

Select and Orient CCI Sites: A Checklist

The following tasks are in rough chronological order, but the order may vary depending on your project.

To **select** sites for your CCI project:

- _____ **Set a reasonable deadline for responding to the solicitation.** Allow sufficient time for applicants to respond — especially if the requirements are complex. 60 to 75 days is the minimum; 90 to 120 days is ideal.
- _____ **Disseminate information and answer questions about the solicitation.** Establish a process to ensure that all applicants are given the same information. Use pre-submission conference calls, meetings, or FAQs posted on the web where all potential applicants can view them. (For an example, see "Available Technical Assistance" on page 9 of the SS/HS solicitation).
- _____ **Set the selection criteria.** Make certain you base selection criteria on the desired characteristics and capabilities of applicants as stated in the solicitation.
- _____ **Establish a screening process.** Here are two possibilities.

<i>When you have a large pool of applicants, consider a multi-stage screening process.</i>	<i>When you want to target sites that are less ready, or when site readiness is a general concern, consider planning grants.</i>
<ul style="list-style-type: none"> _____ do an initial screen for compliance with minimum requirements, followed by... _____ a deeper screening using the program criteria outlined in the solicitation, culminating in... _____ site visits to the final cohort of eligible applicants. 	<ul style="list-style-type: none"> _____ do an initial screening to identify likely candidates. _____ award these candidates small planning grants to develop full, comprehensive submissions that you will evaluate for further funding.

- _____ **Provide an orientation for peer reviewers.** Make sure that peer reviewers get a complete overview of the initiative's requirements so they will be better able to assess applications.
- _____ **Establish a fair and equitable scoring system.** During the peer review process, use a scoring system that compensates for differences between "hard" and "lenient" reviewers. Here are two possible strategies for accomplishing this.
 - _____ Use a statistical method to "weight" the scores (Consult a statistician.)

_____ In your rating form, link qualitative statements to numbers (so that, for example, if a reviewer rates an applicant as "fully compliant" with a particular criterion, the applicant automatically receives the highest possible score for that criterion). For an example, see form C in the [peer review forms for Safe Kids Safe Streets](#).

_____ **Before final selection, make site visits to...**

_____ assess how closely actual community collaboration and practice hew to what was described in the application

_____ get a fuller sense of community capacity to carry out the initiative

_____ identify TA needs and other issues to factor into the selection decision.

To **orient** sites:

_____ **Conduct a grantee orientation.** Immediately after selection, convene a meeting of all grantees to...

_____ review program requirements

_____ respond to questions

_____ introduce the grantees to federal staff, TA providers, and evaluators

_____ establish a framework for peer-support networks.

_____ **Arrange follow-up site visits** by the program /TA /evaluation team.

_____ **Develop a standard packet of orientation materials** that can be given to new staff hired by grantees. Update the packet as needed.

_____ **Hold intermittent meetings and trainings** as needed, but more often in the first year. These might be for all the sites, for all initiative participants including TA providers and evaluators, or for sub-groups of sites and participants based on geographic region, job role, or another characteristic

_____ **Set up frequent and regular conference calls.** Use these calls to discuss specific topics, or simply to provide a forum for sites to ask questions and share their strategies and challenges.

_____ **Create a shared web space** open to all initiative participants where they can post announcements, requirements, successes, strategies, requests for assistance, ideas, etc.

_____ **Emphasize the developmental nature of CCI work** throughout the entire orientation process. Assure sites that you expect "mistakes," and encourage them to use what they learn from their mistakes to retool their strategies and approaches.

For more information about orienting sites to funding requirements, see Funding Guideline 4, How should I communicate my expectations to sites?