Tips for Working with Your EIR Program Officer

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Education Development Center

Center for Children and Technology

A Little Background About Our Project

Making Rich Mathematics Accessible to All Students in Grades K-5

MATH FOR ALL

Funding Partners

NSF

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Importance of Building A Good Relationship with Your Program Officer

- Keep program officer up to date about **what is happening with your project**

- Solicit **assistance and advice** to help your project succeed

- Keep program officer informed about **challenges** and request **approval for changes** you need to make

The Role of the EIR Program Officer (from EIR Grantee Orientation)

- Maintains **regular communication** with project director

- Provides **advice/assistance**

- Oversees **project spending**/drawdowns

- Executes **administrative actions**/approves changes to the grant activities or budget

- Reviews all **project reports**

- Conducts **site visits**

Issues to Discuss with Program Officer (from EIR Grantee Orientation)

- Delays or changes in **project activities or timeline**

- Changes to any of your **partners or school sites**

- Changes to your **evaluation plan**

- Changes in important **staff positions**

- Problems with any of your **partners or contractors**

- Significant changes to your **budget**

- Other **challenges or questions**
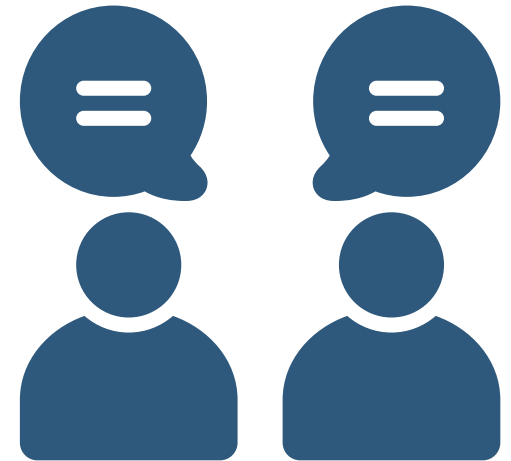
Keep in Mind

Program Officers…

- Have many responsibilities

- Often oversee many different projects

- Are bound by regulations that govern their programs

- May not have specific expertise in the area that your project is focusing on

- Are eager to be helpful

General Tips

- Establish a **regular meeting schedule** to periodically update your program officer about the progress of your project—ask your program officer what works for him/her

- Be **proactive** in communication—reach out in-between meetings, as needed

- **Know the regulations** that govern your program (check Grant Award Notices or ask your Office of Sponsored Programs) to get answers to your questions before you reach out to your program officer

- Contact your program officer by **email first** and give a brief summary of what you want to discuss rather than making a cold call

Tips for Meetings with Your Program Officer

- **Don't assume** that your program officer remembers many of the details of your project

- Helpful to prepare and share a **1-2 page written update** about the progress of your project and/or issues you want to discuss prior to your meeting

- If you want help with a specific technical question, **email the program officer** about it ahead of time so that she or he can get input from others if need be

- Meetings with program officers typically last **30 minutes**—use time wisely to get key agenda items covered

- Set an **agenda** ahead of time—ask your program officer what he/she would like to talk about but also propose agenda items that you would like to discuss

- Ask your program officer to keep you informed about **updates and changes at ED**

- Involve **other members of your team** (e.g., co-PIs, evaluators) in meetings as appropriate

Other Suggestions

- Keep up with the **larger picture** regarding the EIR program and what is important to program officers (e.g., EIR program priorities)

- Try to meet with program officer **in person**

- Keep program officer informed about **special events** and **dissemination activities** (share publications, let them know about conference presentations and invite them to attend)

- Invite program officer for a **site visit**

- Ask program officer to **connect you with related projects**

Examples of When to Reach Out to Your Program Officer

- **Questions** about submitting the annual report (especially the first time around)

- **Discussion** of annual report after the program officer had a chance to read it

- **Unusual circumstances** that impact project implementation (e.g., COVID-19, government shut down)

- **Staffing changes**

- Changes that need to be made in **project design**

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