

1. What tools have you found useful to manage grants?
 - a. Track activities
 - i. Action items
 - ii. Tasks
 - iii. Projects
 - iv. Deadlines
 - v. Timeline
 - b. Schedule events
 - i. Calls
 - ii. Meetings
 - iii. Workshops
 - iv. Calendars
 - c. Share files, materials, reports
 - d. Create aliases for management and team communication
 - e. Manage grant schedule
 - i. Deliverables
 - ii. Achievements
 - iii. Deadlines - annual reports
 - f. Manage metrics
 - g. Manage budgets
 - h. Manage diagrams
 - i. Fiber
 - ii. Maps
 - iii. Designs
2. What processes have you found useful to manage grants?
 - a. Regular calls
 - b. Face to face meetings
 - c. Defining roles/responsibilities
 - d. Share file space management
3. What specific challenges have you encountered in managing your grant
 - a. Finding time for all team members to meet regularly
 - b. Meeting deadlines
 - c. Organizational processes - one or more organizations
 - d. NSF Fastlane system
 - e. Ensuring participation from all participants
 - i. Lead vs. small organizations

Top 3 takeaways: Grand challenge, a common thread and/or an agreed-upon strategy or solution

1. Annual Report
 - a. Read the outline of the annual report and proposal deliverables prior to starting the project to guide activities that will be reported out annually - makes writing the report easier to gather information throughout the year
 - b. Examples of successful annual reports would be helpful
 - c. Some stronger guidance for first-time report authors
 - d. The audience is the NSF Program Officer and others in NSF
2. Define metrics before the project the project starts
 - a. Baseline your metrics (from your proposal) early to better provide measurable metrics - you can't (or at least can't do this well) in retrospect
3. Define tools early in the project - Project Management, communication, reporting
 - a. Consider and use a common communication/Project Management (PM) tool (s) or platform - it is difficult to get and keep people communicating regularly; make it as easy as you can, e.g. Google, Team Dynamics

Session#1 : Matt Ketterling, Vitaly Ford, Michael Robinson, Semir, Joey Bren, Pankaj, Timothy, Mehmet, Richard Reif, Ralph

Group notes using existing PM tools, like TeamDynamics. Leverage a platform that is common or in use already.

What should I be doing now? Collect areas for your annual report - especially any PR or articles - look at the specific report format and start early. Map your deliverables to your report
Ensure you have a reminder of your annual report on your calendar

Think about a measurable example of work facilitated by your project - collect [network] metrics before and after to help demonstrate progress.

Examples of successful annual reports? ... NSF will respond with acceptance and/or guidance - FastLane will indicate acceptance.

Start and maintain a website...

The learning experience of audit for 503(c) RONS... this came up a few times

Round #2: Timothy, Sagar, Alisha, Jeff, Will Bear.

"Clearly define where you are today so you are prepared to provide metrics tomorrow"

TeamDynamics - waterfall platform

Schedule regular calls to ensure consistent engagement - getting people together to complete their piece

What is a good report - what is a “no-no”

Start with a narrative then detail out the deliverables, articles, WWW...

No formal rules of page count, format or other....

Change of focus - formally write to NSF requesting authorization of reprogramming funds based on detailed design

No-cost extension - don't force to spend- spend right.

Round#3 John Goodhue,

Challenge to qualify 503(c) RON through the audit

Systematic and diligent about accounting and accounting logic

If you choose a different router then explain why - “I spoke to JZ and...” Have the same passion in the report as you do in the initial proposal. Include the issues, not just sugar

WINS should attend TAPIA and/or HOPPER - suggested as report out