ends.