



## Tips for Managing NSF-Funded Projects

*The following tips for implementing education research projects were shared with the [New Awardee Orientation webinar](#) participants. Please refer to [NSF's PAPPG](#) for official guidance. Additional resources are available in CADRE's [NSF Proposal Toolkit](#) and [Project Management Toolkit](#).*

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### MANAGING A PROJECT TEAM

1. **Flexibility in Hiring:** Hire project staff, such as post-docs or detail-oriented individuals uninterested in research work, in small increments of time if retention is challenging.
2. **Plan for Limited Resources:** If the budget only allows for one graduate student, select a candidate whose goals align closely with the project needs (e.g., dissertation focus).
3. **Expand Recruitment Efforts:** Be prepared to look outside your department to find the right match, especially if graduate students in your area are also practitioners.
4. **Undergrad-Graduate Mentorship:** Consider hiring undergraduates and having graduate students mentor them to maximize team capacity. Check if this is feasible under NSF funding guidelines.
4. **Balance Research and Management:** Recognize the tension between research and project management; budget for and hire staff to handle administrative tasks where possible.
5. **Delegate Strategically:** Assign graduate or doctoral students administrative tasks like report writing or coordinating deliverables.
6. **Engage Teams Fully:** Delegate leadership responsibilities across team members, ensuring no single individual bears all the weight.
7. **Celebrate Milestones:** Recognize and celebrate achievements within the team to maintain motivation and morale.
8. **Facilitate Team Productivity:** Use technology and human relations strategies to delegate roles effectively, making meetings more efficient and focusing on impactful work.
9. **Foster Open Communication:** Encourage team brainstorming to address challenges. Be honest about what's not working to identify solutions collaboratively.
10. **Enhance Accountability:** Utilize project management platforms (e.g., Asana) to track deliverables, automate tasks, and ensure accountability.
11. **Use Collaborative Tools:** Implement tools like WhatsApp for international collaborations and Google Drive for file sharing and documentation.
12. **Streamline Communication:** Schedule large team meetings monthly and smaller check-ins weekly or biweekly for focused updates.

## **PARTNERSHIPS AND COLLABORATION**

13. **Align with District Priorities:** Schedule meetings and workshops at times that suit district timelines and accountabilities, ensuring minimal disruption to their core responsibilities.
  14. **Understand Motivations:** Identify and leverage motivational factors for district representatives, tailoring your approach to align with their goals and incentives.
  15. **Sustain Engagement:** Assign a dedicated team member to maintain district relationships, keeping communication consistent and focused on mutual goals. Involve district representatives as thought partners during critical phases to ensure their input is valued.
  16. **Use Positive Communication:** Share highlights and successes from your work in check-ins or updates to maintain enthusiasm and keep your project on the district's radar in a positive light.
  17. **Prioritize In-Person Check-Ins:** When possible, schedule in-person meetings, as these are less likely to be canceled or postponed and foster stronger connections compared to online sessions.
  18. **Leverage Advisory Boards:** For projects with significant district involvement, consider including a district leader on the advisory board. Their insights can improve dissemination strategies and strengthen collaboration.
  19. **Collaborate on Reports:** For collaborative grants, co-write annual reports with partners but customize sections to reflect each institution's unique contributions. This ensures unified reporting while highlighting individual achievements.
  20. **Balance Communication:** Find the right balance between regular updates and avoiding overburdening school or district representatives. Keep communications concise and impactful to respect their time.
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## **BUDGETS**

21. **Adjust Timelines:** If your award arrives later than expected, consider shifting the timeline or applying for a no-cost extension to meet project goals. All projects (including partnership development type) may be eligible for a single grantee-approved no-cost extension.
22. **Budget Changes:** Understand NSF preapproval requirements for changes to participant support costs or PI effort; review PAPPG guidelines and Research.gov for compliance.
23. **Understand Reimbursement Rules:** Familiarize yourself with NSF payment processes, including reimbursement and options for advance payments under specific circumstances.
22. **Develop Institutional Relationships:** Build a strong connection with your organization's accounting department for guidance on grant-related processes.
23. **Reserve Time for Management Tasks:** Plan to spend time regularly tracking and updating your budget and completing time-intensive tasks like subaward or vendor agreements.



24. **Prepare for the Unexpected:** Anticipate flexibility for unexpected changes that effect your budget, such as personnel transitions, institutional policy updates, or changes to indirect costs.
  25. **Adapt Stipend Payments:** Tailor the timing of participant stipends (e.g., pre-, during, or post-engagement) based on your project design and goals.
  26. **Optimize Budgets Across Partners:** Explore ways to share costs, such as combining budgets for travel or conference expenses.
  27. **Learn NSF Policies:** Take time to understand NSF policies related to participant costs, purchasing agreements, and budget amendments to stay compliant.
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### **Reporting to NSF**

28. **Communicate with Program Officers (POs):** Regularly update your PO, especially about major changes, and consult them on thorny project issues.
  29. **Be Proactive:** Send quarterly updates to POs to avoid surprises in the annual report and approach conversations with potential solutions to challenges.
  30. **Leverage Tools for Reporting:** Keep detailed notes and use collaborative tools to make annual report preparation efficient.
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By integrating these strategies, you can streamline project management, strengthen partnerships, and effectively navigate the challenges of NSF-funded projects.