



SRA INTERNATIONAL
ANNUAL MEETING
CHICAGO 2024
OCTOBER 26-30

T 404: Pros and Cons of Using Consultants to Develop Grant Proposals

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Learning Objectives-Revised

- Original: Articulate ways in which external grant writers/research development consultants can help institutions with challenging grant proposals
 - Revised: We have no idea how to get out of this mess
 - Revised: Help! We need miracle workers now
 - Recognize advantages and limitations of external grant consultants
 - Revised: your fee is how much? For the project? Oh, for each day? Oh, for each hour? And only weekdays from 10-3?
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Your presenter: Marjorie Piechowski

- SRAI Distinguished Faculty
- SRAI Past President
- Over 35 years of experience in research administration at three US universities in
 - proposal development
 - faculty workshops
 - mentoring faculty in grantsmanship, especially new faculty
 - organizing and writing large-scale, complex proposals
 - publicizing/recognizing research success
 - providing pre-award services
 - overseeing institutional research compliance
 - managing post-award oversight

- now, independent grant development consultant for colleges, universities and research institutions in the U.S. and globally
- Passionate advocate for research development and capacity building for investigators and institutions



Why consultants? Why now?

- 🔗 A passing phenomenon? A new paradigm?
 - 🔗 What are the types and expertise of consulting firms? How do you find them?
 - 🔗 Is it realistic to have internal specialists for complex proposals? Will consultants become the new normal in research administration?
 - 🔗 Will less-resourced institutions be unable to compete in this funding environment?
 - 🔗 What about conflicts of interest/conflicts of commitment for consultants working at multiple organizations?
 - 🔗 Your thoughts on the topic? Your experiences?
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Practical Advice in Working with Consultants: Selection

- 🔗 Vet your consulting firm to ensure a good fit with your institution and people (technically and personally).
 - ✿ Will you be working with one designated person from the consulting firm throughout the project?
 - ✿ You will be working with the consultant(s) intimately and for an extended period of time, perhaps under pressure.
 - ✿ Lack of synergy and personality conflicts can derail the project and the consulting relationship. The end goal is a successful project and a good client/consultant team.
 - ✿ What is the consultant's history, track record, success rate with this type of project?
 - ✿ Should the consultant submit writing samples? References?
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Practical Advice in Working with Consultants

- ❧ Set expectations early: no one wants surprises
 - ❧ Understand and clearly define roles, responsibilities and timelines early and in writing for proposal development.
 - ❧ Who is responsible for what proposal components or other tasks?
 - ❧ Ensure that everyone knows their role and scope creep is minimized.
 - ❧ Contract, scope of work, cost—all mutually decided, written and signed

 - ❧ Communicate, communicate, communicate
 - ❧ Establish regular mandatory meetings: status updates, areas that need attention, delays and challenges.
 - ❧ Ensure that all internal and external stakeholders are informed and committed to the project.
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Practical Advice in Working with Consultants: Process

- 🔗 Writing a proposal: who does what?
 - 🔗 Checklists, templates, other tools to complete the proposal/tasks
 - 🔗 Are these proprietary and developed by the consultant? Internal to the institution?

 - 🔗 Scary anecdotes
 - 🔗 Title III evaluation section produced by consultants
 - 🔗 Budget changes by university president (unallowable in this federal grant)
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Practical Advice in Working with Consultants: Decisions

- 🔗 Who is the decider in chief, to use American political slang?
 - 🔗 Changes in leadership during the proposal development/project: no one in charge, all interim inexperienced leaders, afraid and unwilling to decide
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Challenges with Massive, Complex Proposals

- ⌘ Establishing focus and scope
 - ⌘ Advising on time/budget allocations
 - ⌘ Arbitrating competing interests
 - ⌘ Managing egos
 - ⌘ Identifying key players
 - ⌘ Organizing/managing team meetings
 - ⌘ Keeping team informed/staying on schedule
 - ⌘ Being central point for proposal components
 - ⌘ Editing/drafting/refining
 - ⌘ Coordinating internal and red team reviews
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Project Management Steps for Large Proposals

Initiation

- Assign a project manager
- Identify stakeholders
- Establish objectives

Planning

- Develop a timeline and list of activities
- Establish roles and responsibilities
- Evaluate available collaboration tools

Execution

- Finalize proposal team
- Establish regular meeting schedule
- Establish and maintain a document repository

Monitoring and control

- Monitor timeline and activities
- Provide corrective measures as needed

Closure

- Conduct compliance review
- Submit proposal
- Conduct formal lessons learned meeting/survey

Scenarios: Writing the Proposal

- ❑ Professional grant writer
 - Internal or external
 - ❑ One primary team writer, with multiple input from rest of team
 - ❑ Several team writers, one for each section
 - Separate editor
 - ❑ Reconcile styles, language, tone
 - ❑ Produce coherent document
 - ❑ Write transitions, introductions, conclusions
 - ❑ Fill omissions, eliminate redundancies
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Professional Grant Writer/Consultant

■ Pros

- ❑ Proven track record
- ❑ Can write quickly and expertly
- ❑ Used to deadlines
- ❑ May find the gaps
- ❑ Not involved with egos or personal history
- ❑ Can commit the time

■ Cons

- ❑ Expensive
 - ❑ Difficult to find
 - ❑ May not understand the science/project
 - ❑ May not know the institution
 - ❑ May not share the passion
 - ❑ May not know the grant program
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Questions? Comments?

Great thanks to Kirsten Torguson and other colleagues and consultants who provided advice and support for this session. Thanks to all who attended and participated.

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