

Bren Group Project Proposal Writing Workshop

INSTRUCTED BY:

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Introduction

Joshua M. Simmons (Class of 2008)

- **Founding President of Prosper Sustainably**
 - Assisting communities and organizations development and implement lasting solutions to meet environmental and sustainability needs
 - Grant Writing / Management, Program Development, Plans & Assessments
 - Project Management, Environmental Codes Drafting, Feasibility Studies
- **Former SYCEO Director (2007 – 2014)**
 - Transformed the Santa Ynez Chumash Environmental Office (SYCEO) into a nation-leading tribal environmental agency
 - Secured 42 grants for \$4.3 million in funding
- **Grant Writing Course Instructor**
 - Instructed on behalf of FWS, USBR, and UCSB
- **Bren Group Project Experience**
 - Student Proposer; Client Proposer
 - GP Team Leader/Participant; Client



Workshop Objectives

- Understand GP proposal RFP sections, components, and requirements
- Learn and discuss strategies to address each section, component, and requirement
- Provide feedback on draft proposals, proposal ideas, and possible approaches
- Answer RFP and proposal questions that arise before or during the workshop
- **Prepare students to prepare a high quality and competitive Group Project Proposal**

Workshop Agenda

- **How to Maximize the Bren Group Project Experience**
- **First Steps - What To Do Before You Start Writing**
- **Proposal Elements - Description and Strategy**
- **Additional Proposal Strategies & Considerations**
- **Obtaining and Working with the GP Client**
- **Understanding the Group Project Selection Process**
- **Discuss Proposal Ideas, Drafts, Possible Approaches**
- **Review Successful 2015 Group Project Proposal (optional)**
- **Answer Remaining GP Proposal Questions**

Maximizing GP Experience

- **Gain Valuable Experience Preparing a Project Proposal**
- **Opportunity to Control Your Own GP Destiny**
- **Serve on GP Proposal Review Committee**
 - 3 students are elected to sit on this committee
 - A student can write a proposal and sit on the committee
- **Networking and Building Relationships**
 - Potential external clients, Bren faculty and students
 - Example – A failed GP proposal leading to a successful job opportunity
- **FOLLOW UP and Obtain Feedback**
 - For both successful and unsuccessful proposals

First Steps – Before Writing

- Attend this Workshop
- Read and Review the Request for Proposals (RFP)
 - Template Review Document available
- Read 3+ Successful Proposals from Last Year
 - Note strengths and areas for improvement
- Identify a Group Project Idea/Topic
- Find a Past Proposal to Use for Guidance
- Identify a Reliable GP Client
- Contact Casey Hankey, GP Coordinator for Initial Guidance
- Meet with Satie & Casey to Discuss a Clearly Defined Topic
- Prepare a Proposal Strategy Checklist
 - Template Excel Checklist available

RFP Review

Objectives & Desirable Attributes

OBJECTIVES:

- **Multidisciplinary Environmental Problem Solving Experience**
 - Science with some application (business, policy, management, etc.)
- **Project, Time & Financial Mgmt; Teamwork; Leadership; Organizing & Presenting Data; Stakeholder Communication**

DESIRABLE GP ATTRIBUTES:

- **Conducive Environment**
- **Trust, Collaboration, Rapport**
- **Appropriate Client Involvement**
- **Open & Professional Communication**
- **Appropriate Topic and Client**
- **Realistic Scope of Work**

Proposal Elements

- **Title – Review Past Proposals for Examples**
- **Proposer(s) Contact Information – Students, Clients, Faculty**
 - **Only list participants that actively wrote or edited the proposal**
 - Consulting with a faculty member does not make them a co-author
 - **Only 2 students can be primary authors → guaranteed membership in group if the proposal is selected**
 - Additional students can listed as non-primary authors
 - **Faculty co-author does not guarantee project selection**
- **Client(s) Contact Information**
 - **Main Point of Contact for students**
 - **The project must have a client**

Proposal Elements

OBJECTIVES

- Propose 1-3 SMART Objectives
- Be Clear and Concise
 - If multiple objectives, consider bullets or numbering
- Everything Else in Proposal Needs to Link to Objectives
- Consider Available Timeframe and Resources
- Common Mistake – Objectives are Too Broad (example)
- Examples:
 - http://www.bren.ucsb.edu/research/documents/32_TomDudley_InvasiveGiantReedControl.pdf
 - http://www.bren.ucsb.edu/research/documents/24_NOAASBCAPCD_SBChannelTradeoffs.pdf
 - <http://www.bren.ucsb.edu/research/documents/sbwater.pdf>

Proposal Elements

SIGNIFICANCE

- **Explain Context, Importance, Target Audience, Beneficiaries**

BACKGROUND

- **Where, Problem Evolution, Efforts to Date**

- **Be Concise (if not obvious, more justification may be needed)**

Proposal Elements

AVAILABLE DATA

➤ Describe Available Data

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

➤ How & When Data Can 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 as bulk of project
- If client is providing data, this must be described in a Client Letter of Support

➤ Confidential Data

- Disclose in proposal – confidential data does not disqualify project
- Non-Disclosure Agreements (NDAs) can be tricky for UCSB
 - Students need to own intellectual property

Proposal Elements

POSSIBLE APPROACHES

- **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 Qtr)
- **Client Input is Valuable but Not Prescriptive**
 - It is important that the client understand this from the beginning

Proposal Elements

DELIVERABLES

- **The Specific Products From the Project**
- **Mandatory:**
 - **Final Written Report, Policy Brief, Poster, Oral Public Presentation**
- **Optional:**
 - **Website, Tool, Model, Client Presentation, etc.**
 - **Discuss with client and find out their expectations**
- **Deliverables Will Be Publicly Available**
 - **The product cannot be exclusive (example)**
 - **Make sure client knows this from the beginning**

Proposal Elements

INTERNSHIPS

- **Client Offered Internships – Yes/No; How Many?**
 - Almost all projects now offer internships
 - More than one internship can be offered
 - Paid internships are preferable, although not required
 - A client designated place to work is preferable, although not required
- **To Further Goals of Project & Develop Professional Skills**
 - Student mentoring should be available throughout internship
- **Client Letter of Support Must Describe More Fully**
 - This demonstrates client commitment to the internship(s)
 - Discuss all this with client before submitting proposal



Proposal Elements

CITATIONS

- **Include Citations, Especially for Background & Significance**
 - Additional credibility for the problem and what has been done
 - This is especially important if it is not a common problem
- **Don't Go Crazy**
 - Reviewers will want to limit how much outside information they need to consult to understand the proposed project

Proposal Elements

BUDGET AND JUSTIFICATION

- **\$1,300 From Bren School**
 - GP Team will determine how to allocate (only accessible by students)
 - A budget for this does not need to be included in the proposal
- **Additional Client Funding (if necessary)**
 - **Provide budget (sample table)**
 - Personnel (e.g. for an internship), Supplies, Travel, etc.
 - **Describe anticipated costs**
 - **Best 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%

Proposal Elements

CLIENT LETTER OF SUPPORT

- **If Client Will Provide Data, Additional Funding, Internships**
- **Data: Type, Content, Availability**
 - If NDA required, data constraints need to be described
 - Unrestricted data is preferable (no NDA or publication restrictions)
- **Funding: Amount, For What**
 - Best to have client pay for other expenses directly
 - Alternatives: Grant (w/ faculty PI) or Gift to Bren
 - ❖ Both have an overhead cost that the client must pay
 - UCSB IDC - 53%; Bren Gift IDC – 6%
- **Internship(s): How Many; Timeframe; Location; Paid/Unpaid**
 - Describe how internship will meet GP objectives, develop professional skills, provide student mentoring
 - Discuss requirements and preferences with client beforehand

Requirements & Limitations

- **Due Date: January 22, 2016 by 5pm**
 - Submit via email to projects@bren.ucsb.edu
- **3 Page Limits – Proposed Project**
- **No Page Limit – Supporting Materials**
- **Limited Intellectual Property (IP) License**
 - Bren can use client logo in connection with GP
 - GP deliverables containing client logo and IP on website, etc.

Client Considerations

- **Client Needs to Be Available**
 - Expected to dedicate ~1 hr/wk to GP throughout entire project period
- **Client-GP Team Relationship = Collaborators**
 - Students lead the project and decide where it will go
 - Students are advisors to client, not employees
- **Fully Understand the Client's Goals and Objectives**
 - Best if they do not have a fixed goal, objective, or motive/agenda
 - The project may produce unexpected or unfavorable outcomes/findings
- **If Multiple Clients, Best to Have One Primary Client**

Client Considerations

- **Seek Stable Organizations as Clients**
 - Project should not hinge upon one person (turnover may occur)
 - Project should also not rely upon one student
- **Cannot Repeat a Project**
- **Discuss and Be Clear About Expectations Upfront**
 - Continue to communicate and reinforce throughout project

Criteria & Selection Process

- GP Committee – 3 Faculty & 3 Students
- ~17 Projects Expected (out of ~40-50 proposals)
- Criteria:
 - Significant Environmental Problem → Requires Solution
 - Clear Science and Policy/Management Questions
 - Interests, Expertise, and Capabilities of Students & Faculty
 - Feasible Project Scope – Student Experience and Availability
 - Workload = 1 Full Time Employee (FTE) equivalent divided among team members
 - Practical Logistics (consider location, timing, data availability, etc.)
 - Anticipated Financial Needs
- Review Proposal Using Criteria (periodically)

Additional Considerations

- **Others May Be Considering Proposing Similar Projects**
 - Seek to collaborate on one proposal or distinguish your proposal
 - Similar projects will not be selected
- **Your Proposal May Not Get Selected (examples)**
 - Seek feedback either way
- **A Good Proposal May Not Get Selected**
 - The profile of selected projects depends on student focuses/interests
 - Selected proposals can be dropped due to lack of interest
 - Communicate this to the client upfront
- **Popular Areas of Interest Can Be More Competitive**

Ideas, Drafts, Possible Approaches

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Thank You!
Questions?

