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?