



IS MY PROJECT THE RIGHT FIT?

MATCHING IDEAS AND OPPORTUNITIES

Mississippi State University
Office of Research & Economic Development

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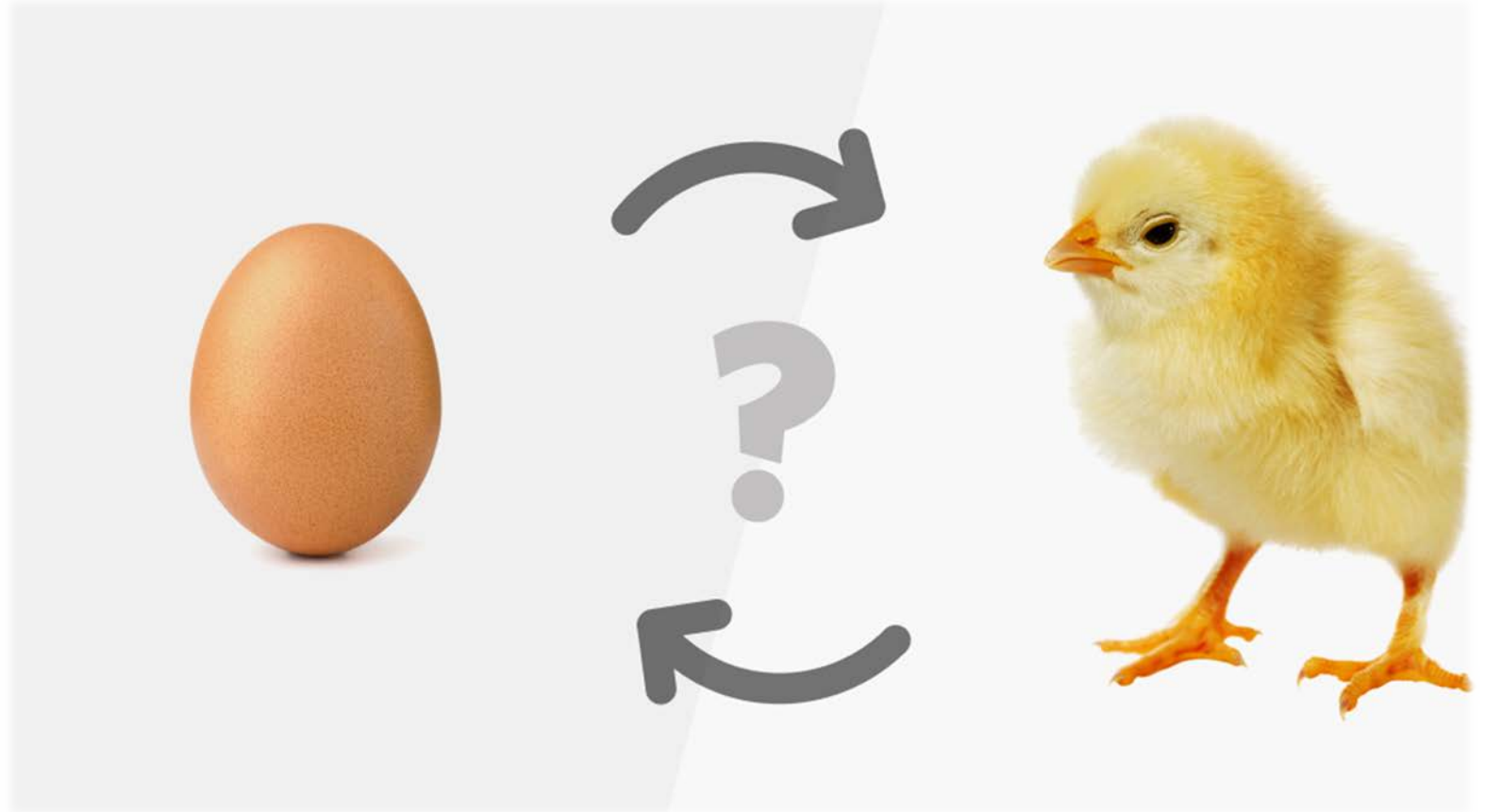
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Find Funding for Your
Specific Project?

OR

Develop Your Project for a
Specific Funding
Opportunity?

WHERE DO YOU WHERE DO YOU START?



Either..... Or both! But there's a catch.....

THE IDEA AND OPPORTUNITY MUST ALIGN FOR A PROPOSAL TO BE COMPETITIVE

Today we will discuss:



how to assess a funding opportunity to determine if your idea is a good fit



some ideas for strategically developing your idea to make it fit an FOA



how to search purposefully for the right opportunity for your idea

BEFORE YOU EVEN BEGIN....

If you are starting with an RFP, dig deeper to understand the main purpose of program (funding priorities).

- ✓ Does idea fit in mainstream or on the fringe? All RFPs contain the info you need to fully understand the funder's purpose. Certain funding streams/programs are strategically-designed to attract high-risk/hi-impact ideas. Which type is yours?

If you are starting with an idea, think behind the “science.” Who or what is the beneficiary of the work you propose?

- ✓ Are you able and prepared to engage various constituencies and/or leverage resources to meet the requirements of a variety of funding opportunities? How broad are your impacts?

STARTING WITH AN RFP OR “CALL FOR PROPOSALS”

RFPs aren't just “the instructions.” They can be used as a tool to help with the strategic design of your project and proposal.

This is just one of many reasons it is so important to start early.

Read the RFP to guide and inform the preparation of a response.

- 1. Identify the funder's purpose and priorities*
- 2. Identify issues of compliance with the funder's regulations*
- 3. Identify the required application structure and process*

BEGIN WITH THE END IN MIND – STARTING WITH AN RFP

Reading and analyzing a solicitation using these steps will help you produce an **outline** of the elements required for your proposal and which...

- Reflects the purpose of the funder,
- Is responsive to the stated review criteria,
- Is formatted correctly
- Is compliant with agency requirements.



*Knowing all of these things early will help you know if your idea is a good fit. For example, if you learn that a stated review element is a “convergent” approach, you know to build your team accordingly.

WHAT TO GLEAN FROM THE FIRST READ OF THE RFP

Purpose.

Most solicitations begin with the purpose of the opportunity. Some will describe not only the purpose of the RFP but will reference where this opportunity fits into the agency's greater goals. This is your cue to learn as much as you can about those goals and priorities and think of ways to demonstrate how your project complements the sponsor's purpose.

- Remember those beneficiaries?
- Is the “market” saturated?
- Will you have to start from scratch?
- Does it empower you to share your passion?

Eligibility

- *Organizational*
 - *Type of institution,*
 - *required partnerships/consortia,*
 - *limit on number of submissions,*
 - *previous or sequential funding recipient?*
- *Individual*
 - *Career status/appointment,*
 - *limit of submissions per role,*
 - *citizenship,*
 - *ability to commit required FTE*

THE FIRST READ FOR “FIT”

Decisions

- *Track or Type*
 - *Are there multiple offerings of scope, budget*
 - *sequential stages?*
- *Key Players*
 - *If there are required partners, will you be able to secure their commitment in time?*
 - *Missing capacity?*

Deadlines

- *"Drop Dead" date*
 - *agency deadline for submission by AOR;*
 - *Does it vary by track or program?*
 - *LOI or preliminary proposal required?*
 - *Consider internal deadlines for your team and partners*
- *Interim tasks*
 - *registrations, approvals for systems and platforms,*
 - *required credentials,*
 - *method of submission*
- *Cycle/forecast*
 - *next opportunity?*

IMPORTANT CONSIDERATIONS FOR “FIT”

Deal Breakers

- *Budget-related*
 - *Costshare?*
 - *Cap on indirect?*
 - *Limit on various categories?*
 - *Is the award ceiling appropriate for the proposed work?*
 - *Unallowable costs?*
- *Realism*
 - *Project period or earliest start date?*
 - *Expected number of awards.*
 - *Sufficient internal and administrative support*
- Research is fundamentally about attention to detail. That goes double for proposal preparation!
- Competition is tight enough for funding. There is no reason a proposal should ever be returned without review due to an omission or formatting error.
- Form, structure, and compliance matter! **Do you have the support infrastructure to prepare a compliant proposal?**
- Before you call a Program Officer with a question about formatting or structure, re-read the RFP.

READING AGAIN (AND AGAIN)

A proposal is a significant investment of time. You owe it to yourself to prepare and set yourself up for success by reading, and re-reading, and marking your solicitation several times. It is worth the effort to read for...

Purpose Compliance Structure

Only by fully understanding the details of solicitation can you potentially mold an idea to fit the opportunity.

STARTING WITH AN IDEA: UNDERSTANDING THE SOURCES & PRIORITIES

Beyond knowing policies and procedures, why do agencies fund what they fund?

- Trends and timeliness – where and how to look
 - Agency strategic plans and “new” releases, “hot” topics, “Grand Challenges”
 - federal and state appropriations <https://www.whitehouse.gov/briefing-room/legislation>
 - The Federal Register, advocacy organizations, educational (general) and discipline –specific literature/journals

Understanding the legislative processes affecting funding streams – where to find info

- Who are the major players? Who’s who in policymaking? Squeaky wheel?
- Read press releases from legislators; attend town halls; visit while in DC; hint: staffers have the scoop

ANSWERS ON THE TEST! FIND A FIT

What you can glean from agency resources

- Agency cycles and forecasting
 - Know the basics and organizational history and structure. Take time to learn about standard funding mechanisms
 - Some projects are announced annually, some are on a rotation. If you've missed a perfect opportunity, make note of when it will roll around again.
- Where to get more “inside” info
 - “working the system” via agency personnel (program officers, reviewers, preferred contractors)
 - Abstracts, locations, and contact info for what has previously been funded
 - Archived webinars and conference programs
 - Data Sources & proposal prep guidance

A DEVELOPMENT APPROACH TO LOCATING THE “RIGHT” FUNDING OPPORTUNITY

- Examine trends in administrative and legislative policy and priorities (current affairs/ political climate and leverage) and how they relate to the type of work. Where is the money pipeline?
- Think about beneficiaries and benefactors – who stands to benefit from the work proposed? How can that benefit be increased through a strategic partnership or collaboration?
- Networking - Who at my institution/in my circle has received funding from this funder and knows about this funder’s priorities & opportunities?
- Funding sources aren’t limited to single investigator projects. Look for ways to engage with others as part of a larger project or subaward.

To Thy Own Self
Be True:

Matching Idea to
Source For A
Personal Fit

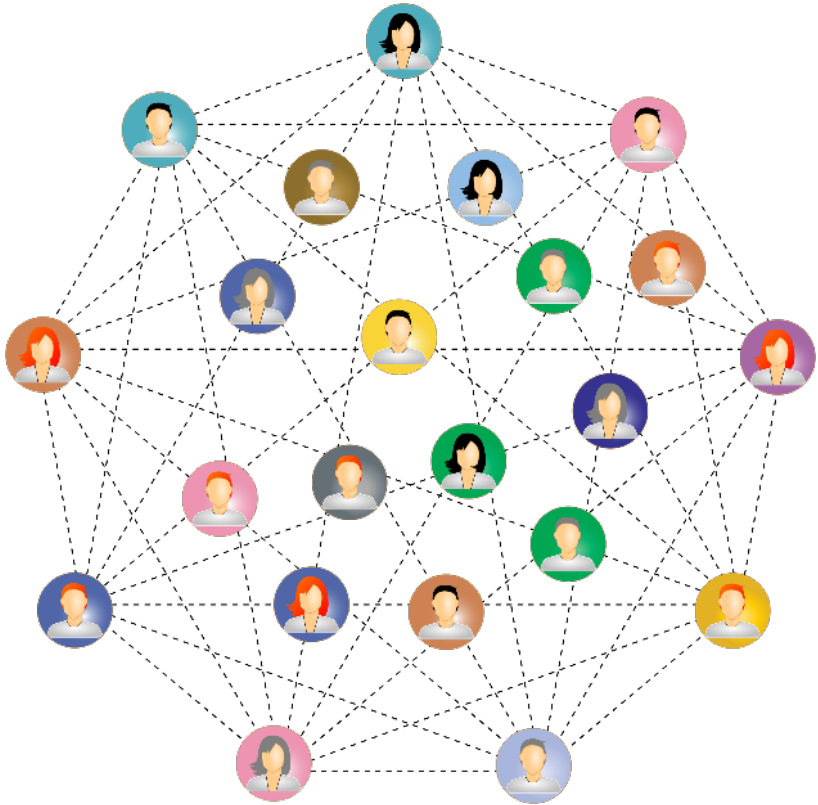
Where are you best equipped to contribute to the overall advancement or impact in your area of expertise?

What are your strengths and proven history? (how can you utilize your networks and experience?) Limitations?

Can you provide strong evidence that you (and your team) are experienced, capable, and have the resources necessary for the work?

Where does your issue fit into YOUR picture?

KEEPING AN EYE OPEN FOR ORGANIC OPPORTUNITIES



- Use your institutional resources and personnel to facilitate introductions
- Stretch your associations – look for collaborators from diverse backgrounds institutionally, geographically, interdisciplinary, culturally, etc.
- Learn about institutional working groups and cross-disciplinary events
- Network at meetings of professional, social, honorary organizations.
- Attend university programs outside of your primary interest areas.
- Learn about the various capacity of your institution's centers, labs, and institutes

Some Best Practices for Finding the Right Fit...

- Pick a few appropriate funders on which to focus, but stay alert to others.
- Search with focus and intention –limit distractions
- Constantly scan – ½ hour per day or set aside a scheduled time to review – agency surfing, lists, eNewsletters, alerts, newsletters
- Keep a journal or digital folder of info on grants/partnerships, etc.
- Consider suggesting an unsolicited proposal – or at least encourage them to prepare a white paper that is ready to share
- Call on the experts!

WHY SHOULD YOU REACH OUT TO A PROGRAM OFFICER?

- POs can assist with determining the correct track for a proposal
- Seek advice/clarification on agency processes
- Gain insight on agency's current funding priorities – which can shift over time in-between published materials
- They may know if a specific program has more flexibility with funding
- Build relationships for future endeavors (consulting, review panel invitations, etc.)

BEST PRACTICES FOR COMMUNICATING WITH PROGRAM OFFICERS

- Identify the correct point of contact for the funding program/mechanism you feel most closely matches the theme of your proposed work. Compare your plan to recently funded projects in that area to make sure your work will make a true contribution.
- Avoid a “cold call” for matters other than succinct questions. For detailed or more complex questions, opt for an email and provide the necessary information for your request.
- Write a white paper OR brief summary, listing your main objectives, methods, and expected outcomes. Stress the uniqueness and how the outcome(s) will contribute to the field. Keep it SHORT!
- Use your manners; Program Officials are people too! Be courteous and respectful of the representatives’ time.
- If possible visit in person and/or take advantage of professional meetings and conferences to grab the ear of an agency representative.

LET'S HEAR FROM THE EXPERT...

WELCOME DR. CARLOS ORTIZ

National Program Leader,

Division Of Community And Education


USDA, National Institute Of Food & Agriculture

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Dr. Ortiz provides leadership to the K-14 Competitive Education Grants portfolio including the WAMS, SPECA, AITC, AFRI-PDAL, AFRI-AWT programs as well as other non-education agency crosscutting programs. He has been with the Division of Community and Education since December 2016 and holds a Ph.D. degree in Plant Pathology from Texas A&M University with expertise in pathogen detection systems and secondary metabolism regulation.

Q & A WITH DR. ORTIZ


- Please use the chat box feature to ask questions.
- We will begin with some general questions and try to accommodate as many from the audience as time allows.




What are some of the most common oversights or mistakes investigators make when selecting a funding opportunity for their project?




If there doesn't seem to be a “perfect fit” funding opportunity for a project, do you have any suggestions or tips for tailoring an idea to meet the specific requirements in a way that isn't contrived?




Are there pros and cons to viewing previously funded proposals as examples of what a funder is seeking?




What are some best practices investigators should employ when contacting an agency Program Official to ask a question?



How might an investigator spend time wisely learning about a sponsor's mission, priorities, initiatives using publicly-available information (i.e. website, archived programs, solicitations)?



Although Pos welcome contact from investigators, are there some questions which shouldn't be asked? Or, what might be some examples of questions POs simply cannot answer?



Would you recommend potential investigators look for opportunities to serve on review panels to learn about the complete proposal process?

A very special MSU thank you to Dr. Ortiz!

Thank you all for participating today!
Please share your feedback with ORED via the
survey you will receive by email soon. You are
welcome to send additional questions to
stephanie@ord.msstate.edu
and we will respond promptly.