

Proposal Prep Best Practices for Teams

- I. Importance of establishing a schedule, timeline, and communication (feedback) from key people early.**
 - Review of solicitation with the group; notify all depts and OSP; contact PO if needed for any clarifications
 - Establish internal deadlines and method of communication (shared folders, online tools, e-mail, submission portal, etc.)
 - See OSP as advocate, not obstacle... early communication is key! Send parts as soon as they are available for review.
 - Create Checklists of proposal elements by solicitation, assignments, contact info, and deadlines. (ORD can develop templates!)

- II. Determining primary and secondary investigators, roles, etc.**
 - Considerations include- expertise and interests, time and resources/access, work style, personality
 - Individual preparation of required docs (biosketch, C&P, RCR, etc.) can be done early. Assign tasks by expertise, for example, the Co-I responsible for mentoring will write mentoring plan. Co-I who manages the lab will write facilities, etc. PI most closely tied to department admin will work on budget. References, etc. Social butterfly coordinates support letters, etc.
 - Consider what expertise is missing – reach out! If additional personnel is needed, what role will they play?
 - Address budgetary issues upfront (effort, allocation of resources for supplies, students, etc.)
 - Confirm external parties' required information for subawards, support letters, other types of formal agreements, letters, etc, and coordinate with proposal support team to acquire them

- III. Authorship (continuity is key)**
 - Provide ORD with outline of key technical info. (Pertinent literature on problem and current state of problem)
 - Write to the solicitation – format, headings, language.
 - Initial team meetings to address 1) purpose, goal, solicitation review and match to funder's goals, address weaknesses and expertise needed and complete checklist. 2) narrative components: walk through need/problem, goals, project design, capacity, eval plan, sustainability, etc. 3) strengthening – compelling, innovative, transportable, sustainable, etc. Keep meetings focused

- IV. Internal feedback and addressing feedback to strengthen proposal**
 - Types of review include peer/colleague (technical) layperson (readability, purpose), sponsored programs (completeness and compliance), pure format and grammar review.
 - Budgetary feedback by dept/dean if needed, and by OSP to ensure compliance
 - ORD can facilitate external and/or peer review.

- V. Ways to identify collaborative opportunities across campus (experts list, research interest groups)**
 - Working groups – make a commitment to meet even if nothing is “on the table”
 - Build time into staff meetings for faculty to share ideas/ solicit feedback, etc. (tough in academia); Attend programs/events of potential collaborators to network, learn of other initiatives
 - ORD can assist with matching research interests/priorities and opps available for dissemination – can be central contact for inquiry on potential collaborators and identification of external resources/expertise