

Panel Intro Call (Guidance for Panel Coordinator)

Introductions and Agreements

- Allow each Reviewer to give their background and level of experience with grant application reviews
- 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

- a. Background
 - i. What s/he brings to review process:
 1. Job experience
 2. Past participation in grant reviews
 3. Personal information
 4. Work style
- b. Review Process and Responsibilities
 - i. Ensure everyone understands where they are (Orientations)
 - ii. Ensure everyone understands the tasks required during the review (Timeline)
- c. Expectations
 - i. Create agreements in preparation for a smooth review
 1. Reminder that applications should be read in order by established Sets
- d. Correct/Gather Additional Reviewer Contact information
 - i. Allows Reviewers to contact each other at most convenient numbers, or on particular days
 - ii. 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 COI form briefly after the call to flag any potential Conflicts of Interest early

III. Other Miscellaneous Points and Agreements

- a. Advise Reviewers of your feedback-style, expectations
- b. Remind Reviewers to read the Example IRW
- c. Share tips and helpful hints (anyone can contribute)
- d. After the Panel Coordinator Check-Ins, the PC will send out updated information regarding Closeout, etc.
- e. 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 (naming convention)
 - iv. Dates/times for Panel Check-In calls

After the Panel Intro Call, you should send out an email to your panel recapping agreements and deadlines so that everyone is on the same page. **A template is on the following page.**

IV. Working with CNCS Staff Liaisons

- a. GARP Liaisons will be assisting everyone through the Review
- b. Program Officer Liaison will arrange check-in with panel prior to Panel Discussion, and as needed throughout the review. Should be contacted through me (the Panel Coordinator) on the panel's behalf.
- c. Editors will receive and send the IRWs through the PC. They will provide feedback just once for each IRW, after that it will be between the PC and the Reviewer to approve the IRWs.

Post-Panel Introduction Call email (Template for follow up with panel)

Hello SIF Panel #_! Below is the information that we discussed and agreed on for this External Review.

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

Order for Reviewing Applications

	Set	Legal Applicant	IRW Completed by (Date)	Panel Discussion Date
1.	A			
2.	A			
3.	B			
4.	B			

Administrative Forms

- SIGNED Conflict of Interest Form
- SIGNED Participation Agreement

Preparing for the Review Process

- Read Notice
- Read applications
 - Read thoroughly on your own
 - Use Individual Reviewer Worksheet and the Review Rubric
- Submit to me by _____ for PC review
- Revise after Panel Discussion

Schedule Panel Discussion Calls

Panel Discussion Calls (2) - _____, _____, at _____
 (Day) (Date) (Time, Time Zone)

_____ , _____, at _____
 (Day) (Date) (Time, Time Zone)