Measuring Proposal Needs and Allocating Sufficient Research Support

UNIVERSITY of WEST FLORIDA

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Problem/Question

How can proposal developers best allocate their time to each proposal under development? Proposal developers are often faced with the responsibility of juggling multiple projects with multiple individuals. The ability for proposal developers to provide realistic service deliverables is paramount to reducing frustration and improving success.

Hypothesis

Intake procedures, upfront responsibility assignments, and project management software provides a system that creates quantifiable time blocks. These quantifiable time blocks are then appropriately scheduled to meet grant deadlines and produce high quality proposals.

Project Overview

Quantifying the estimated time for each task creates scheduled time blocks. This scheduling technique allows proposal developers and researchers to set realistic schedules and meet proposal deadlines. The University of West Florida (UWF) is establishing a proposal planning system by implementing the following procedures:

1) Kickoff Meeting and Initial Intake Responsibility Checklist
2) Master Proposal Checklist with Responsibility Assignments
3) Calendar Time Blocking
4) Kanban Project Management Software

Estimated proposal development time:
## 50 to 120 Hours

Kickoff Meeting and Initial Intake Responsibility Checklist: The kickoff meeting and intake checklist prevents last-minute requests for proposal development services and confusion over task assignments. The proposal intake checklist ensures that each member of the project is aware of their responsibility in the proposal development process. The checklist also allows the research office to allocate sufficient staff time to meet the requested proposal development services. During the kickoff meeting, the proposal developer and research team inventory the proposal needs and the required elements specific to the proposal. At this time, the research team decides who is responsible for each task and documents this information on the intake responsibility checklist.
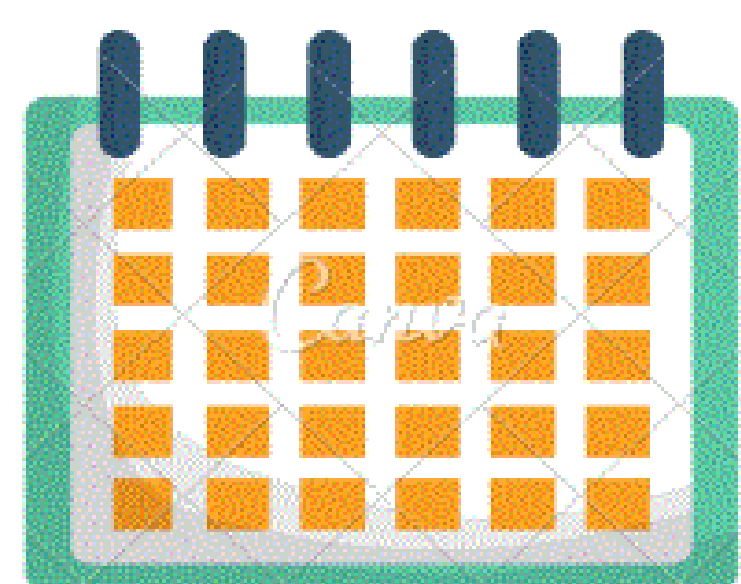
Master Proposal Checklist with Responsibility Assignments: After the kickoff meeting, the proposal developer transfers the intake checklist to a master proposal checklist. The proposal developer also indicates the estimated time needed for each task and documents this information on the master proposal checklist. This checklist identifies the person responsible and the due date of each deliverable. The master proposal checklist is emailed to each project team member for documentation.

Calendar Time Blocking: Using a shared calendar, such as Google or Outlook, each team member blocks sufficient time to complete each task on their calendars. Project members allocate time based on the assigned task due dates and the overall proposal deadline.
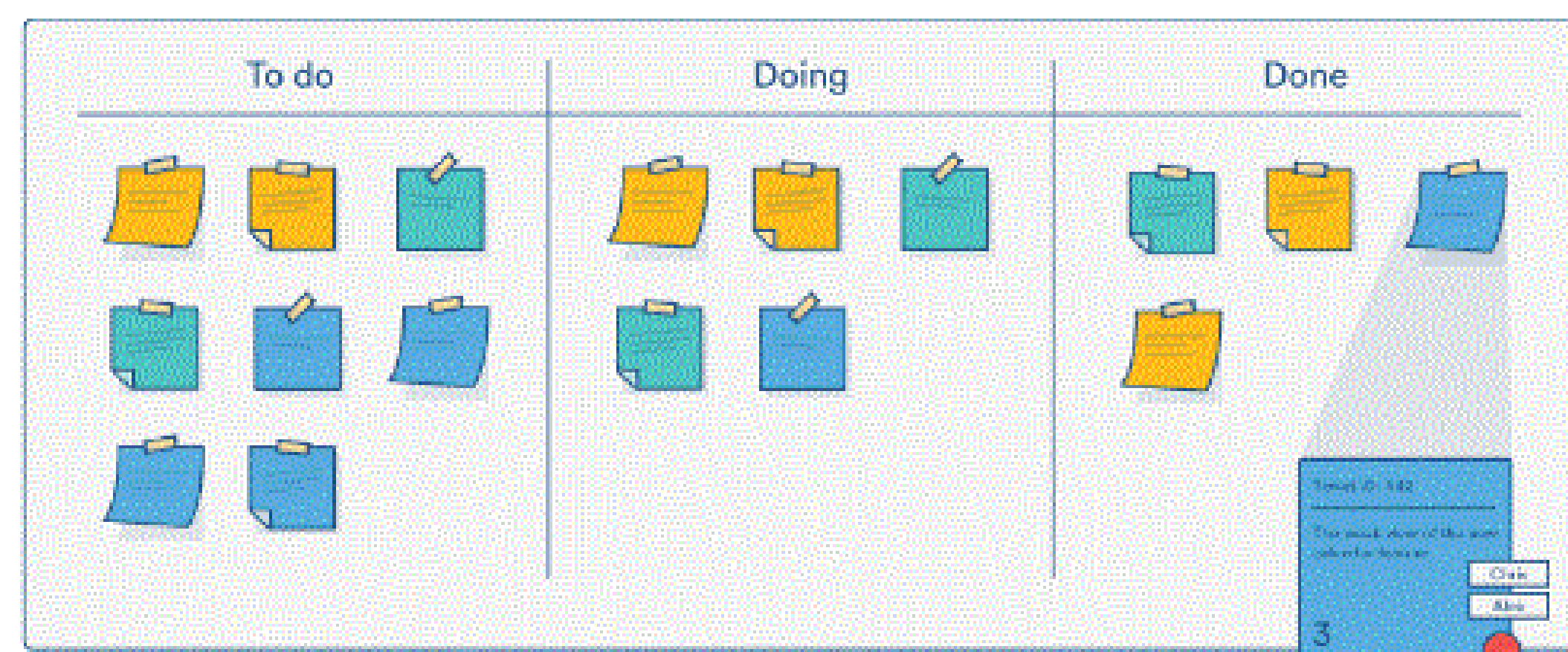
Kanban Project Management Software: The adoption of the Kanban Method and an agile project management software system allows for the project team to effectively communicate and share documents related to each task. UWF is currently using the JIRA project management ticketing software system. In JIRA, each proposal task is assigned a ticket with a due date and the estimated time needed for completion. Similar systems include Trello, TeamWork, and Asana.

A key component of agile systems is to evolve solutions through a collaborative effort. Additionally, this system increases the pace of solutions and easily tracks progress to completion. The entire research office work capacity can be viewed and assessed so that a research staff member and/or supervisor can easily determine his/her capacity to take on new proposals.

For more information about UWF's Proposal Development Structure, please contact Senior Grant Specialist, Monica Vandenberg at mvandenberg@uwf.edu