GP PROPOSAL WRITING WORKSHOP

November 8, 2017
Part 1: Proposal Writing Tips
- Benefits of designing your own proposal
- Successful proposal criteria
- Review the RFP + timeline
- Top three tips
- Proposal elements
- Working with a client
- How to get started

Part 2: Review Past Proposals

Part 3: Idea Workshop
PROPOSAL WRITING TIPS
BENEFITS OF DEVELOPING YOUR OWN GP

- Gain valuable experience proposal writing
  - Follow-up and obtain feedback – successful & unsuccessful
- Control your GP destiny!
  - Two student authors guaranteed group membership if selected
- Networking and building relationships
SUCCESSFUL PROPOSAL CRITERIA

- Identify and solve a clear, significant environmental problem
- Multidisciplinary in nature
- Incorporate science and management
- Use existing data
- Have an appropriate scope
  - Your team has the expertise & ability
  - Practical logistics
    - Workload = 1 FTE equivalent divided among team members
    - It’s clear you can finish in 9 mos.
- Anticipates & meets financial needs

PROPOSAL = internally consistent
PROJECT = realistic & significant
RFP + TIMELINE

- RFP posted online: http://www.bren.ucsb.edu/research/masters_gp.htm
- Proposals due January 26, 2018 @ 5:00pm
  Submit via email: projects@bren.ucsb.edu
  - Due ~11 weeks from today
  - But take note:
    - Your break is Dec 16 – Jan 7
    - Your clients won’t be readily available over the holidays
- Format: 3 pages + supplemental docs
- Submissions reviewed Winter Quarter
  - Committee: 3 faculty + 3 students
  - ~17 total GPs selected (out of ~40-50)
You can serve on the GP proposal review committee!
- 3 students are elected to site on this committee
- You can write a proposal AND sit on the committee
提案元素

主要提案（3页）
- 标题页
- 目标
- 重要性
- 背景
- 可用数据
- 可能的方案
- 交付物
- 实习生

支持文件
- 引用
- 预算与合理化（1300美元）
- 客户支持信（实习、资金、数据）
1. **DATA.**
   - Is the problem rooted in existing data?
   - Is data readily available?
   - Is data appropriate for your problem?
   - NO excessive field work or survey collection!
   - Make sure your project doesn’t require data collection to be successful (secondary data is best!)

2. **PLANS MUST BE FINALIZED.**
   - Deliver a concrete timeline.
   - If you’re unsure about plans, *indicate when you’ll know.*

3. **FACULTY ADVISOR @ BREN.**
   - You will have more support in the long term if you have a faculty member behind your project.

*Casey says: Pay attention to these tips!*
Title: describe science and management problem you’ll solve

Proposal authors: (email, phone, affiliation)
- May be clients, faculty, students
- Only list those who actively developed / wrote the proposal
- NOTE: there can only be TWO primary student authors (with guaranteed membership in the group)

Client information (name, email, phone, affiliation)
- List the primary point of contact for the organization
What are the science and policy or management questions that need to be answered by the project? Focus on 1-3 concrete & achievable objectives.

- Propose “SMART” objectives
  - Specific, Measurable, Actionable, Relevant, Time-based
- Be clear and concise
  - If multiple objectives, consider bullets or numbering
- Everything in the proposal needs to be linked back to these objectives
- Consider timeframe and resources
- Common mistake – objectives are too broad
“What is the context for this work? Why is it important? Who is the target audience/client? Which other people (besides the client) would benefit from the results of this work?”

- Use “Problem/Solution” framing

  *(This is your “problem statement”)*

  - What is the problem? (why is it a problem? Use strong evidence)
  - Where have other approaches failed? (if applicable)
  - What are the implications of this problem and solution?
  - Generally explain context, importance, target audience, beneficiaries
“Where is the project location? In general, how did the problem arise? What has been done to date, if known?”

- Provide project context, briefly
  - Where is the project happening?
  - What organizations/stakeholders are involved?
  - Explain the history: how has the issue evolved over time?
  - Is anyone else working in this problem space?
  - Be concise! Too much background will weigh down the proposal.
“What data are available to address this problem? How and when can the students acquire the data for their analysis?”

- **Describe available data**
  - Be specific about what is in the data
  - Link data to objectives (discuss with a faculty member)

- **When & when data will be acquired.**
  - Needs to exist and be accessible (be realistic – err on the side of caution)
  - Best to have data upfront
  - Some data collection okay, just not bulk of project
  - If client is providing data, this must be described in a Client Letter of Support
“What data are available to address this problem? How and when can the students acquire the data for their analysis?”

- **Confidential data.**
  - Confidential data does not disqualify project
  - Non-Disclosure agreements (NDAs) can be tricky for UCSB (students need to own intellectual property)
    - Talk to Casey if this comes up with your client!
POSSIBLE APPROACHES

“Briefly describe likely approaches that may be used to address the project objectives. One task for the students in a group project is to more fully develop the approaches that will best meet the project objectives, but suggestions from the client are extremely useful in focusing early work.”

- Describe likely approaches to address project objectives
  - These approaches are not guaranteed to be used
- The full GP team will develop the project approaches (spring quarter)
Deliverables

- The specific products/recommendations generated from the project
- Mandatory:
  - Final written report, policy brief, oral public presentation
- Optional
  - Website, tool, model, client presentation, etc.
  - Discuss with client to find out their expectations

Deliverables will be publicly available

- The product cannot be exclusive (example)
- Make sure client knows this from the beginning
- One paid internship is required
  - More than one internship can be offered
  - Must be described in the letter of support
  - Funding can come from client or alternate funding source
  - A client designated place to work is preferable, although not required
Citations
- Include citations, particularly for background & significance

Budget + budget justification
- You determine how to allocate $1,300 (only accessible by students)
- Budget in the proposal is for additional client funding
  - Provide budget (personnel, supplies, travel)
  - Describe anticipated costs
  - Best option: to have client pay for other expenses directly
    - Alternatives: grant proposal or gift to Bren
    - Both have an overhead cost that the client must pay (UCSB current indirect cost rate – 53%)

Client letter of support
- Internships
- Funding
- Data
WORKING WITH A CLIENT

- Client Considerations
  - expected to dedicate ~1 hour per week to GP throughout the entire project period
- Client – GP relationship is collaborative, less client/service
- Students are advisors to client, not employees
- Seek stable organizations as clients
  - Project should not hinge upon one person (turnover may occur)
1. INCORPORATE EXISTING DATA.
2. PLANS MUST BE FINALIZED.
3. FACULTY ADVISOR @ BREN.

Casey says: Pay attention to these tips!
QUESTIONS?
HOW TO GET STARTED

- **Prepare.**
  - Carefully read the Request for Proposals (RFP)
  - Read 3+ successful proposals from last year
    - Note strengths and areas for improvement
  - Identify a past proposal to use for guidance
  - Identify a reliable GP client

- **Outline your proposal elements.**
  - What is the GOAL of your project? / What will you achieve?
  - What research questions will you ask?
  - What deliverables will you create?
  - What existing data will you use?

- **Write up a proposal timeline.**
  - What will you accomplish this spring, summer, fall?
  - When will you collect data?
  - When will you analyze data?
  - Project dates: April 2018 – April 2019
EXAMPLE TIMELINE

PROJECT TIMELINE

Project Length: 14 months (Aug 1 2016 - Sept 30 2017)

2016

Aug  1

Sept  2

Oct  3

Nov  4

Dec  5

Jan  6

Feb  7

Mar  8

Apr  9

May  10

Jun  11

Jul  12

Aug  13

Sept  14

Prepare for WG 1

Working Group 1 (Oct 27 & 28)

Finalize research strategy and design (by Dec 1)

Memo on research strategy & design (due Dec 20)

Data collection (Jan 1 - Jun 16 2017)

Prepare for WG 2

Working Group 2 (Apr ??)

Write report

Status Report: Data-analysis & strategy follow-up
HOW TO GET STARTED

- **Costs:** how will you use $1,300?
  - Will you need more money?
  - Will your client provide more resources?

- **Write up a proposal checklist.**
  - Assign roles
  - Set deadlines
  - Have a final proposal editor

### Project Proposal Checklist

<table>
<thead>
<tr>
<th>Proposal Elements</th>
<th>Key Proposal Objectives</th>
<th>Response</th>
</tr>
</thead>
<tbody>
<tr>
<td>Proposal Background</td>
<td>Have we effectively documented our understanding of the prospect’s situation?</td>
<td></td>
</tr>
<tr>
<td>Market Environment</td>
<td>Have we appropriately described the current and future market trends and directions in the prospect’s market?</td>
<td></td>
</tr>
<tr>
<td>Objectives</td>
<td>Did we clearly document the prospect’s specific objectives?</td>
<td></td>
</tr>
<tr>
<td>Project Scope &amp; Approach</td>
<td>Have we confirmed the scope of our proposed work? Have we outlined a “customized” version of the Project Management Methodology for the planned project?</td>
<td></td>
</tr>
<tr>
<td>Key Deliverables</td>
<td>Have we outlined the key deliverables that will be developed or acquired in the project?</td>
<td></td>
</tr>
<tr>
<td>Professional Resources</td>
<td>Have we accurately determined the skill requirements for project success?</td>
<td></td>
</tr>
<tr>
<td>Project Benefits</td>
<td>Have we identified the value that will be derived by the prospect’s quantitative and qualitative benefits resulting from a successful project?</td>
<td></td>
</tr>
<tr>
<td>Fees &amp; Expenses</td>
<td>Have we accurately estimated our professional fees, out-of-pocket expenses and payment terms?</td>
<td></td>
</tr>
<tr>
<td>Terms / Conditions</td>
<td>Have we accurately described standard business / project terms and conditions?</td>
<td></td>
</tr>
</tbody>
</table>
EXAMPLE PROPOSALS

PART 2
FOR THE PROPOSAL, CONSIDER...

- How did the authors FRAME THE PROBLEM?
- What are the successful PROGRAM ELEMENTS?
- What DATA will the group use?
- What are the final deliverables?
IDEA WORKSHOP

PART 3
WHAT ARE YOU CONSIDERING?

- Issue?
- Problem you’re solving?
- What are your objectives?
- Who will you work with?
- What data are you considering?
Questions? Contact:
- Lisa Leombruni: lisa@bren.ucsb.edu
- Casey Hankey: casey@bren.ucsb.edu

THANK YOU!