

Writing Winning Technology Proposals

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Online at: <http://www.serve.org/seir-tec/proposalstips/managing.htm>

Managing the Development of a Proposal

Here are some tips for managing proposals successfully. Some of the suggestions, especially in the Getting Ready section, are specifically related to applications for federal grants, but most of the strategies should be useful for any proposal development effort.

Getting Ready

1. Monitor the Federal Register and other sources of information about upcoming competitions.
2. Call the office of the government agency to which you plan to apply, and ask to be put on the mailing list for applications.
3. Volunteer to be a proposal reviewer, but not for the competition for which you plan to apply.
4. If the competition has been held in prior years, ask the program officer for the abstracts of the projects that have been funded.
5. If you can, go to DC and meet with a program officer. Arrange to look over proposals that have been funded (Freedom of Information).
6. Form a proposal development team. You'll need people with the following skills and experience:
 - content expertise
 - writing
 - editing
 - word processing, including the creation of charts and graphics
 - production (photocopying, putting the whole document together and preparing it for delivery or mail)
 - coordination - someone who is detail oriented to make sure everything gets done correctly and on time
 - management - someone to take responsibility for the whole process and to make decisions in case there are disagreements among team members
7. Create a résumé file of staff members who are likely to be listed as key personnel for the project. Be certain résumés are up-to-date, attractively formatted, and no longer than two or three pages.
8. Create a "blurb" file that will form the basis of the proposal's personnel chapter. A blurb usually contains two or three paragraphs describing a person's current job responsibilities, relevant experience, and education or training.
9. Create a financial file that will help you create the budget. Include current

- information such as salaries, benefits, overhead rates, and per diem rates.
10. If you are going to ask for equipment as part of the budget, figure out what you will need and how much it is likely to cost.
 11. Create a literature file of information or data that could be useful in the first chapter of a proposal. The file might contain language from federal or state legislation, demographic information for the target population, results of surveys or needs assessments, current research literature on the problem to be addressed, or anything else you think you might need.
 12. Identify an evaluation model that will form the basis of the evaluation chapter.
 13. If you have time, conduct a needs assessment of the target population so you can design the project to meet specific needs and so you will have documentation of needs. Quick surveys can be conducted by telephone or by fax.
 14. Identify organizations that would be potential partners in the project. If you haven't written a proposal before, consider going into the project as a subcontractor.

When the Application Package Arrives

1. Check the due date for proposals. See if it is for the day and time they are due in Washington or the date they must be received by the application control center.
2. Check to see if there is a page limit. If so, don't even think about going over it.
3. Call the program officer and let them know you are interested in applying. Try to find out as much as you can about the competition - who is likely to apply, how many proposals are expected, how many will be funded. Also ask them about specific things they will be looking for in proposals that might not be discussed in the application package, such as emphasis on minority or economically disadvantaged populations. Ask the program officer if they would be willing and able to discuss your ideas for a project.
4. Network with colleagues in other organizations to gather intelligence on potential competitors and to find out if there is an incumbent or if someone has an inside track.
5. Let key personnel within your organization know that you are planning to submit a grant proposal and ask for their support and understanding.
6. To the extent possible, have every member of the proposal team clear their calendars for 10 work days before the due date. You'll probably have to work in the evenings and on the weekends, too.
7. Look over the forms in the application package to see if you have all the requested information on hand, such as the congressional district, and the employer identification number.

Writing the Proposal

1. Give every member of the team a copy of pertinent information from the application package.
2. Bring the members of the proposal team together to discuss the goals and objectives of the project.

3. As soon as you've nailed down the goals and objectives, start working on the budget to make sure you can do what you want to do within the funding limit. That way, you won't have to keep revising the plan of operation's description of proposed activities under each objective. A preliminary budget will also help you identify staffing levels (FTEs), which you can plug into the personnel chapter and the person loading chart.
4. Decide who is going to be involved in the project, both within and outside the organization.
5. As soon as possible, ask partners, consultants and other involved parties to write a letter of support or agreement. Give them a deadline that is three days before the due date (they'll probably fax it at the last minute anyway). They might want you to provide them with some language for their letters, but try to keep all the letters from containing the same wording.
6. Make writing assignments. If feasible, let people choose which chapter(s) they want to write. Ask junior staff to work on the "back" chapters. An assistant can collect the résumés and create word processing shells for each chapter.
7. Develop a timetable for everyone to finish their assignments. You should have good drafts of all the chapters at least five days before the proposal is due. Reserve the last 24 hours for final editing, photocopying, and mailing/delivery. Have "a naive pair of eyes" read your proposal while you still have time to make changes in it.
8. As each chapter is completed, give it a hard edit and then give it to the person who will do the word processing. That person will format it and insert the charts and graphics. Once it's in their hands, subsequent changes should be made on hard copy rather than disk to avoid confusion over which version is the freshest.
9. Once you have a copy of all the chapters, have someone who is detail oriented read through the entire document to look for inconsistencies, especially in the way you talk about goals and objectives from chapter to chapter and in the allocation of personnel time (FTEs).
10. It's a good idea to put the date or time on each version of edits.
11. Don't wait until the last minute to have the head of your organization sign the forms.
12. Try to remain calm.

While You are Waiting for the Results

1. Call your Congressional representatives and let them know you have applied for a grant and which agency is reviewing it. They might ask you to send them a copy.
2. After a couple of months, you can call the program officer to find out if the proposals have been reviewed and when announcements will be made.
3. Keep your fingers crossed.