

Research Administration Practices (RAP) Sessions

Managing Large Proposals

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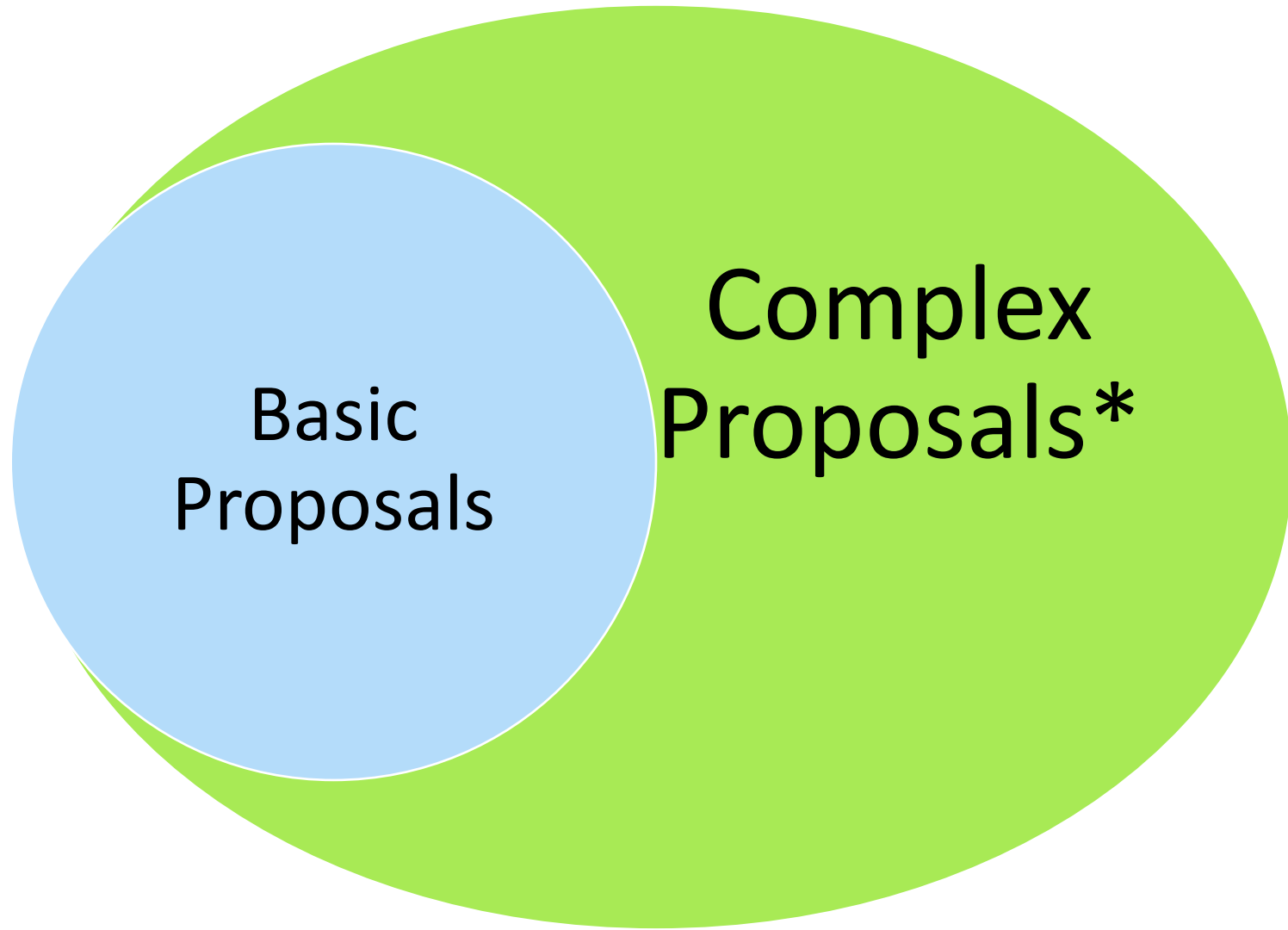
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Agenda

- Welcome and introductions
- Large/complex proposals
- Planning
- Checklists
- More specific tips



Basic
Proposals

Complex
Proposals*

* Note increased scale & scope

What makes it complex?

1. People, space, and money

- Occupy more space on campus
- Cross cut multiple disciplines

2. More and more varied stakeholders

- Multiple organizations
- Multiple DLCs
- Government agencies (both local, state, and federal)

3. Intricate involvement/cooperation

- Within the Institute
- Between institutes
- Consortia

4. Expanded technical requirements (KC, sponsor systems, etc.)

Dealing with Complexities

1. Understanding the project's specific challenges
2. Engaging the stakeholders
3. Managing the process
4. Troubleshooting technical issues

Understanding the project's specific challenges:

Know what you are getting into

- Read the entire solicitation multiple times
 - Draft/use a check-list
 - Ask questions
- Set internal due dates
 - Work backwards from sponsor due date
 - Aim for a completed draft 2 weeks prior to sponsor due date
 - Consider editing and feedback time
 - Do you need an internal and/or external review panel?
 - Do you need an internal/external proofreader?
 - Remember: Dean's office review/OSP requirement/external partner deadlines
- Consider dependencies
 - What are the questions that I need to have answered before a budget can happen?

Understanding the project's specific challenges:

Questions to ask

- KC COI questions
 - Have participating PI's answer these questions at beginning of project
 - Review throughout project and when anyone is added to proposal team
- What will be the impact on campus resources? (Cost share, space, etc.)
 - Who will need to approve?
 - What timing is needed for these decisions?
- Will you need to engage external partner leadership?
 - Develop a strategy
 - This will usually take more time than anticipated
 - What key decisions/approvals are needed
 - Will you need MIT leadership assistance?
- Will you need MIT leadership approvals/support
 - Establish a briefing strategy/schedule

Engaging the stakeholders early:

Identify proposal team partners

- What is your new role?
 - Your leadership is key to the success of this proposal process; take charge!
- Look to OSP/VPR
 - Notify CA as soon as you know about the project for interpretation of solicitations/support
 - Research Development team: who has done this before?
 - RA-Help – anytime you need assistance or have a question
- Identify project team
 - Establish key roles and responsibilities for core team (typically 3-6 people)
 - Get contact numbers and identify who can make decisions as needed
 - Identify other resources that you'll need to prepare the proposal
- Identify the stakeholders *involved in or affected by* project activities
 - Review takeaway for brainstormed internal stakeholders
 - Who are external stakeholders?

Managing the process:

Establish a communications plan

- Method:
 - In-person, Skype/WebEx, email, phone
- Frequency:*
 - Lead PI/technical contact – 1:1 *at least* weekly check-in
 - Core proposal team - weekly check-in
 - Etc.
- File sharing:
 - Dropbox, google docs, GitHub; but don't use too many

*Frequency tends to increase as the due date gets closer.

Managing the process:

Drafting the proposal

- Put draft sections out for team review/reaction early
- Assign leads for each section/deliverable
 - Set draft due dates that allow for editing and review by team
 - Set full team meetings to discuss draft
- Set administrative section deadlines early
 - Biosketches/C&P
 - Certifications

Troubleshooting technical issues

Technical tips & takeaways

- Don't worry alone: When in doubt reach out to RA-Help/your CA
- Budget: Don't reinvent the wheel; use samples
- Data Management Plan: Use the library tool!
- External Co-PI certification
- Test submission systems
- Docs to take home:
 - Checklist
 - Questions to ask
 - Stakeholders
 - Operating procedures

Questions/Your best practices

- Tell us about your best practices
- Sign up to be available for support to others
- Presenters of today's RAP session
 - Karen Shirer – shirer@mit.edu
 - Cathy Borgesen – borgesen@mit.edu
 - Stephanie Toews-Moeling - srichar@mit.edu
 - Clinton Campbell – clintonc@mit.edu
- Your OSP Contract Administrator - <https://osp.mit.edu/about-osp/staff/by-administrator>
- RA Support Team - RA-help@mit.edu