



RESEARCH MANAGEMENT TRAINING

Managing the proposal writing process

Jonathan Kayondo, 27th June 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