

Information Sharing Tips for New Grantees

Tips from Del Siegle, Lynn and Ray Neag Endowed Chair for Talent Development, University of Connecticut, Director, National Center for Research on Gifted Education, Director, Renzulli Center for Creativity, Gifted Education, and Talent Development, University of Connecticut

1. Please provide advice for successful implementation at the onset of award.

- Assuming the project involves research, start preparing the IRB.
- If you have an advisory board, meet with them as soon as possible. Their early insights into the project are extremely helpful and will avoid issues later.
- Begin recruiting research team members.
- Work with your post award team to set up accounts, emails, website, etc.
- Refine your project timeline with due dates and personnel responsible for tasks.
- Begin developing project manuals (e.g., travel manual for site visits)
- Locate, develop, and/or refine research instruments (measures)
- Hold regular meetings with the team, keep minutes, and send after meeting summaries with tasks that individuals agreed to do before the next meeting.
- Start a Word file and begin documenting progress that will be used to complete annual reports.

2. Please provide advice for mitigation strategies in successfully overcoming challenges with successful recruitment and retention of project personnel.

- Allowing for remote work will increase the quality of candidates for positions.
- Recently retired personnel are often willing to assist in recruitment. They are very familiar with qualified personnel and potential project sites.
- Have project sites agree to multi-year participation, to avoid constant recruiting.

3. Please provide one thing you are most proud of in what you have been able to accomplish with your previous or current Javits award.

- Built successful partnerships with key stakeholders at project sites. Having a collaborative relationship onsite is essential when unexpected issues arise.
- Developed materials to work on virtual platforms for professional learning. This allows greater exposure and use of the project materials.

Tips from Elisa Calabrese, Javits Grant Project Director, Florida Atlantic University

1. Please provide advice for successful implementation at the onset of award.

- Remain flexible and focus on desired outcomes

The first order of business as a project director is to facilitate collaboration and build relationships among project personnel, leadership, finance project teams, and the project's identified IRB representative. It is

critical to reacquaint the project team with the internal and central office process controls in establishing consistent protocols for monitoring, tracking, and evaluating performance measures, and executing the budget once the award has been granted.

- Contact (call and email) your funder/program officer(s) and thank them for the opportunity—it is important to build and nurture this collaboration for success. The funder has entrusted you with funding to execute on your proposal. Your program officer is a critical member of the team in providing guidance and support. Remember your program officer wants the implementation to be successful, so establishing an open, honest and transparent dialogue with your program officer is paramount.
- Inform your external partners (if applicable) of notice of the award, as well as those parties who have provided letters of support. Early on, schedule time to discuss the awarded proposal, especially if these groups agreed to provide elements of support—participate on an advisory group, engage in professional learning activities, use of a facility, etc.
- Schedule a meeting with the finance teams to establish a financial plan for opening the grant budget and address all the line items for activities associated with costs and draw-down dates. Ensure a shared understanding of allowable, reasonable, and allocable costs. This will mitigate any issues that might have arisen from the time of framing the budget in the application stage to actually receiving the award, such as staff changes in finance teams, and changes to internal controls/processes that might impact execution and monitoring of budget expenditures.
 - Align internal budget categories to federal categories for consistency and coherence.
 - Establish timeline for monthly financial reports and records for review by project team and leadership.
- Convene an initial meeting of the various teams (or representatives of these teams) as soon as possible after award has been granted, along with identified project leadership to review the proposal—personnel, activities, performance measures, timeline for implementation, budget activities, IRB protocols, and data collection methods. This serves to establish open dialogue, effective communication, and a strong foundation for understanding project goals, objectives, and desired outcomes.
- Identify point persons within finance teams, IT, IRB, internal budget office for technical assistance throughout implementation.
- Establish a schedule for data collection, performance measures, budget, and implementation reporting, and obtain information from your program officer concerning requirements and due dates for reports (APR, any interim budget reports, process for amendments, reporting change in personnel, etc.)
- Engage with the leadership team of school/university and deliberately think through sustainability strategies at the onset, because this type of prioritized planning will ensure continuation of those components that prove valuable.

2. Please provide advice for mitigation strategies in successfully overcoming challenges with successful recruitment and retention of project personnel.

Project personnel are the most critical asset to the project. Understanding your current realities and anticipating future challenges will help mitigate immediate issues associated with recruiting, developing, and retaining talented project personnel.

Recruiting Personnel/Team

- Remember that the whole is greater than the sum of its parts. When recruiting and selecting project personnel, it is the role of the project director to build an engaged synergistic team—encouraging team cohesion, authentic engagement, and high performance.
- Clearly defined job descriptions for project personnel should be written and approved through appropriate channels before the proposal is submitted. This will alleviate process delays in advertising a position and engaging in the selection process.
- Understand and communicate the values and benefits associated with the position and of being a member of the organization. This includes highlighting opportunities that are appealing to prospective employees (such as free or reduced college tuition, investment matching options, career advancement options, affordable employee childcare). These values can be tailored to recruiting within the organization and externally by presenting a customized value proposition communication recruitment strategy. Recognize that retention starts with effective recruiting.

Developing Personnel/Team

It takes time to build trust and true collaboration once the team has been formed. It is important for the project director to lead by example (for example, never ask a team member to do something that you would not do yourself).

- Ensure a robust onboarding process for new hires that center around the grant objectives and desired outcomes to build engagement. Differentiate those new to the organization from internal hires.
- Intentionally establish a communication plan among the team to encourage positive group dynamics in creating a productive team culture.
- Effective communication and assigning roles ensure alignment of the goals/objectives and vision for desired outcomes. Be mindful of RACI—team members who are Responsible, Accountable, Consulted, and Informed.
- Invite co-creation by the team in building program/project components whereby constructive honest communication is encouraged, embraced, and valued.
- Present findings of the project as a team while implementation progresses. This communication ensures that everyone understands how the team has leveraged each member's strengths and perspectives to produce positive results/outcomes (it takes a village).
- Celebrate accomplishments as a team and address challenges with proposed solutions as a team. This strengthens aspirations to achieve desired outcomes. It's critically important for the project director to authentically show appreciation to each member of the team and to the team as a whole.

Retaining Personnel/Team (REALLY BEING PREPARED FOR TURNOVER)

It's inevitable that team members will leave. This just happens. It does not mean that these members are not loyal or committed to the work, or that the organization somehow has not met their needs. Things happen—FMLA, spouse finds employment in another state, opportunity to stay at home and raise children, and so forth. Whatever the reason, it is important to be prepared for personnel turnover. Here are some recommendations to better prepare for turnover:

- Ensure key project roles are led by experienced, seasoned, and knowledgeable employees/team members.
- Educate all team members on key components, goals, and objectives of the project to ensure progress of implementation is not negatively impacted if a team member leaves.
- Ensure each team member understands the organizational structure of the project, the environment in which activities are implemented, data collection methods, and each individual team member's assigned tasks. (This is where the RACI chart helps ensure alignment and shows how other team members can pitch in to compensate for turnover.)
- Engage in ongoing structured meetings with the team whereby each team member shares verbally and in writing the progress, challenges, and results of their areas of responsibility for project activities/elements. It is critical to know each other's work and responsibilities.

In the event of turnover, ensure computer files, written reports, and all other pertinent information/records pertaining to the implementation of the project are provided to the project director. Organizing this documentation will assist in preparing a current team member who will immediately take over specific tasks until a new hire is secured for the position.

3. Please provide one thing you are most proud of in what you have been able to accomplish with your previous or current Javits award.

Sustainability of project components through community advocacy and by shifting financial support from the grant to securing diversified new funding streams.

By critically evaluating effectiveness of project/program components, demands for services associated with these components, and realistic costs to support these services, a shared understanding of sustainability with school and university leadership has been realized. The following factors have been concretely addressed to sustain project components: human resources (leadership capacity, talent development, effective teams), organizational setting (alignment to mission, agility to address change processes and management), and social and political environment (internal and external influences lending support for program components).

- Continuation of the project's goals by building a network of community practitioners who collaborate to ensure that project components are efficiently integrated, maintained, and enhanced for organizational value.