RESEARCH MANAGEMENT TRAINING

Managing the proposal writing process

Jonathan Kayondo, 13th February 2023

GRANT PROPOSAL WRITING: PLANNING TEMPLATE

Laying the Groundwork

- Read the Call in great detail and understand it!
  - As PI you are responsible for steering the direction
  - Be prepared to lead the effort, from the front!
  - Collaborators will only focus on their bits

- Create a task list/s and assign tasks
  - Can't do it alone
  - Everyone involved needs to pull their weight (no free loading)
  - Set task due dates relative to your grant compilation strategy and submission due dates.
    - Factor in your/ collaborator organization review

TASKS

Concept preparation & Partnership assembly

- First Act-PI
  - Define the scope or scientific question
  - Lay out the specific aims
  - Outline the required competencies
  - List the participants
- Invite collaborators
- Create a collaborative project space
  - Populate it with application documents
    - RFA guidelines, Drafts, Templates, Checklists etc
- Request Collaborator input into the concept

Prepare a draft budget

- Estimate personnel needs

- Get a budget template

- Get Budget requests from partners

- Refine budget to meet all requirements

Send out feelers about your Concept to the Agency

- Contact Program Officer (PO) at the granting agency

    – Send an e-mail asking for a phone appointment

    – Attach your concept

    – Talk to the PO about your planned proposal

    – Also listen carefully to the PO

Prepare the Research Plan

- Write a draft Specific Aims page
- Produce a template for the Research Strategy
- Assign deadlines to writers
- Collect individual contributions, verify scope and completeness
- Finalize Research Plan
- Prepare Bibliography
- Get stakeholder buy-in on Research Plan
- Write the Project Narrative and the Summary

Collect Materials on Project Participants

- Make a list of all named participants

- Ensure that all participants have required registrations (e.g. ERA Commons Id)

- Collect biosketches

- Make a list of required letters of support

- Write draft letters of support and collect them

Prepare Annexes

- Prepare Facilities and Equipment descriptions

- Prepare Data Management and Sharing Plan

- Prepare multi-PI or Governance plan

- Check the RFA for other mandatory annexes

Organize Mock Review

- Identify reviewers

- Conduct review

- Update proposal to take into account reviews

Submission

- Hand over to Institution

  - For checks

  - Submission (needs ample time)
    - Give a heads up (5 days prio) to the Organization Signing Official
      - Their accounts and passwords need to be active
    - Be on standby as submission goes through
      - There are usually system errors to address

Conclusion

- It is a lot of work
  - Expect many sleepless nights

- Someone needs to drive it

- RSO if exists can help alot

- Daunting task but just get on with it