Smartsheet Gov for Grant Management: User Guide for EED Program Officers and Grantee Staff



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Overview

Beginning with the FY 2023 cohort, EED grantees and program officers (POs) will be able to access logic models, project plans, and grantee dashboards in Smartsheet Gov.

How to use this guidance

The guidance includes the following sections, which can be accessed directly by double-clicking on the title for each section:

- Initial Login and General Tips for Using Smartsheet Gov: A description of initial sign-in procedures and an orientation to the Smartsheet workspace.
- Logic Model: A description of how to access the logic model and key features.
- **Project Plan:** A description of how to access, update, and share the project plan.
- **Project Dashboard:** A description of the basic layout of the dashboard, including screenshots to help with navigation.
- Using Smartsheet Gov as a Grantee: An explanation for how to use the tool, including detailed instructions and screenshots for logic model review and project plan tracking and maintenance.
- Using Smartsheet Gov as a Program Officer: An explanation for how to use the tool including detailed instructions and screenshots.



Initial Login and General Tips for Using Smartsheet Gov

Logging in for the first time

Each grant's project director will receive an email invitation to join a Smartsheet Gov account.

- 1. Search for an email invitation from this email address: <u>user@smartsheetgov.com</u>.
- 2. Select **Open in Smartsheet** in the email to proceed. After doing this, you'll be directed to the Smartsheet login page to set your password.
- 3. Since Smartsheet Gov already knows your email address, you simply need to create a password for your account. Enter a password, agree to the Smartsheet User Agreement, and click **Continue.**

🖌 smart:	sheet
One thing firs	t
Let's secure your accour	t with a password
Your password must have at least security, use a mix of letters, numb Don't reuse a password from anoth	10 characters. For better sers, and special characters ser site.
Password	
	٥
Strong	_
Confirm Password	
••••••	ø
Great! These passwords match.	
I agree to the Smartsheet Us acknowledge that Smartsheet data in compliance with the f	er Agreement and et will process my personal Privacy Policy.
	Continue

Figure 1: Creating an account password in Smartsheet

At initial login, you will be presented with a Smartsheet welcome video with user tips and a short overview of the built-in features.

Watch the quick intro video to learn about your free user account. Your EED Workspace primarily uses the Sheets and Reports features.



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Home	Welcome to Smartsheet! The easy to work with others. Bee aded you and your house can do.	County In C I
	B smartsheet How To Get Started As A Free User	Augu Aka-caana Autor Maria Ma
	G Laws May	S. Salashhavaling@prat.com

Figure 2: Screenshot of introductory video

Navigating Smartsheet Gov after signing in

Once logged in, you will first be brought to the home screen. Here you will have access to your shared Workspace(s). If you have multiple grants, each grant will have its own workspace. Within this space, your access to view or edit individual sheets will vary based on the permissions granted to you. You have Viewer permissions for both the logic model and dashboard. You will have Editor access for the project plan so that you can make regular updates to your project plan.

Home	🗀 AHC-A - KEDC - 2023
▼ □ Sheets	Actions •
 ✓ ²♥ Workspaces ▶ ²♥ AFM 	Name Sharing
► ੴ AEM - EED Projects	📄 🖈 🛅 Project Dashboard Files Workspace
▶ 원 AEM Training	□ ☆ (♥ 01_Project Dashboard Workspace
▼ ? AHC-A - KEDC - 2023	¹ / ₂ → 02_Logic Model Workspace
✓ AHC-A - KEDC - 2023	U3_Project Plan Workspace
 Project Dashboard Files 	

Figure 3: Example of the workspace

Click on your Grantee Workspace folder to access the following:

- Project Dashboard Files
 - o Project Setup
 - Current Quarter
 - Task Status Report
 - 01 Project Dashboard
- 02_Logic Model
- 03_Project Plan



Returning to Smartsheet Gov

The EED TA Center uses Smartsheet Gov. When you would like to sign into Smartsheet Gov, please make sure you use the following URL: <u>https://app.smartsheetgov.com/b/home</u>. We recommend bookmarking this URL.

Logic Model

Logic models provide a high-level description of the project strategies and associated activities, resources, and the outputs and outcomes of the project.

Viewing the logic model

After clicking into the grantee workspace folder, click **02_Logic Model** to open the logic model. The EED TA Center uploaded your logic model to this format. You can reference, print, and comment on the logic model at any time.

The logic model sheet is set to view-only mode. If there are extenuating circumstances where a change needs to be made, please contact <u>eed-ta@aemcorp.com</u>.



Figure 4: Example of the logic model

Project Plan

Project plans provide an effective tool for grantees to quickly track and report on the status of an individual strategy or activity. The project plan sheet is the initial draft project plan submitted by the grantee. At a minimum, grantees must update project plans quarterly, at least two weeks prior to scheduled monitoring calls with POs, but grantees can choose to update project plans as often as needed to keep track of project tasks.

Viewing the project plan

After clicking into the grantee workspace folder, click **03_Project Plan** to open the sheet.



File	Automation	Forms Co	onnections	🍃 03_Project Plan 🕁				୍	Sh	are
8 8	5 ¢	Grid V	iew 🔹 🏹 F	ilter 🔄 🚍 🛛 Arial 🕶 🔤 10 💌 🖪 📕 🖳 🖳 😌	<u>~</u> <u>A</u> •	≡ •	≣ & 7	2		^
	0 – i	Milestone	Number	Strategy, Activity, or Task	Status	Start Date	End Date	Ongoing	A	\Box
1		*	1	Kentucky Educational Development Corporation	4	10/01/23	09/30/28			D
2		*	1	Provide innovative professional learning opportunities through Presidential Academies for EPIC teacher leaders of AHC	In Progress	11/20/23	09/30/24			=
3		*	1.1	 Conduct Presidential Academies during the school year where innovative professional learning (focused on AHC content, technology, and SEL) is offered to participating EPIC teacher leaders 	In Progress	11/20/23	05/31/24		•	ධ ල
4			1.1.1	 Determine Year 1 focus and sequence professional learning opportunities based on program & project goals and objectives & based on needs assessment data from teacher leaders. 	In Progress	11/20/23	07/31/24			€. ₽
5			1.1.1.1	Identify, contact, and secure professional learning cadres session presenters across AHC content, SEL, & technology	In Progress	11/20/23	09/30/24			~~
6			1.1.1.2	Establish Year 1 contracts with professional learning cadre session presenters	In Progress	11/20/23	09/30/24			0
7			1.1.2	Generate Year 1 calendar for first quarter	Complete	11/20/23	11/29/23			
8			1.1.3	Establish/refine professional learning cadre session registration process	Complete	11/20/23	11/20/23			
9			1.1.4	 Promote professional learning cadre sessions throughout year 	In Progress	11/20/23	09/30/24	•		

Figure 5: Example of the project plan in grid view

Project Plan Views

The project plan sheet can be viewed in different ways:

1. On the toolbar, select the **View list**.



Figure 6: View menu with options

- 2. Select Grid, Gantt, Card, or Calendar Views
- Grid View The default view; data is presented in a spreadsheet format, as shown in Figure 5.
- Gantt View Presents the data in a Gantt Chart; on the right side of the page, data is presented as a bar chart that illustrates a project schedule.

e o c	로 Gantt	View * V	Filter 🚊 🚉 Arial • 10 •	в	1	<u>U</u>	5	00	ľ	<u>A</u>	•		Q		Ъ	Base	elines
0 = =	Milestone	Number	Strategy, Activity, or Task	No	w 19 M	тw	ΤF	s	Nov S I	26 И Т	w	ΤF	S S	Dec 3	тv	/ т	FS
1	*		Kentucky Educational Development Corporation										_				_
2	*	1	Provide innovative professional learning opportunities Academies for EPIC teacher leaders of AHC														
3	*	1.1	 Conduct Presidential Academies during the school professional learning (focused on AHC content, tec offered to participating EPIC teacher leaders 		-												
4		1.1.1	 Determine Year 1 focus and sequence professio opportunities based on program & project goals on needs assessment data from teacher leaders 														
5		1.1.1.1	Identify, contact, and secure professional lean presenters across AHC content, SEL, & techn														
6		1.1.1.2	Establish Year 1 contracts with professional le presenters														

Figure 7: Example of Gantt view



Card View – Displays summary information for each line within the sheet as a series of 'cards' within columns. Clicking the card displays a dialog box with all the fields related to that item.



Figure 8: Example card view

• Calendar View – Presents the data in a calendar (where appropriate).



Figure 9: Example calendar view

Revising the project plan structure

Project directors and other grant staff have permission to edit and revise the project plan.

The project plan sheet consists of columns and rows. Columns in your project plan are named as follows: Milestone, Number, Strategy, Status, Start Date, End Date, Ongoing, Assignee, and Notes.

- Milestone: Can be used to indicate that a particular task is a key achievement
- Number: A reference number for the task
- Strategy, Activity, or Task: The name or description of the task
- o Status: Indicates the current progress of the task
- o Start Date: The date when the task was or is to be started
- End Date: The date by which the task is expected to be completed



- Ongoing: A checkbox to indicate if a task is an ongoing task with no end date
- Assignee: The person or team responsible for the task
- Notes: Additional details about a task

Because the dashboard uses data from the project plan, it is important to keep all column headers the same. **Do not rename columns**.

Milestone	Nu	Strategy, Activity, or Task	Status	Start Date	End Date	Ongoing	Assignee	Notes
*		Grantee Name>>		10/01/23	09/30/26			
*	1	 Implement an evaluation process for teachers and school leaders. 	In Progress	10/01/23	09/30/26		NIET Project Director, District Leaders, School Leaders	The NIET Princi leader evaluatio Standards Rubr instrument.
9	1.1	 Train and certify evaluators on the evaluation process. 	In Progress	10/01/23	09/30/26		NIET Project Director and Senior Specialists	NIET will train d of school leader leaders to be ce
Ŷ	1.1.1	Deliver CORE training on teacher evaluation to district leaders, school leaders, and teacher leaders.	Complete	angoing	09/30/26		NIET Project Director and Senior Specialists	CORE training of Rubric in all dist

Figure 10: Project plan columns

Indenting and Outdenting Rows

Project directors and staff can establish relationships or hierarchies in the project plan by highlighting the rows that you want and using the indent or outdent buttons on the toolbar. Use the indention tool to match the number hierarchy. Subtasks should be indented under the parent task.

	Q Search	
File Automation Forms Connections		옷 Share
$\square \ \square \ \bigcirc \ $	a 2	••• ^
Figure 11: Indent button		

- 1. Click on a cell in the first row you'd like to indent.
- 2. Click the **Indent button** on the toolbar. The row above it will become the parent row.

File Automation	Forms Co	nnections	☐ O3_Project Plan ☆	
B & ℃ <	Grid Vi	ew 🔻 🌄 Fi	lter (☲ ⇒) Arial • 10 • B I ⊻ 용 �	<u>· A</u> ·
0 p i i	Milestone	Number	Strategy, Activity, or Task	Status
1	*		Kentucky Educational Development Corporation	
2	*	1	Provide innovative professional learning opportunities through Presidential Academies for EPIC teacher leaders of AHC	In Progress
3	*	1.1	 Conduct Presidential Academies during the school year where innovative professional learning (focused on AHC content, technology, and SEL) is offered to participating EPIC teacher leaders 	In Progress
4	Ŕ	1.1.1	 Determine Year 1 focus and sequence professional learning opportunities based on program & project goals and objectives & based on needs assessment data from teacher leaders. 	In Progress
5		1.1.1.1	Identify, contact, and secure professional learning cadres session presenters across AHC content, SEL, & technology	In Progress
6	☆	1.1.1.2	Establish Year 1 contracts with professional learning cadre session presenters	In Progress

Figure 12: Example indent

Inserting a row

You can add new rows to your project plan as needed.



- 1. Right click on any highlighted row number.
- 2. Select Insert Above or Insert Below.

Automation	Forms Co	nnection	8	📮 Project	7	Insert Above	InsertNey
5 C	🗐 Grid Vi	ew •	Filter		*	Insert Below	Ctrl + X
	Milestone	Health	Nu	Strategy, Activity, or Task	D	Copy	Ctrl + C
0 = m i		fn -				Paste	Ctrl + V
	*	•		Missouri Department of Education			
					0	Edit	
					۲	Delete	
	*	•	1	 Implement an evaluation process for teachers and school 	†.	Sort Rows	
					Ô	Lock	
						Move to Another :	Sheet

Figure 13: Example insert row

Indicating a task is ongoing

For actively ongoing tasks, ensure that the End Date fields are left empty and mark the checkbox to indicate they are ongoing.

Nu	Strategy, Activity, or Task	Status	Start Date	End Date	Ongoing	Assignee
132	Input student achievement data into EE PASS	Not Started	ongoing	ongoing		NIET Technology Team
1.3.3	Analyze observation data to assess trends, areas of growth, and areas in need of support.	In Progress	10/01/23	09/30/26	(0	School Leaders
1.3.4	Analyze evaluation data to make HCMS decisions.	In Progress	10/01/23	09/30/26	0	District Leaders

Figure 14: Ongoing check box

Highlighting changes

Project directors and staff can view any recent changes since the last time the project plan was viewed by using the Highlight Changes feature.

1. Select the **three dots** at the end of toolbar.





2. Select the **Highlight Changes** button on the toolbar. Move the slider to **ON**.



Highlight Changes	?	×
ON		
Highlight changes in the last:		
Hour -		
since 02/13/24 2:04 PM		
Background color for changed cells:		

Figure 16: Highlight changes feature

- 3. Under Highlight changes in the last, select a time interval.
- 4. When you enable the I last viewed the sheet option, you'll see highlighted changes since you Last viewed the sheet—anyone else who views the sheet will see changes since they last viewed the sheet.
- 5. Select **Background color** to set the highlight color.
- 6. Select the **X** in the upper-right corner of the window to close it and save your settings.

Sharing the project plan

Project directors can share the project plan with both internal and external team members for collaboration.

1. In the upper-right area of the screen, select **Share**.



Figure 17: Share button

- 2. In the **Invite Collaborators** field, type the user's or group's email address.
- 3. Select the permission level for each of your collaborators. Only project directors should have the Editor can share permission. All other grant team members should have Editor cannot share, Commenter, or Viewer permissions.



	Permi	ssions (i)
Add people and workgroups	2 Edito	or - can share
Invite Details 🕨		
Collaborators (12)	This sheet is in a workspace	: AHC-A - KEDC
Julia Redmon (julia.redmon@aemcorp.com)	Owner	297
Angie Abu-Alam (angie.abu-alam@aemcorp.com)	Admin	223
Antoinette Magee (antoinette.magee@aemcorp.com)) Admin	<i>1</i> /25

Figure 18: Sheet sharing dialog

Adjusting notifications

The project plan includes default automation to notify assignees when the end date is two weeks out and status is Not Started or In Progress. Assignees will receive notifications via Smartsheet Gov from the email address automation@smartsheetgov.com with the subject line Upcoming Tasks Due.

Upcoming Tasks Due									
(i) If there are problems with how this message is displayed, click here to view it in a web browser.									
You don't often get email from automati	You don't often get email from automation@smartsheetgov.com. Learn why this is important								
EED									
test03 Project Plan									
Message. Thease, see belo	W TOT LUSK	s due in a							
Strategy, Activity, or Task	Status	Start Date	End Date	Notes					
Deliver CORE training on teacher evaluation to district leaders, school leaders, and teacher leaders.									
Deliver Principal Standards 5 Rubric Training to school leaders and their supervisors.	In Progress	10/01/23	03/09/24	Deliver training on the Principal Standards Rubric delivered to school leaders and their supervisors.					

Figure 19: Upcoming Tasks Due email from Smartsheet

Grantees can customize notifications if needed. We recommend watching this <u>video</u> to learn more about customizing notifications.

Commenting

Project directors, grant staff, and program officers can collaborate in the left and right panels of the sheet to add comments. Comments are available to anyone with access to the project plan. Comments can be an effective way to communicate about a specific part of the project plan or logic



model. All comments are time-stamped to easily track when a comment is made. Everyone shared to the sheet has access to the added information and can reply.

Adding comments to the project plan:

- 1. Select the row where you want to leave a comment.
- 2. Click Add a comment.



- 1. In the comment box, type your comment.
- 2. The Conversations panel will pop up. Type your post. You can tag someone in the comment by typing @<user's email address>. The user will receive a notification in Smartsheet Gov and via email.
- 3. Select the arrow in the bottom-right of Conversations panel to **Post comment**.

Co	nvers	ations
Row	Sheet	All
Row 2	2: Implem	ent an evaluation process for teachers
Cor	versat	ions in the context of your work
G	et starte	d by entering the first comment below.
	Row 2: Im	plement an evaluation process for teachers a
AA		
AA	Commen	t or notify others with @

Figure 21: Conversations panel

Editing or deleting comments

- 1. Hover over a comment and select the **three dots**.
- 2. Select Edit comment or Delete comment from the list.



Co	nversations	5		
Row	Sheet All			
Row	1: < <grantee name:<="" th=""><th>>></th><th></th><th></th></grantee>	>>		
•	Angie Abu-Alam Please review all (1 minute ago Reply	 ✓ Ø Ø 	Edit comment Email comment Print comment Delete comment	

Figure 22: Comment menu with options

Reviewing all comments

Access all sheet and report comments by opening the **Conversations panel towards the top-right portion of the screen.**

<u>୧</u> ୯	Share
	^
going	
	0
	ā

Figure 23: Accessing the conversations panel

Attaching a file in Smartsheet

Users can attach files to their project plan. Use of this functionality is not required, but grantees might find it helpful to upload documents. Users attaching only a few files and/or files that do not fit neatly within a row may want to follow the directions below. Users uploading multiple files or files associated with action items should refer to the directions on how to attach a file to a specific row.

- 1. Select the **Attachments** icon *O* on the right panel.
- 2. Select the **Sheet** tab.
- 3. Drag any files to the **Attachments** pane or select the **Attach Files to Sheet** button.





Attaching a file to a specific row in Smartsheet

Users can also opt to attach files to specific rows in Smartsheet. This functionality is helpful if you have multiple attachments or want to associate a file with a specific task.

- 1. Select the row where you want to leave a comment.
- 2. Click Attach a file to this row.



4. The Attachments panel will pop up.

- 5. Drag any files to the **Attachments** pane or select the **Attach Files to Row (#)** button.
- 6. You can view files after they have been posted by clicking the paper clip button again or by accessing the Attachments panel.



Tips for Using the Project Plan

The project plan is meant to be a living document. Here are some best practices for consideration:

- Ensure all assignees have access to the project plan so they can monitor their own assigned tasks.
- ✓ Use the project plan in check-in meetings to review the status of upcoming and overdue tasks.
- ✓ Update the project plan regularly:
 - Update the status when you begin or finish a task.
 - Keep assignees up to date as responsibilities change or staff transition occurs.
 - Add additional rows as needed to capture the key tasks of an activity or strategy.
 - Adjust start and end dates as needed to ensure the project plan is realistic and aligned to key strategies of the grant.

Project Dashboard

The project dashboard summarizes and pulls important information from the logic model and the project plan. It shares important aspects, such as project plan status and other project plan key performance indicators, in a single place. The project dashboard dynamically reflects changes made to the logic model and project plan.

Dashboard layout

The main view has three key sections.

- 1. At a Glance
- 2. Project Plan Snapshot
- 3. Logic Model Snapshot

At a glance

The at-a-glance section of the dashboard includes key information about the grant, including:

- Award number
- Award year
- Project start date
- Project end date
- Project duration progress Shows the percentage of time remaining based on the start and end dates of the grant, providing a quick view of the project's timeline status
- Project Plan Progress Shows the percentage of the project tasks that are marked complete, and what percentage of tasks are still pending
- Task Status Breakdown Summarizes the status of various tasks within the project
- Project Plan Last Modified Date project plan was last modified
- Project Plan Modified by Displays the email address of who last modified the project plan



- Project Contacts includes the name of the grant Projector Director and the assigned ED Program Officer
- Project Documents Incudes links to the full logic model and project plan

< <grantee name="">></grantee>		Award N	lumber	Project Start	Project Duration Progress	
		< <av Numb</av 	vard er>>	10/01/23		
		Award	l Year	Project End	88%	
< <type>> Dashboard</type>		< <award< td=""><td> Year>></td><td>09/30/26</td><td>Days In Days Remaining</td></award<>	Year>>	09/30/26	Days In Days Remaining	
Project Contacts	12	atest Project Pl	an Status	s and Updates	5	
< <project director="">> Project Director</project>	Project Plan Progress	Task St	atus Break	down	Project Plan Last Modified	
< <program officer="">></program>	s	Status	Value	%	02/08/24	
Program Officer		Not Started	21	30%	02/00/24	
		In Progress	43	62%	Project Plan Modified by	
Project Documents	97%	Ongoing	4	6%		
		Complete	2	3%	Cell-link@smartsneet.com	
نتي 03_Project Plan م 02_Logic Model	3% % Complete % Remaining				aem®	

Figure 26: Dashboard example

Project plan snapshot

The project plan snapshot includes project plan tasks that are ongoing, starting in the next 90 days, or ending in the next 90 days.

	Project Plan Snapshot (180 Days Rolling & Ongoing)						
Number	Strategy, Activity, or Task	Status	Start Date	End Date	Assignee	Notes	
1.1.2	Generate Year 1 calendar for first quarter	Complete	11/20/23	11/29/23	Project Coordinator & grant staff		
1.1.7.1	Recruit Year 1 participating teacher leaders	In Progress	11/20/23	12/31/23	Project Coordinator		
1.1.7.2	Review Year 1 applications select teacher leaders for project participation and notify participants	In Progress	11/20/23	12/31/23	Project Coordinator		
1.1.9	Establish Year 1 contracts with EPIC teacher leaders	In Progress	11/20/23	12/31/23	Project Coordinator & grant staff		
1.2.2	Assign roles at first summer conference planning meeting	In Progress	11/20/23	12/31/23	Project Director		
1.2.4	Develop summer conference agenda	In Progress	11/20/23	03/31/24	Project Coordinator		

Figure 27: Project Plan Dashboard Example



Logic model snapshot

The logic model snapshot displays the information from the logic model sheet. This section might not have all the details of your complete logic model. This snapshot serves as a quick reference of the logic model.

Logic Model Snapshot								
Resources	Strategies & Activities	Outputs	Short-Term Outcomes	Long-Term Outcomes				
NIET Principal Standards Rubric NIET Teaching and Learning Standards Rubric NIET-developed EE PASS Human Capital Data Management System NIET CORE training on the TAP System Resources through the EE PASS Portal Expertise of NIET project personnel District and school leadership support, buy-in, and time	Resources Strategies & Activities Outputs Principal Standards Strategy 1: Implement valid and reliable evaluation processes for teachers and school leaders • 100% of principal evaluators are trained and certified to use the NIET Principal Standards Rubric. Teaching and Learning developed EE PASS Capital Data sment System 1.1 Train and certify evaluators on the evaluation process. • 100% of teacher evaluators are trained and certified to use the NIET Teaching and Learning. 1.2 Implement multiple cycles of observation and feedback for teachers and school leaders. • 20% of evaluators report satisfaction with the training on the evaluation process on an online survey. 1.3 Use evaluation data to make informed decisions on human capital management. • 100% of school leaders receive multiple cycles of observation and feedback. tise of NIET project tel • 100% of districts use educator evaluation data to make informed decisions on human capital management. • 100% of districts use ducator		 265% of teachers report that the evaluation process has a positive effect on their teaching on an online survey in Year 2. 265% of school leaders report that the evaluation process has a positive effect on their leadership skills on an online survey in Year 2. 250% of schools show improvement in the percentage of students passing the state assessments from baseline (i.e., prior to the grant) to Year 2. 	 280% of teachers report that the evaluation process has a positive effect on their teaching on an online survey in Year 3. 280% of school leaders report that the evaluation process has a positive effect on their leadership skills on an online survey in Year 3. 270% of schools show improvement in the percentage of students passing the state assessments from baseline (i.e., prior to the grant) to Year 3. 280% of teachers and school leaders are rated as effective or higher on their evaluation system in Year 3 [GPRA a]. 				
Resources	Strategies & Activities	Outputs	Short-Term Outcomes	Long-Term Outcomes				
Evidence-based teacher leader role descriptions, selection processes, and funding Agreed-upon salary augmentation structure for teacher leadership roles	Strategy 2: Establish and expand formal, instructionally focused roles for teacher leaders 2.1 Establish and expand teacher leadership roles and responsibilities.	 100% of districts establish and/or expand teacher leadership roles and responsibilities. 100% of districts have completed the teacher leader hiring process. 	 ≥75% of teacher leaders report their intention to continue working in their districts on an online survey in Year 2. ≥65% of teachers report that support and feedback from teacher leaders have improved their instruction on an online 	 285% of teacher leaders are retained in the district in Year 3. 280% of teachers report that support and feedback from teacher leaders have improved their instruction on an online survey in Year 3. 				

Figure 28: Logic Model Dashboard Example

Using Smartsheet Gov as a Grantee

User access

The EED TA Center provides initial access to project directors. Only project directors have the following permissions:

- Dashboard: Editor can share (All data will be locked)
- Logic model: Editor can share (All columns will be locked)
- Project plan: Editor can share

Project directors can share the dashboard, logic model, and project plan with additional users. Other grantee staff should be given either Editor – cannot share, Commenter, or Viewer permissions.

Sharing the project plan

1. In the upper-right area of the screen, select **Share**.

660			Q. Search
File Automation Forms Connections	💭 03_Project Plan ☆		Rt. Share
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© ⊕ ⊕ (Mileatone Number Strategy, Activity, or Ta	aŭ.	Status	Start Date End Date Orgoing &

Figure 29: Share button



- 2. In the **Invite people and groups** field, type the user's or group's email address.
- 3. Select the **permission level** for each of your collaborators. Only project directors should have Editor can share permissions. All other grant team members should have Editor cannot share, Commenter, or Viewer permissions.

Invite Collaborators	Perm	issions 🕡
Add people and workgroups	Edito	or - can share
Invite Details 🕨		
Collaborators (12)	This sheet is in a workspace	e: AHC-A - KEDC
Julia Redmon (julia.redmon@aemcorp.com)	Owner	,75%
Angie Abu-Alam (angie.abu-alam@aemcorp.co	m) Admin	123
Antoinette Magee (antoinette.magee@aemcor	o.com) Admin	543.
Sheet Link (j		
https://app.smartsheetgov.com/sheets/jMMwpfhWMM	//8HjrqgFgjrcvCHQpC95m9WqWj8	5qw1

Figure 30: Sheet sharing dialog

Removing users

- 1. In the upper-right area of the screen, select **Share**.
- 2. Hover over the row of the user account you want to remove.
- 3. On the right side of the row, Select the **X** to remove sharing.

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Figure 31: Removing users

Successful use

Project directors meet quarterly with their POs to review project plans and logic models. The best way to prepare for these meetings is to keep your project plan up to date regularly. At a minimum,



project directors must update their project plan at least two weeks prior to their scheduled quarterly monitoring calls.

Successful grant implementation requires careful planning and implementation. The project plan helps grantees keep track of progress to date.

Using Smartsheet Gov as a Program Officer

User Access

Program Officers will have access to a workspace for each of their assigned grantees. The workspace uses the following naming convention: GrantProgram - Grantee – YearAwarded.

If you have trouble finding a grantee workspace, please email <u>eed-ta@aemcorp.com</u>.

POs have Commenter rights for each workspace, meaning that they can comment and upload files.

Using grantee workspaces

Each grantee has its own workspace. POs should access these workspaces regularly, but especially in preparation for quarterly monitoring meetings. POs can collaborate with grantees by providing feedback, leaving comments in logic models or project plans, or attaching relevant files either at the Workspace level or directly within the project plan and logic model documents.

Questions and Support

If you have questions about using Smartsheet Gov, please contact <u>eed-ta@aemcorp.com</u>.

