Principles of Strategic Proposal Development

5-part online training series
12 – 1:30 pm MST
1-866-906-7447
Participant code: 3535083

NEDARC
The National EMSC Data Analysis Resource Center
Getting Ready to Write Your Proposal

Part 2: October 3rd, 2017
Session Overview

1. Gathering important info before you start writing
2. Developing
   1. Grants Folder
   2. Task Timeline
   3. Grant Writing team
3. Organizational Tips
Objectives

By the end of this session you will:

• Understand specific tasks that can help prepare you for writing a proposal

• Identify 2 time management tools to utilize when writing a grant
Preparing to Write
Where are we in the grant writing process?

Idea/ project

Proposal

Potential Funder
Develop a Grants Folder
Place to keep program related documents for future funding opportunities
Keep Updated
What types of documents could be in your grant folder?

- Personnel
- Great work
- Program related
- Past grant work
- Performance measure manual
Personnel Related

- Up to date advisory committee info
- Organizational charts
- Bio sketches
  Program
  Advisory Committee
Super Awesome work you are doing

• Letters of Support
• Press Clippings
• Anything that directly relates to the work
Program Related

• Logic models
• Mission statement
• Strategic plans
• Data
• PM manual
Past Grant work

- Old proposals
- Old RFP/FOA
Develop a Grants Folder

Regularly updated resource bank of information on your program, and projects you are involved in

- Bio sketches
- Organizational charts
- Letters of Support
- Press Clippings, programs, that directly relate to work
- Up to date advisory committee document and key bio sketches (chair, FAN, co-chair, etc.)
- Data
- Old proposals
- Old RFP/FOA
- Logic models
- Mission statement
- Strategic plans
Components of Proposal
Proposal

• Abstract
• Project narrative – 3rd session
• Budget/Budget Narrative – 4th session
• Attachments (required docs)
Abstract

Summarizing the proposal

Wait until the end to write the abstract
Attachments
Follow criteria exactly as stated!
Consider page limitation
If you have questions, ask.

Set timeline with leeway (everyone is busy, and thinks they are special).

• Work Plan Timeline
• Staffing Plan and Key Personnel
• Bio Sketches
• Project Organizational Chart
• Letters of Agreement, Contracts, MOU’s
• Letters of Support
Outlines in helpful.

Organize your thoughts
Get all your ideas and background on one document
Identify major activities to write the grant, helps to set deadlines
Break the work down into manageable pieces
It will help with the management of your time.
Developing your timeline
New policy: Students work every weekend to collect preliminary data

Must pad pubs list: Quick! Finish experiments, write papers

Insomnia starts: Awake at 3:30 am

Write “Specific Aims” section

Univ grants office ignores budget

This project sucks!

Re-write “Significance” & “Approach” sections

Fold old Aim 3 into Aim 2; Write new Aim 3

Four emails + 3 phone calls to define ‘modular budget’ to Univ grants office

Spend five hours cursing MSWord - Why does it keep moving the figures?

“Innovation” section comes in a dream

2.5 pages over limit. Must edit

Re-write “Specific Aims” section

Explain to grants office why -20C freezer is not a “household” item

Must delete eight lines of text. Seriously?

Student finishes critical experiment. Make figure

Change tuition from $7825 to $7834. Univ grants office approves budget

Submission Deadline

Confirmation email. No submission errors!

First night w/o nightmares

Plan for life without funding

Life is good. Have a beer

Find two paragraphs out of order. Spelled “protein” as “protien” 8 times

Reduce size of 3 figures. Now within page limits

Reduce single word lines. Reduce space btw paragraphs. Sive 1/4 page

Insert “References.” Why so many?

Write “Abstract”

Write “Abstract” 12 Hours

Remove single word lines. Reduce space btw paragraphs. Sive 1/4 page

Update Biosketch, “Personal Statement”? 

“Students revolt! Insert preliminary data”

Ask colleague to read/critique proposal. What do you mean, “Not enough time”?

Innovation? Innovation?

Univ grants office wants justification for rubber gloves

Panic: No prelim data for Aim 3?

Try to convince self that project is innovative

Set goal: Write “Significance” & “Approach” sections in 3 days

This project is great!

Submit budget to Univ grants office

Nightmares begin

Submit papers in time for review; revision: need “in press” status

Panic! Grant due in fewer than 60 days.
Task Timeline

Components

Review guidelines
Outline proposal
Draft(s)
Lit. Review
Find documenting statistics
Review(s)
Organization grant review process
Final review
Submission
Wait to hear
# Example of a Proposal Task Timeline

Template Grant Writing Task/Timeline

<table>
<thead>
<tr>
<th>Done?</th>
<th>Task</th>
<th>Person/people assigned task</th>
<th>Estimated Duration</th>
<th>Start date</th>
<th>Deadline</th>
<th>Deliverables</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>☑</td>
<td>Decide topics of interest</td>
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<tr>
<td>☑</td>
<td>Literature Review</td>
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<tr>
<td>☑</td>
<td>Get idea and develop plan</td>
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<tr>
<td>☑</td>
<td>Look for funding</td>
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<td>☑</td>
<td>Download all application forms &amp; guideline/instructions</td>
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<tr>
<td>☑</td>
<td>Contact program officer/funding contact</td>
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<tr>
<td>☑</td>
<td>Contact SPOC for clarification of guidelines (as needed)</td>
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<tr>
<td>☑</td>
<td>Review funding agency's priorities</td>
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<td>☑</td>
<td>Review recently funded grants (if a new potential source)</td>
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<td>☑</td>
<td>Letter of intent</td>
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<tr>
<td>☑</td>
<td>Outline then draft proposal</td>
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<td>☑</td>
<td>Id what stats/data you need and where to find them.</td>
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<td>☑</td>
<td>Work with mentors, collaborators</td>
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<td>☑</td>
<td>Send requests for letters of support and/or assurance/MOU</td>
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<td>☑</td>
<td>Identify key personnel, request CV's, biosketches and format</td>
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</tbody>
</table>
How much time do you need?

How familiar are you with writing?

How much time do you have vs. time you need?

How busy are you? Other big events/holidays during your process?

Internal agency grant review process & timeline?
Organization/ Planning Strategies to consider
Planning Strategies

- Organization
- Teamwork
- Time Management

What are some strategies you have used in the past to meet a deadline?
Tackling the work

- Start early - writers block
- Develop a 60 day calendar
- Get a grant writing team
- Assign sections to team
Time Management

Plan your time out, set daily priorities
Set aside blocks of uninterrupted time
“Power Block” time
Time is money make sure you have it

✓ Avoid interruptions
✓ “Do not disturb” sign
✓ Close email and alerts
✓ Set “communications check ins”

It will always take more time then you expect
Organizing Strategies

• **Outline** ALL sections of the proposal.

• Write a **rough draft** without worrying about style or grammar.

• Plan on writing **multiple drafts**.
Review Strategies

• Consider the grant reviewers perspective.

• Have evaluators that can provide critical perspectives of others.

• Ask a colleague to critically evaluate your next to last draft.
Teams & Relationship building

• Strengths-based approach
• Cover all areas of needed expertise
• Relationships
Grant Team

Proposal coordinator
Agency Contact person
Draft Writers
Editors/ Final Editor
Budget Coordinator
Coordinator for letters of support
Graphics Coordinator
Typist and proofreader
Team Advisory Committee & colleagues would be a great addition to your grant writing team.

Subject Matter experts!
Reflection

• How are the strategies that we are exploring similar to the strategies you have used in the past?

• How are they different?
Common Mistakes
Mistakes can hurt

Waiting too long to get started

Not giving enough thought on the front end

Projects that are inconsistent with stated priorities

Proposal exceed page limitations

Lack of all required documents/sections

Missed submission deadlines
Review

- Grant Folder
- Outline and Task timeline
- Time Management
- Team is helpful
S.M.A.R.T.

• Specific
• Measurable
• Achievable
• Relevant
• Time-Bound
Resources

Additional Resources for consideration

- Proposal Planning and Writing. 5th ed. J. Miner & L. Miner. 2013 (library call number 658.1522 Miner)
- [https://www.cdc.gov/phcommunities/resourcekit/resources.html#smart_objectives](https://www.cdc.gov/phcommunities/resourcekit/resources.html#smart_objectives)
- [http://grantproseinc.com/free-resources/](http://grantproseinc.com/free-resources/)
- Logic Model video resource: GrantProse Training Video: On Logic Models [https://www.youtube.com/watch?v=OvaQZRWVVUQ](https://www.youtube.com/watch?v=OvaQZRWVVUQ) (~6 mins) (it is a commercial company that is probably bias- but good info)
- [https://www.projectsmart.co.uk/how-to-write-a-smart-goal.php](https://www.projectsmart.co.uk/how-to-write-a-smart-goal.php)
- [https://www.youtube.com/watch?v=uThBb3kGf4k](https://www.youtube.com/watch?v=uThBb3kGf4k) (How to set SMART goals)
- [http://grantproseinc.com/free-resources/](http://grantproseinc.com/free-resources/)
- Key Performance indicators [https://www.youtube.com/watch?v=NCta6j5_FdM](https://www.youtube.com/watch?v=NCta6j5_FdM) (4 mins)
Review

- Grant Folder
- Outline and Task timeline
- Organizational Tips
- Team is helpful
Time to take off!

Start your grants folder

Get your program data
-PM, Peds Ready, etc

Build your team