

We have the team, we have the funding opportunity, *now what?*

Best practices, tools, & resources to support large-scale proposals

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Today's Topics

- Building Relationships
- Project Management
- Facilitating Meetings
- Writing / Editing
- Finding Resources



MCIRCC Large-Scale Grants

Funded:

- American Heart Association - Strategically Focused Research Network

Submitted:

- DoD Medical Research Program - Focused Program Award
- NIH NHLBI - Po1 Program Project Grant

In Preparation:

- NIH NIGMS - RM1 Collaborative Program Grant for Multidisciplinary Teams

BUILDING RELATIONSHIPS

With the PI, the team, & the grants administrator

...with the PI

- Why:
 - Understand their approach + needs
 - Help implement team science best practices
 - Set expectations
- How:
 - Meet face-to-face
 - Ongoing / frequent meetings
- Tip: Determine contact preference



Building Relationships

...with the team

- Why:
 - Help manage team dynamics
 - Get team members to respond quickly
- How:
 - Have PI state your credibility
 - Give elevator pitch on how you will help
 - Participate in team meetings
- Tip: Determine their contact preferences



Building Relationships

...with the grants administrator

- Why:
 - Clarify roles/responsibilities
 - They have important skills/knowledge
- How:
 - Meet face-to-face
 - Check in frequently
 - Invite to relevant team meetings
- Tip: Have PI introduce you to their grants administrator

Building
Relationships



PROJECT MANAGEMENT

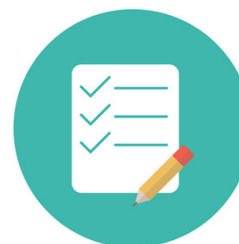
To keep you and the team on track

Project Checklist

Project Management

- Why:
 - Help you and team track progress
 - Helps you understand what is required

- How:
 - Review FOA in depth several times
 - Then create checklist by going through FOA line-by-line



Project Checklist Example

	Overall	Project 1	Project 2	Project 3	Project 4	Admin	Animal	Clinical
Title	Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete
Cover Letter	Complete	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Project Summary	In progress	Complete	not started	not started	Complete	In progress	Complete	Complete
Project Narrative	Complete	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Specific Aims	not started	Complete	in progress	Complete	Complete	Complete	Complete	Complete
Research Strategy	not started	Complete	in progress	Complete	not started	Complete	Complete	Complete
References	in progress	not started	Complete	Complete	not started	N/A	In progress	Complete
Facilities	in progress	not started	Complete	in progress	Complete	Complete	in progress	in progress
Equipment	Complete	In progress	Complete	in progress	N/A	N/A	Complete	in progress
Biosketches	Complete	in progress	Complete	Complete	Complete	Complete	Complete	Complete
Budget	N/A	Complete	in progress	Complete	in progress	not started	Complete	Complete
Budget Justifications	N/A	Complete	Complete	in progress	Complete	Complete	not started	not started
Vertebrate Animals	N/A	N/A	N/A	N/A	N/A	N/A	Complete	N/A
Select Agent	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Multi PI Plan	Complete	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Letters of Support	Complete	N/A	N/A	N/A	Complete	Complete	Complete	Complete
Resource Sharing Plan	N/A	N/A	N/A	N/A	N/A	Complete	N/A	N/A
Authent Key Bio	N/A	Complete	Complete	Complete	N/A	N/A	N/A	N/A
Human Subjects	N/A	N/A	N/A	N/A	N/A	N/A	N/A	in progress

Project Checklist Example

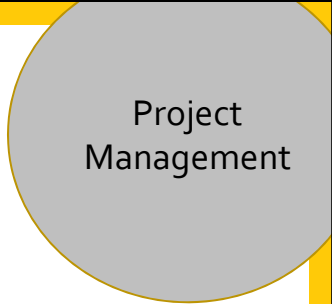
Status	Proposal Section	Pages	Notes	Responsible	Due Date
In Progress	Project Narrative	40 pages	Attachment 1: "ProjectNarrative.pdf"	Meagan start draft, all contribute	6/17/19
Not Started	Technical Abstract	1 page	Attachment 3: "TechAbs.pdf"	Meagan draft, Kayvan finalize	6/17/19
Not Started	Lay Abstract	1 page	Attachment 4: "LayAbs.pdf"	Meagan draft, Kayvan finalize	6/17/19
In Progress	Statement of Work	8 pages	Attachment 5: "SOW.pdf"	Meagan template, all contribute	6/17/19
In Progress	Impact Statement	2 pages	Attachment 6: "Impact.pdf"	Meagan draft, Kayvan finalize	6/17/19
In Progress	Relevance to Military Health Statement	1 page	Attachment 7: "MIRel.pdf"	Meagan draft, Kayvan finalize	6/17/19
In Progress	Transition Plan and Regulatory Strategy	3 pages	Attachment 8: "Transition.pdf"	Kayvan/Jonathan	6/17/19
In Progress	Data and Research Resource Sharing Plan	1 page	Attachment 9: "Sharing.pdf"	Kayvan/Jonathan	6/17/19
Not Applicable	IND/IDE Documentation		Attachment 10: "IND-IDE.pdf"		
Complete	Representations		Attachment 11: "RequiredReps.pdf"	Helen	6/3/19
Not Applicable	DoD Military Budget Form		Attachment 12: "MFBudget.pdf"		
	Supporting Documentation		Attachment 2: "Support.pdf"		
In Progress	References			???	6/17/19
In Progress	List of Abbreviations			Meagan	6/17/19
Complete	Facilities, Equipment, Resources			Meagan	6/3/19
In Progress	Publications and/or Patents			Kayvan/Jonathan	6/17/19
Complete	Letter(s) of Organizational Support		Bob Neumar, Steve Kunkel, Standiford, Mulholland	Meagan draft	6/3/19
Not Applicable	Letter(s) of Collaboration				
Not Applicable	Letter(s) of Commitment				
In Progress	Intellectual Property			Kayvan/Jonathan	6/17/19
Not Applicable	Use of DoD Resources				
Not Applicable	Use of VA Resources				
	Biosketches				
Complete	Kayvan Najarian Biosketch	5 pages	"Biosketch_Najarian.pdf"	Santino request, Helen check	6/3/19

Project Timeline

- How:
 - Get dates/expectations from PI + grants administrator
 - Then get buy-in from team

- Tips:
 - Start with end date and move backwards
 - Try to spread responsibilities out for each person over time

- Tools:
 - Excel
 - Project management software (e.g., Trello, MS Project, QuickPlan)



Project Timeline – Excel Example

Status	Due Date	Deliverable	Responsibility	Notes
C	9/19/17	Letter to Potential Project/Core Leaders	Kathleen	
C	10/19/17	P01 Team Meeting #1 (KICKOFF)		Initial brainstorming meeting
C	12/19/17	P01 Team Meeting #2		Finalize structure and develop research questions
C	2/11/18	Submit MICHR Accelerating Synergy pre	Kathleen/Richelle	ARDS pig prelim data
C	3/12/18	Specific Aims Drafts due	Project/Core Leads	
C	3/12/18	P01 Team Meeting #3		Discuss aims, prelim data, teams for each component, next steps
C	4/27/18	P01 Team Meeting #4		Update on MICHR app, update on clinical cohort definition, project/core next steps
C	4/30/18	Submit MICHR Accelerating Synergy full	Kathleen/Richelle	ARDS pig prelim data
C	6/1/18	P01 Team Meeting #5		Project presentations (15 min informal)
C	6/28/18	P01 Team Meeting #6		Project + Core presentations (15 min informal)
C	7/25/18	Meagan / Kathleen / Denise meet		
C	7/26/18	P01 Team Meeting #7		Core presentations (15 min informal)
C	7/30/18	Meagan / Kathleen / Denise / Victoria meet		
C	8/3/18	One page to NHLBI to set up call with PO	Kathleen	
C	8/17/18	Call with PO	Kathleen	Received positive feedback
C	8/21/18	Meagan / Kathleen / Denise meet		
C	8/30/18	Send checklist to Victoria	Meagan	
C	8/31/18	Initial budget drafts due	Project/Core Leads	
C	8/31/18	Research strategy outline due	Project/Core Leads	
C	8/31/18	P01 Team Meeting #8		Discuss programmatic aims/plan
C	9/6/18	Kathleen / Ted / Meagan meet		Review budgets / projects -- identify issues
C	9/25/18	Meagan / Kathleen meet		Review timeline
C	9/27/18	P01 Team Meeting #9		Discuss project and core plans and budgets - make all hard decisions re: scope/\$

Project Timeline – Trello Example

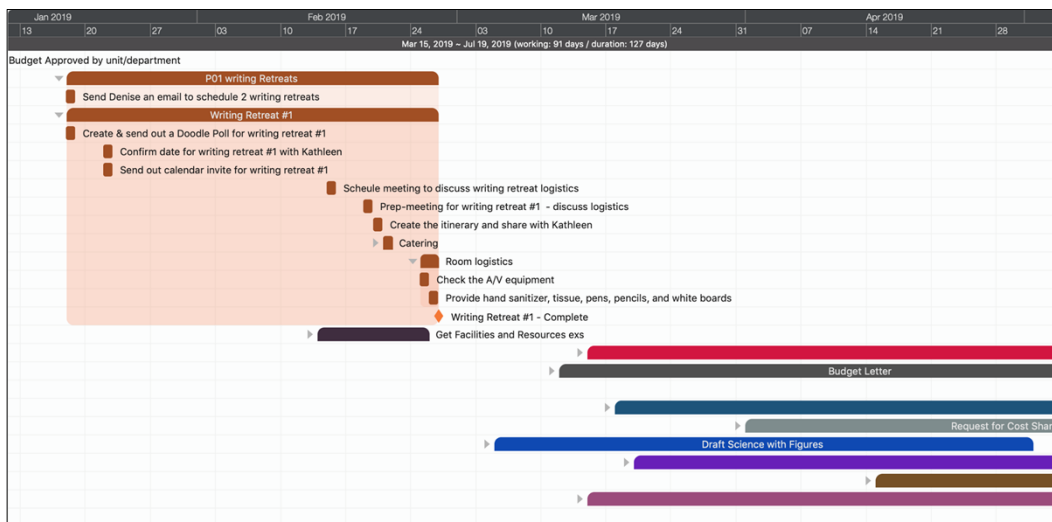
The screenshot shows a Trello board for 'Stringer P01' with several sections:

- Grant Information:** Includes grant info, PI names, and application details like 'RFA - *Submit Grant on Sep 11* - (Sep 25): NIH Application Due \$1,765,000 in DC'.
- Project Timeline / Milestones:** A list of tasks with due dates and completion status:
 - July 31: Cost Sharing "Final" (Completed)
 - Aug 19: Admin Shell Due (Completed)
 - 9/13: Final Science (Completed)
 - Submit Grant on Sep 16 - (Sep 25): NIH Application Due (Completed)
 - Complete project close tasks (adjourning) (Due Oct 1)
- High Priority Activities:** Tasks like 'Review all Aims/Research Strategies for Full Submission' and 'Ensure all project summaries updated to match final aims pages'.
- Overall and Cores - Files:** A list of completed tasks related to specific aims and research strategy.
- Completed Activities:** A list of tasks that have been finished, such as 'Send all figures to Kate' and 'Grant Editing (provided by MICHR): Aug 19 to Sept 4'.

Project Timeline – Quick Plan Example

WBS	TASK	START	FINISH	DAYS	%	RESOURCE
	Budget Approved by unit/department	Jan 10, 2019	Sep 25, 2019	185	4%	
1	PO1 writing Retreats	Jan 18, 2019	Feb 26, 2019	28	✓	
2.1	Send Denise an email to schedule 2 writing retreats	Jan 18, 2019	Jan 18, 2019	1	✓	Santino Jones
2.2	Writing Retreat #1	Jan 18, 2019	Feb 26, 2019	28	✓	
2.2.1	Create & send out a Doodle Poll for writing retreat #1	Jan 18, 2019	Jan 18, 2019	1	✓	Denise Poirier
2.2.2	Confirm date for writing retreat #1 with Kathleen	Jan 22, 2019	Jan 22, 2019	1	✓	Denise Poirier
2.2.3	Send out calendar invite for writing retreat #1	Jan 22, 2019	Jan 22, 2019	1	✓	Denise Poirier
2.2.4	Schedule meeting to discuss writing retreat logistics	Feb 15, 2019	Feb 15, 2019	1	✓	Denise Poirier
2.2.5	Prep-meeting for writing retreat #1 - discuss logistics	Feb 19, 2019	Feb 19, 2019	1	✓	Kathleen Stringer; Meagan Ram
2.2.6	Create the itinerary and share with Kathleen	Feb 20, 2019	Feb 20, 2019	1	✓	Meagan Ramsey
2.2.7	Catering	Feb 21, 2019	Feb 21, 2019	1	✓	
2.2.8	Room logistics	Feb 25, 2019	Feb 26, 2019	2	✓	
2.2.8.1	Check the A/V equipment	Feb 25, 2019	Feb 25, 2019	1	✓	Denise Poirier
2.2.8.2	Provide hand sanitizer, tissue, pens, pencils, and white boards	Feb 26, 2019	Feb 26, 2019	1	✓	Denise Poirier
2.2.9	Writing Retreat #1 - Complete	Feb 26, 2019	Feb 26, 2019	0	✓	
3	Get Facilities and Resources exs	Feb 14, 2019	Feb 25, 2019	8	✓	
4	PO1 Team Meetings	Mar 15, 2019	Jul 12, 2019	86		
5	Budget Letter	Mar 12, 2019	May 15, 2019	47		
6	Letter of Intent Due	Jul 15, 2019	Aug 15, 2019	24		
7	Writing Retreat #2 - (correct dates to align with August schedule)	Mar 18, 2019	Aug 23, 2019	115	60%	
8	Request for Cost Sharing	Apr 1, 2019	May 27, 2019	41		
9	Draft Science with Figures	Mar 5, 2019	May 1, 2019	42		
10	External Review documents (10 total)	Mar 20, 2019	Aug 22, 2019	112		
11	MaryJo Review	Apr 15, 2019	Sep 6, 2019	105		
12	External Review Process	Mar 15, 2019	Jul 19, 2019	91		
13	Final Science with Figures	Aug 12, 2019	Sep 1, 2019	15		
14	Route PAF (1 Month prior to NIH submission due date)	Aug 19, 2019	Sep 2, 2019	11		
15	Application due to NIH	Sep 25, 2019	Sep 25, 2019	0		

Project Timeline – Quick Plan Example



Getting Team to Meet Deadlines!

Project Management

- How:
 - Have PI establish expectations up front
 - State upcoming deadlines in team meetings
 - Send individual reminders in advance of each deadline

- Tips:
 - Always build in extra time
 - Provide rationale for deadlines



Getting Team to Meet Deadlines!

Email Language

Hi team,

I am including several important things for the ALI/ARDS DoD Focused Program Award here.

First, I have attached [meeting notes](#) Santinio created from our kickoff meeting on Tuesday in case you missed it.

Second, I am linking to our [team Box](#) folder [here](#) that you should all have access to. In this folder, you can find Guidance Documents (e.g., the RFA, the review criteria, and abstracts from previously funded Focused Program Awards), as well as Proposal [Drafts](#) I have started.

Third, I am outlining our [writing schedule](#) below (also attached). Most importantly, please note that **we need a first draft of the Project Narrative by next Friday, May 17**. I will help draft the intro section, **M***, B*** S****, and H***** will need to draft their Projects (6 pages each)**, and [Kayvan](#)/Jonathan will draft the integration/summary portion. Please use the Project Narrative draft on Box [here](#) to draft your portion (this includes comments with instructions and page budget info for each section). It is ok if the first draft is rough and not fully complete, but it is critical that we start getting this on paper given the tight deadline. Santinio will be sending reminders to help keep us on track. Please let me know if you have any concerns.

Finally, we have scheduled several [team meetings](#) between now and the due date to allow us to collaborative plan, keep us on track, and give us opportunities to discuss any issues that arise while we are writing. Please all try to make as many of these meetings as possible to help us ensure a competitive submission.

DoD ARDS Focused Program Writing Schedule:

Main Portion (40-page Project Narrative – includes Overall/Intro, Four Projects, Summary/Integration):

- Project Narrative first draft (and figure requests) due **Friday, May 17**
- Edits to others' portions of Project Narrative draft due **Tuesday, May 28**
- Revisions to your portion of Project Narrative due **Monday, June 3**
- Finalize your portion Project Narrative (based on Meagan's final edits) due **Thursday, June 13**

Admin Shell Files

- Budget feedback due **Thursday, May 16** (see previous email from Jonathan)
- [Biosketches](#) and DoD-style Previous/Current/Pending Support due **Wednesday, May 22**
- Edits to budget justification + facilities due **Friday, May 24**

Other Required DoD Files (e.g., Impact Statement, Relevance to Military Health, Statement of Work, etc.)

- Edits due **Friday, June 7**

Thanks!
Meagan

Writing Schedule / Timeline Example

DoD ARDS Focused Program Writing Schedule/Timeline

Main Portion (40-page Project Narrative – includes Overall/Intro, Four Projects, Summary/Integration):

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Other Required DoD Files (e.g., Impact Statement, Relevance to Military Health, Statement of Work, etc.)

- Edits due **Friday, June 7**

Submission Deadlines

- Submit Administrative Shell documents on **Monday, June 3**
- Final Science documents due on **Monday, June 17**

Roles / Responsibilities

- Why:
 - Helps build accountability
 - Helps clarify what you are responsible for early
- How:
 - Determine with PI + grants administrator
 - Then get team buy-in

Project Management



Gathering Biosketches / Other Support

Hello Team,

I am reaching out to obtain your most up-to-date biosketch and your Previous/Current/Pending support for the ALI/ARDS DoD Focused Program Award. Please send to me by **Wednesday, May 22**.

Note that we can use your NIH Biosketch for this, but **please revise your personal statement specifically for the DoD Focused Program Award**.

Additionally, please note that DoD has extra requirements for an Other Support page. I am pasting their full instructions below (with some of the DoD-specific instructions highlighted), as well as an example DoD-style Other Support file in case helpful.

Thank you,
Santino

DoD Other Support Instructions: For all **previous (award period of performance ending within the past 5 years)**, current, and pending research support, include the title, **time commitments**, supporting agency, **name and address of the funding agency's procuring Contracting/Grants Officer**, performance period, level of funding, brief description of the project's goals, and **list of the specific aims**. If applicable, identify where the proposed project overlaps with other existing and pending research projects. Clearly state if there is no overlap.

FACILITATING MEETINGS


To help the team have productive meetings and make progress

Facilitating Meetings

Meeting Agendas + Pre-Work

- Why:
 - More efficient / focused meetings

- How:
 - Plan agenda with PI in advance and distribute
 - Distribute "homework" a week in advance



Meeting Agenda Example

P01 Team Meeting Agenda
Thursday, February 14th, 2019
 6340 MSRB III
 2:00-3:30pm

1. **Primary Meeting Objectives**
 - Core/Project Updates:
 - i. Animal Core (everyone getting data they need?)
 - ii. Project 4 (any remaining questions?)
 - iii. Clinical Core (human subjects?)
 - Plan for Supporting Figures + Documents
 - i. Figures needed?
 - ii. Facilities & resources for each section
 - iii. Biosketches
 - Program Name / Acronym?
2. **Next Steps**
 - **HOMEWORK:** Review and red ink everyone's research strategy sections on [Box](#) prior to retreat
3. **Key Dates**
 - Writing Retreat: Tuesday, Feb 26 in NCRC building 32
 - External Review: March 15 – May 1 |
4. **Next Meeting (after Writing Retreat)**
 - Friday, March 15th, 3:30–5:00pm at NCRC

Meeting Pre-Work Email

Team-

In order to stay on track for our planned external P01 review please carefully read the following:

1. **UPLOAD TO OUR MBOX** if you have not yet done so, **your project or core aims and research strategy draft** (this is a rough draft) **no later than MONDAY, Feb. 18**. I am going to start being a pest about this because these need to be available to me and the team in advance of our writing retreat (see #2 below)!
2. **Project PIs** please review (and red ink via MBox) the PROGRAM and SCIENTIFIC CORES (make sure the cores are giving you what you need) in advance of the writing retreat.
3. **Project and Core PIs** if you have not yet done so, please review this table that pertains to data generation: <https://docs.google.com/document/d/1f-jM31hZ61l0f-blw79TcUj2AhKueXF6ozao7w2M/edit?usp=sharing>
4. Meagan/Santini will be contacting you about your biosketch and facilities and resources page.
5. **I'd like all PIs to submit an acronym/title** for the P01 application – we'll take a vote at the writing retreat.

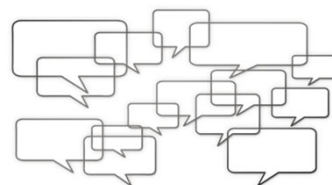
Our next meeting is our writing retreat on February 26th at the NCRC.

Many thanks,

Meeting Facilitation & Follow-Up

Facilitating Meetings

- Facilitation:
 - Help PI stick to agenda to ensure meeting objectives met
 - Help steer conversation if off track
 - Help ensure all voices heard
 - Display agenda/slides and have virtual screen-share option
- Follow-up:
 - Record and distribute action items after



Meeting Follow-Up Email

Hi Team,

Here are the action items that I captured during today's meeting. Please review and let me know if I've missed anything.

Also, please send me your NIH-style biosketch and NIH-style Other Support documents **no later than Tuesday, September 3**. I've attached a sample version of the NIH-style other support document for you to reference if necessary.

Action item:	Who's responsible:	Due by:	Completed on:
Send animal data to the team	H****	8/29/19	
Send animal budget to Kevin/team	H****	8/29/19	
Send Kevin resources/budget needs for the grant	Team	9/1/19	
Send revised specific aims to the team	K****	9/1/19	

Our next meeting is scheduled to take place next Thursday (9/5) at 1pm in building 10 – room G065.

Thank you,
Santino

Types of Team Meetings

- Brainstorming Meeting
- Kickoff Meeting
- Ongoing Team Meetings
- Writing Retreats

Facilitating Meetings



WRITING + EDITING + VISUAL AIDS

To help develop clear, consistent, compelling proposal package

Files Templates + Style Guide

- Why:
 - Help team organize content logically
 - Help ensure consistency
 - Ensure follows FOA guidelines
- How: Start with generic template and adapt per FOA
- Tip: Base style guide on PI preferences

Writing +
Editing +
Visual Aids

Files Templates Example

Research Strategy: Project X

SIGNIFICANCE
 <Background/Need for Study – Heading>
 <text here>
Rigor of Prior Research
 <text here>
 Proposed Project
 <text here>
 Expected Impact
 <text here>
Programmatic Contribution
 <text here>
INNOVATION
 <overview text here>
 • <Innovation 1>. <text here>
 • <Innovation 2>. <text here>

APPROACH
Study Design
 Overview. <text here>
Addressing Weaknesses in Rigor of Prior Research. <text here>
 Aim 1. XXX
Preliminary Data. <text here>
 XXX. <text here>
 XXX. <text here>
 Expected Outcomes. <text here>
 Potential Pitfalls & Alternative Strategies. <text here>
 Aim 2. XXX
 Preliminary Data. <text here>
 XXX. <text here>
 XXX. <text here>
 Expected Outcomes. <text here>
 Potential Pitfalls & Alternative Strategies. <text here>

Table X. Timeline

	Year 1			Year 2			Year 3			Year 4			Year 5		
XXX	Q1	Q2	Q3	Q1	Q2	Q3	Q1	Q2	Q3	Q1	Q2	Q3	Q1	Q2	Q3
XXX															
XXX															
XXX															

Synergy with other Projects and Cores
 <text here>

Meagan Ramsey
 This is essential! More that the language "rigor of prior research" will replace "scientific premises" starting Jan 25, 2019 (see notice [here](#)). Specifically, you should "describe the strengths and weaknesses in the rigor of the prior research (both published and unpublished) that serves as the key support for the proposed project."

Ramsey, Meagan
 Per the instructions, clearly explain:
 1. How this Project will contribute to the overall Program goals.
 2. How the Project is relevant to the Program theme.
 3. Why this project is best pursued as part of this Program rather than an independent R01-type project.

Ramsey, Meagan
 Ensure you address principles of scientific rigor and biological variables. See MR overview for this [link](#) and review guidance for rigor and transparency [here](#).

Meagan Ramsey
 Per MR updates, in the Approach section, you now need to: "Describe plans to address weaknesses in the rigor of the prior research that serves as the key support for the proposed project" (see notice [here](#)).

Ramsey, Meagan
 If you prefer to provide all your preliminary data at the beginning of the Approach rather than by Aim, you can use the below formatting prior to "Study Design" instead:
Preliminary Data
 Aim 1. <text here>
 Aim 2. <text here>
 Aim 3. <text here>

Meagan Ramsey
 If you prefer to provide your overall expected outcomes and the overall potential pitfalls at the end of the Approach rather than by Aim, you can use the below formatting prior to "Benchmarks for Success & Timeline" instead:
Expected Outcomes
 <text here>
Potential Pitfalls & Alternative Strategies
 <text here>

Ramsey, Meagan
 Describe the interactions this Project will have with other Projects and Cores. A figure may also be good here.

Style Guide Example

Formatting and Style Guide

Text Guidelines:

- Arial 11pt font in black
- Single spacing (1.0)
- Margins 0.5 inch all around
- Align text to the left (ragged right margin)
- Do not indent paragraphs
- Use a 8-9pt size blank line between paragraphs (set using line and paragraph spacing function)
- Single space following each period

Guidelines for Headers:

- **Research Strategy: Project X/Core X** (centered on page)
- **SIGNIFICANCE** (text follows on next line)
- **Heading is Capitalized Like This** (text follows on next line)
- **Subheading is Capitalized Like This with Period.** Text follows immediately.
- **Sub-subheading is not capitalized and is italicized.** Text follows immediately.
- **INNOVATION** (text follows on next line with no space between)
- **APPROACH** (text follows on next line with no space between)
- **Heading is Capitalized Like This** (text follows on next line with no space between)
- **Subheading is Capitalized Like This with Period.** Text follows immediately.
- **Sub-subheading is not capitalized and is italicized.** Text follows immediately.

Guidelines for Tables and Figures:

- **Tables:**
 - o Table titles = top row of the table, title bolded, Arial 10pt font
 - o Table main text/info = Arial 9–10pt font
 - o Table notes = final row of the table, Arial 9pt font
- **Figures**
 - o Figure title and caption = place under the figure, title bolded/italicized, Arial 9–10pt font
 - o The figure and caption should have a black outline around it
 - o MCRCC's Marketing team will create the figures for you (not the captions)

Guidelines for Emphasizing Text:

- Use underline to emphasize text where needed (use sparingly)
- Bold first use of acronyms (in each component)
- Bold mention of Figures/Tables in text (Figure X)
- Italicize reference to other sections (for example: see Project 4 (RadioPhysiome) Research Strategy)

Style Guide:

- Use acronyms sparingly. Spell out on first use, with acronym bolded and in parentheses.
- Include a comma for all numbers in the thousands (X,XXX)
- Format numbered lists as XXX, 1) XXX, 2) XXX, and 3) XXX
- Use "double quotes" rather than "single quotes." Put periods and commas inside closing quotes.
- Use the serial/oxford comma in lists
- Use periods and commas for e.g., and i.e.,
- No spaces around = < > ~
- No automatic hyphenation at the end of lines

Drafting Supporting Docs

- Why:
 - Enhances consistency
 - Relieves burden on team
- How:
 - Start with generic template
 - Get team examples from previous grants



Writing +
Editing +
Visual Aids

Visual Aids

- Why:
 - Clarify complex ideas
 - Break up text
- How:
 - Note points of confusion/complexity and ask team to draft
 - Draft figures yourself
 - Create tables to show how pieces are aligned/complementary

Writing +
Editing +
Visual Aids

Editing

- Why:
 - Ensure "one voice"
- How:
 - Ensure consistency in formatting, content
 - Ensure address FOA / review criteria
- Tip: Go back to style guide
- Tool: PerfectIt



Writing +
Editing +
Visual Aids

File Management

- Why:
 - Version control
- Tools:
 - Google docs, Box/Dropbox
- Tips:
 - Set expectations early
 - Demo for team in meeting
 - Provide a "cheat sheet"



Writing +
Editing +
Visual Aids

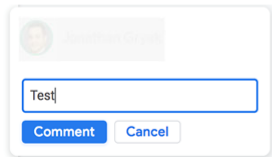
Google Docs Instructions Example

INSTRUCTIONS

1. Turn on "Suggesting" Mode to make edits. Click box at top right, "Editing"→ "Suggesting"



2. To insert a comment, click on "insert" menu bar and choose "comment". After you are done typing the comment you MUST hit "comment" button at the bottom of the comment, for others to see the comment... otherwise these comments aren't saved.



3. Multiple people CAN be editing at the same time

FINDING RESOURCES

To further support team & enhance likelihood of success

Strategic Resources

- Contact Program Officer
- Attend webinars if available
- Determine what else has been funded
- Determine if others have submitted previously
- Find successful examples
- Potentially seek cost sharing

Finding Resources



Other Useful Resources

- Money for:
 - Pilot grants
 - Writing Retreats
 - External Reviewers
- Money or staff support for:
 - Additional project management
 - Graphics support
 - Editing

Finding Resources



Summary

- Build those relationships
- It all comes back to the FOA
- Must be flexible
- Make this process work for YOU
- Questions?

