

Presenters:
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Research Development Services (RDS)

From Proposal Development to Project Implementation: Supporting Researchers in Start-up Project Management

OVERVIEW & PROBLEM STATEMENT

Proposal development services often end once the proposal has been submitted to the sponsor. If awarded, large complex proposals require rapid staffing which can be hampered by recruitment delays while finding and assessing qualified candidates. To mitigate the issue and provide highly-competitive proposals, UA is piloting a Project Management Start-up Program.



Utilizing Project Management practices during the proposal development process helps enable a smooth transition to funded projects, capturing institutional memory from proposal to full-time management. To complete the cycle, an RDS Associate may offer support of up to 3 months at 0.3 FTE to assist the PI in initiating the project.

TOOLS TO ENABLE PROPOSAL DEVELOPMENT

Utilizing new applications for proposal development and project management can assist with communications and document sharing across a distributed project team. In addition, these tools maintain the files and record of activities for the project's assigned manager.

Multiple new applications are available that are cloud based, secure (FERPA), synchronized with Microsoft Office & Google Docs, permit the embedding of video files and large files, and provide compatibility with multiple devices, and user restrictions.

"This is just a fancy version of email."

- skeptical project coordinator

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🗘 Account	? Help	Search		Q			
🔒 Home	💌 Agr	oecosystem	AFRI-004	915 × Basic Project with Gantt & Dependencies +			
		0 - <i>i</i>	At Risk	Task Name	End Date	Assigned To	Comments
5 6	68			Incorporate Changes/Finalize	05/26/15		
	69	<u></u>	4	Complete Narrative - Final	06/03/15		
	70	<u></u>	4	9 Bibliography and References Cited	05/01/15		To discuss
	71	<u></u>	P	10 Facilities and Other Resources	05/01/15		To discuss
≣ • = •	72	<u></u>	P	11 Equipment	05/01/15		To discuss
Arial	• 73		P	12 Other attachments	04/30/15		
10 + +	- 74		F	1. Key Personnel Roles – 2-Page Limit.			Optional; ask Michele
B I	75	<u></u>	4	2. Logic Model –2-Page Limit.	04/30/15	-	
<u>U</u> S	76	<u></u>	4	3. Management Plan - 3-Page limit	04/30/15	_	Aaron & Laura will discuss
🌯 - <u>A</u>	• 77		4	In the second	04/30/15	_	Letters of Support
	i 11/1/2 [4	Confirm LOS list	04/10/15	_	
	79		4	LOS template	04/13/15	_	
	80		4	George will call supporters	04/17/15	_	George will discuss adviso
P	81		4	Jenny will follow up with supporters	04/20/15	_	
f(x)	• 82	<u> </u>	4	LOS ready for signatures	04/30/15	_	
% 9	83		4	LOS final/attached to SF424	04/30/15	_	To discuss
+.0 .00 +.0	84		4	5. Preprints – Limited to 2		_	TBD: In press articles only
- J	85		4	6. Minority-Serving Institution Documentation			TBD; ask Michele about th
	86		4	Supplemental Information Form	04/27/15		
	87			Conflict of Interest List	04/27/15		

Capabilities:

- Schedule:
 Calendar & Gantt
 Charts (image 3)
- Version Control
 for Files
- Share Sheets, Rows, or Tasks
- Run Reports
- Set & Email Alerts
- Export to MS
 Excel or Project
 (image 4)

InfoReady Review

Capabilities:

- "One stop shop" for internal competitions (including Limited Solicitations)
- Multiple routing (review) steps
- Competition Categories
- Flexible application form (template)
- Limited or unlimited applicants (e.g. University-wide or Department-specific)

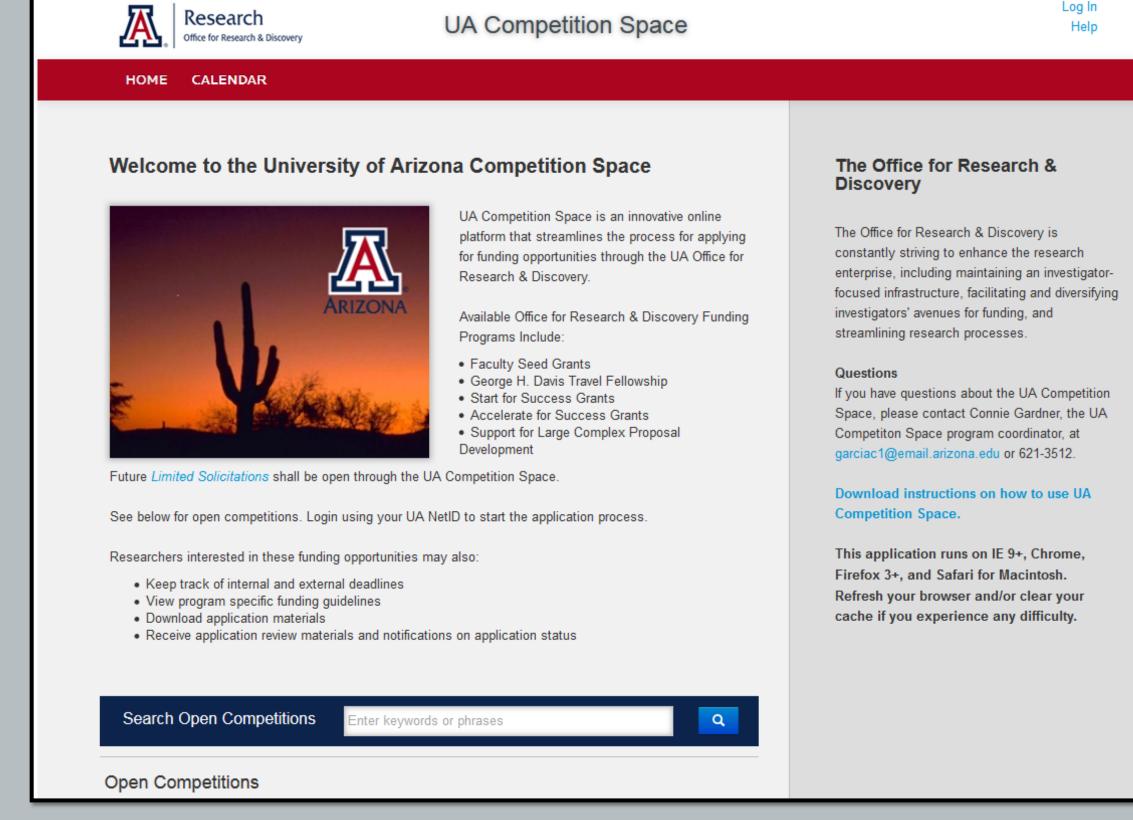


Image 1: UA's InfoReady Review Homepage

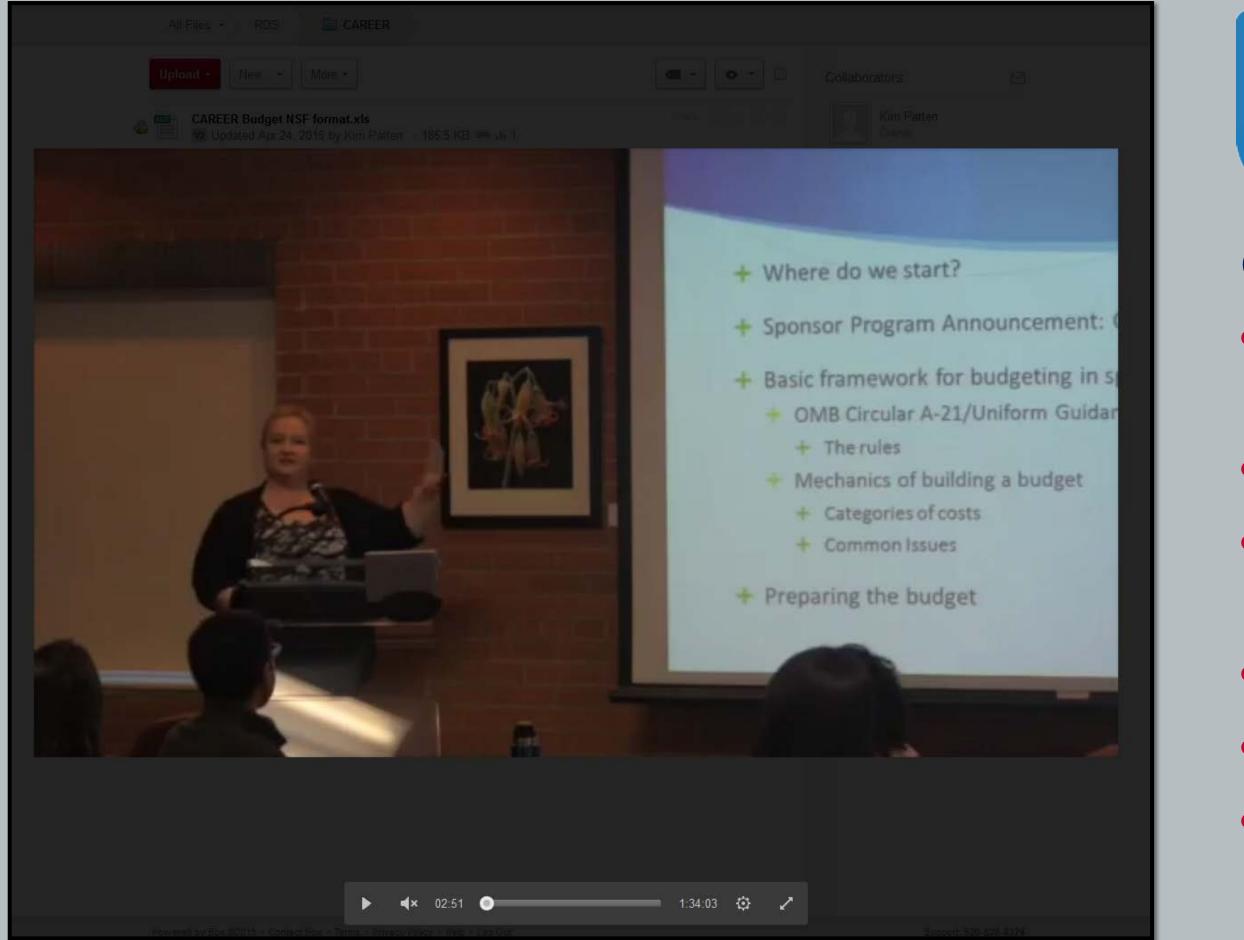




Image 3: smartsheet's online project planning tool

"I was able to set reminders for all upcoming deadlines in smartsheet – thanks so much for all your help with this!!"

- converted project coordinator

At Risk	Task Name	End Date	Assigned To	Comments
	Team Meetings	06/02/15		
	All Team	05/13/15		
	All Team #1 (Kick-off, Proj Design)	03/16/15		
	All Team #2 (Lead Presentations)	04/07/15		8:30-10:30 PM
	All Team #3 (Discuss Ext. Review Comments)	05/13/15		
	Standing Mtgs	06/02/15		Tuesdays 9-10 AM
	SmartSheet Set Up	04/07/15	M	
	Graphics - Meeting 1	04/06/15	R	R 2:30 PM
	All Graphics	05/01/15		
	Submission Deadlines	06/04/15		
	SF424 - Completed	06/03/15	J	
	SF424 - PI Final Review	06/03/15	L	
	SPS: UA Routing	06/04/15	D	
	Grant Package (SF424)	06/03/15		
	R&R Budget	04/30/15		
	Budget - Internal draft	04/10/15	L	
	Budget Justification - Draft	04/24/15	D	
	Budget Justification - Send to Co-Pls	04/24/15	L	
	Budget Justification - Comments back to JN	04/28/15	J	
	Budget Justification - PD Final Approval	04/30/15	L	
	R&R Budget - Completed Form	04/28/15	D	
	R&R Key Personnel (KP)	05/01/15	J	
	R&R Other Project Info	06/03/15		
	7 Project Summary/Abstract	04/27/15	L	Req'd Form; 250 words
	8 Project Narrative	06/03/15		
	Section Drafts	04/29/15		
	Range Ecosystem Services	04/20/15	G	
	NEPA Process	04/20/15	M	
	Ranch Budgets	04/20/15	Т	
	Regional Economic Analysis	04/20/15	A2	

Image 4: Export of the smartsheet online tool to MS Excel

"...our collaborator was really impressed with how organized we were."

Image 2: UA's Box, demonstrating the UA CAREER workshop video on budgeting

Capabilities:

- Secure file sharing (encryption)
- Videos (Image 2)
- Version control & history
- Editing
- Task assignments
 Mobile apps
- Mobile apps



THE UNIVERSITY OF ARIZONA "Love it! Thanks for setting this up!" and "The grant is on track!" (after a week traveling)

- Happy Principal Investigator

Questions? Email: kjpatten@email.Arizona.edu