

CONDUCTING SITE VISITS/PROGRESS REVIEW



Goal: Ensure that funded research is conducted with excellence, integrity, and accountability, and that different stakeholders are kept apprised of the impact of their support.

CONDUCTING SITE VISITS/PROGRESS REVIEW



FORMATS of PROGRESS REVIEW

Single Team



Funded Team



Review Committee



Funders

Multiple Team



Funded Team 1



Review Committee 1



Funders

-Break-



Funded Team 2



Review Committee 2



Funders

PLANNING PROGRESS REVIEW

PREPARING THE AGENDA

- *Consider time zones of participants.*
- *Consider duration*

PREPARING PARTICIPANTS

- *Consider asking for participant lists.*
- *Use the same zoom meeting link for same-day events.*
- *Request participants to plan to log-in 15 minutes before meeting.*
- *Provide zoom meeting link in multiple ways.*
- *Offer technical support.*

PREPARING INTERNAL TEAM AND TOOLS

- *Team*

Admin 1: Host

Admin 2: Co-host

Scientist 1: Helping conduct progress review

Scientist 2: Helping ensure progress review quality by making sure that only needed participants are present

PREPARING INTERNAL TEAM AND TOOLS

- *Tool: Zoom platform setup*

Lobby – anyone who received the zoom link

Breakout room 1 – vetted participants

Breakout room 2 – closed discussion room

Breakout room 3 – vetted participants who need assistance

Breakout room 4 – unidentified attendees

Additional setting: automatically move participants into breakout rooms
without requiring them to click on a “join” button

PLANNING PROGRESS REVIEW

PREPARING INTERNAL TEAM AND TOOLS

- *Tool* : Zoom meeting tracking grid

Time of Review	Session Type	Name	Role	Email Address	Phone	Assistant Email	Phone
REVIEW MEETING: BREAKOUT ROOM 1: (REVIEWERS, FUNDERS, AND TEAM MEMBERS)							
2:45 - 3:20 p.m.	Open Session	R1	Reviewer				
2:45 - 3:20 p.m.	Open Session	R2	Reviewer				
2:45 - 3:20 p.m.	Open Session	F1	Funder				
2:45 - 3:20 p.m.	Open Session	F2	Funder				
2:45 - 3:20 p.m.	Open Session	S1	Staff				
2:45 - 3:20 p.m.	Open Session	S2	Staff				
2:45 - 3:20 p.m.	Open Session	T1	Team Leader				
2:45 - 3:20 p.m.	Open Session	T2	Team Co-leader				
2:45 - 3:20 p.m.	Open Session	T3	Team Member				
2:45 - 3:20 p.m.	Open Session	T4	Team Member				
Review Room: BREAKOUT ROOM 2							
3:20 - 3:45 p.m.	Closed Session	R1	Reviewer				
3:20 - 3:45 p.m.	Closed Session	R2	Reviewer				
3:20 - 3:45 p.m.	Closed Session	F1	Funder				
3:20 - 3:45 p.m.	Closed Session	F2	Funder				
3:20 - 3:45 p.m.	Closed Session	S1	Staff				
3:20 - 3:45 p.m.	Closed Session	S2	Staff				
3:20 - 3:45 p.m.	Closed Session	T1	Team Leader				
3:20 - 3:45 p.m.	Closed Session	T2	Team Co-leader				
OVERFLOW: BREAKOUT ROOM 3							
OVERFLOW: BREAKOUT ROOM 4							
Any additional guests will not be admitted to Closed Reviews							
ZOOM SETTINGS:							
Allow participants to return to the main session at anytime				<input type="checkbox"/>			
Automatically move all assigned participants into breakout rooms				<input type="checkbox"/>			

PLANNING PROGRESS REVIEW

PREPARING INTERNAL TEAM AND TOOLS

- *Tool: Zoom meeting tracking grid*

Time of Review	Session Type		Name	Role	Email Address	Phone	Assistant Email	Phone
REVIEW MEETING: BREAKOUT ROOM 1: (REVIEWERS, FUNDERS, AND TEAM MEMBERS)								
4:00 - 4:35 p.m.	Open Session		R1	Reviewer				
4:00 - 4:35 p.m.	Open Session		R2	Reviewer				
4:00 - 4:35 p.m.	Open Session		F1	Funder				
4:00 - 4:35 p.m.	Open Session		F2	Funder				
4:00 - 4:35 p.m.	Open Session		S1	Staff				
4:00 - 4:35 p.m.	Open Session		S2	Staff				
4:00 - 4:35 p.m.	Open Session		T1	Team Leader				
4:00 - 4:35 p.m.	Open Session		T2	Team Co-leader				
4:00 - 4:35 p.m.	Open Session		T3	Team Member				
4:00 - 4:35 p.m.	Open Session		T4	Team Member				
Review Room: BREAKOUT ROOM 2								
4:35 - 5 p.m.	Closed Session		R1	Reviewer				
4:35 - 5 p.m.	Closed Session		R2	Reviewer				
4:35 - 5 p.m.	Closed Session		F1	Funder				
4:35 - 5 p.m.	Closed Session		F2	Funder				
4:35 - 5 p.m.	Closed Session		S1	Staff				
4:35 - 5 p.m.	Closed Session		S2	Staff				
4:35 - 5 p.m.	Closed Session		T1	Team Leader				
4:35 - 5 p.m.	Closed Session		T2	Team Co-leader				
OVERFLOW: BREAKOUT ROOM 3								
OVERFLOW: BREAKOUT ROOM 4								
Any additional guests will not be admitted to Closed Reviews								
ZOOM SETTINGS:								
Allow participants to return to the main session at anytime				<input type="checkbox"/>				
Automatically move all assigned participants into breakout rooms				<input type="checkbox"/>				

PLANNING PROGRESS REVIEW

PREPARING INTERNAL TEAM AND TOOLS

- *Tool: Progress Review Host Slides*

CONDUCTING PROGRESS REVIEW

HOURS BEFORE REVIEW

Consider emailing Reviewers and Team members to provide them zoom link again and providing logistic details.

HALF HOUR BEFORE REVIEW

Consider starting the zoom meeting a half hour before scheduled time.

Share Progress Review Host slides.

As participants join, cross-check with participant list.

** Additional tool: Microsoft Teams*

CONDUCTING PROGRESS REVIEW

TEN TO FIVE MINUTES BEFORE REVIEW

After informing accordingly, move individuals to Review Session Breakout Room (Breakout Room 1).

Reach out to key individuals who have not joined.

DURING PROGRESS REVIEW

Support Review Committee Leader by providing logistic guidance via chat.

Before moving individuals to breakout rooms, inform accordingly.

Be prepared to share slides on behalf of presenters.