



Grant Writing: Terminology and Grant-Preparation Workflow

TechWrite STL Luncheon

Tuesday, May 16

Presented by Patrick Dorsey and Veronika Redmann

Luncheon Presentation

- ▶ 1. Learn about terminology around grant/RFP-writing
- ▶ 2. Learn about the typical workflow and tasks of a technical writer working on a grant/RFP

Clients

▶ Grants (grant or contract-based opportunities)

- ▶ Grant opportunities issued by: 1) government entities or 2) non government entities, such as non-profits/philanthropic organizations to support research and development, commercialization of a product or service,
- ▶ Writers can be hired by many in-direct or direct beneficiaries from funding of potential grant: Universities, Academic departments, Office of Technology Management, Students and Faculty, Start-up founders and Inventors, Established Small Business Owners, Investors, Business Incubators, and State and Privately–Supported Economic Development Organizations

▶ RFPs (Request for Proposals)

- ▶ Typically, RFPs are issued by government entities seeking a vendor for a product or service.
- ▶ Writers are usually hired by vendors to help write the proposal to win the business described in the RFP

Grant vs. RFP

▶ Grant

- ▶ It's a solicitation your client or beneficiary of your client wants to answer to win funding to support R&D or business
- ▶ Relevant to Individuals or Entities in Academia or Industry (defined in opportunity)
- ▶ Reactive or proactive, Client can choose what they need and what is best fit for the research/product or service they are looking to support with a grant (defined by opportunity and federal agency or non-profit supporting it)

Grant vs. RFP

- ▶ RFP
- ▶ It's a solicitation your client wants to answer to win business
- ▶ Usually for government
- ▶ Reactive, unless you or the client is out gathering intelligence



Preparation

- ▶ Preparation of Proposals
- ▶ Writing
- ▶ Formatting
- ▶ References
- ▶ Figures and tables (Veronika and Patrick)
- ▶ Need your SMEs!
- ▶ Database Registrations and Grant Submissions (Patrick and Veronika both)
- ▶ Team-Building for grant project team, Letters of Support, Grant Project Budget Advising (Veronika)
- ▶ Pre- and Post-Grant Preparation Support Steps: Interactions with Federal Program Officers, Grant Application Review Critique Discussions, Resubmissions and Project Reports (Veronika)

Typical Project Timeline and Tasks

▶ Timeline- Grants

- ▶ Registrations for databases required for submission (not relevant to all clients, can take several months to finish)
- ▶ Initial Submission for Pitches, Letters of Intent (if relevant, screening step first for invite for later full application/proposal submission for final deadline)
- ▶ Submission Deadline defined by funding opportunity (typically for federal grants 1-6 months in advance)
- ▶ Most applications/proposals take 2-6 months of preparation (hearing back on review/funding results within 5-8 months, may result in resubmission)

▶ Timeline- RFPs

- ▶ For RFPs, there's no typical timeline
- ▶ One week turnarounds on small state RFPs
- ▶ Ten week out due dates on big Medicaid RFPs
- ▶ *You always have to be ready to telescope your to-do list*

Tasks (Grants- Veronika)

▶ Prep

- ▶ **Define your roles as the technical writer** for the proposed project with contract
- ▶ **Do your homework** to understand funding opportunity formatting, eligibility requirements and timeline (interaction or attendance at workshops/events with federal agency or non-profit to confirm eligibility)
- ▶ Discussion with Client to make sure they are good fit for opportunity or whether they should search for others
- ▶ Read materials from Client and/or literature databases (about current state of research completed) to make sure you agree they are good fit for opportunity
- ▶ Discuss Registrations/Prep Timeline and Deadline with Client to ensure they can meet it or agree to risk they may not make it if rushed

▶ ▶ Write

- ▶ **Work to understand subject matter/lingo and proposed project you are describing in grant application/proposal**
- ▶ Define workflow and calendar with client to ensure clear communication on expectations
- ▶ Agree to list of documents to prepare and submit (the technical writer vs. the client, any outside entities)
- ▶ Write, edit, prepare figures and format documents and references

Tasks (Grants cont'd- Veronika)

- ▶ **Non-Writing Steps** (all at technical writer's comfort level and training background, may want to find your client referrals for these steps)
- ▶ **Helping Client navigate learning more about opportunities/project fit for federal agency/non-profit**
- ▶ **Meeting non-writing requirements of project planning:** team composition and collaboration planning, scientific R&D plan, grant budget advising, business planning, administrative grant project reporting (financial and/or technical reports)
- ▶ **Navigating Client Not Getting Funded:** Discussions of Review Critiques and Resubmissions to Same Opportunity or Adapting Same Project/Application to different opportunity

Tasks (RFP- Patrick)

▶ Prep

- ▶ Do your homework to understand RFP questions
- ▶ Define your audience and your message, especially the win theme
- ▶ Read the RFP - all of it
- ▶ Break down the questions, create a list of points to address

▶ ▶ Write

- ▶ Write a clear response that answers the RFP question
- ▶ Use all the points you identified—*in order*— to create an outline for your response (reviewers often follow checklist for scoring)
- ▶ Use subheads to guide the reviewer through your response
- ▶ Use narrative, lists and pictures

Tasks (RFP- Patrick)

- ▶ Write (cont'd)
- ▶ Back up what you say with specifics
- ▶ Stick to the question - like testifying in court
- ▶ Use the 1/3 rule for optimum page layouts
- ▶ Text, graphics, white space



Tasks (RFP-Patrick)

▶ Edit

- ▶ Review the response you wrote to ensure it answers the RFP question completely and concisely
- ▶ Review your completed response
- ▶ Review any Q&A documents and other amendments issued by the state
- ▶ Change your response appropriately, based on the state's updates
- ▶ Have someone else review your completed response

Thank you!

▶ Questions?

