DEVELOPING A STRATEGIC PLAN FOR FUNDING YOUR RESEARCH

Carly Cummings, PhD, CPRA
Senior Director, Office of Research and Faculty Development
GOALS FOR TODAY

- Understanding *why* you should develop a strategic plan
- Understanding the U of I *resources* available to help develop that plan
The WHY?

More proposals ≠ more success
Better proposals = more success
CRAFTING A RESEARCH STRATEGIC PLAN

GETTING STARTED:

KNOW YOUR DESTINATION

- Know your P&T process, criteria
- Know your Position Description
- Include your research aspirations

TRACK YOUR JOURNEY

- Create SMART goals
- Have an annual plan
- Make note of milestones
- Begin collecting evidence
CRAFTING A RESEARCH STRATEGIC PLAN

GETTING STARTED:

1. Assemble your advisory team(s)
   - Research mentor(s)
   - Collaborators
   - Trusted colleagues
   - Department chair

Purpose - *guidance*
Mission: To provide the resources and services to University of Idaho faculty that enhance their success and productivity in their field of scholarly efforts, with the ultimate goal of growing the U of I’s research enterprise

- Across all disciplines
WHO IS THE OFFICE OF RESEARCH AND FACULTY DEVELOPMENT (RFD)?

Carly Cummings
Senior Director
208-885-1058
cummingso@uidaho.edu

Max Eberts
Senior Proposal Development Specialist
208-885-5996
maxeberts@uidaho.edu

Laura Heine
Senior Proposal Development Specialist
208-885-2079
theine@uidaho.edu

Julia Hanley
Proposal and System Manager
208-885-1225
johannese@.uidaho.edu

Wendy Hessler
Proposal Development Specialist
208-885-7097
whessler@uidaho.edu
WHAT DOES RFD DO?

Successful, funded research leaders
PROPOSAL DEVELOPMENT SERVICES

Level 0
• Brainstorming
• Strategic planning for submissions

Level 1
• Search for funding opportunities
• Training to use Pivot

Level 2
• Preparing to contact Program Officers
• Assessing “fit” of a proposed idea

Level 3
• Strategize for a resubmission
• Analyze reviews, develop responses

Level 4/5
• Ensuring proposal documents are clear, concise, cohesive, and responsive to the solicitation

Level 6
• Support for large, complex proposals
• Center grants, infrastructure, etc.

All services are optional and are granted on a first come, first served basis
FACULTY DEVELOPMENT OFFERINGS

Library of >50 Recordings and presentations available [here](#)

Proposal competitiveness tips from Program Officers and U of I experts

- General and program-specific topics
LEADERSHIP DEVELOPMENT OFFERINGS

Proposal Development Academy: What You Need to Know Before You Write

- Enhancing **grant readiness** of early-career faculty members

<table>
<thead>
<tr>
<th>Topics</th>
</tr>
</thead>
<tbody>
<tr>
<td>Developing a 5-year Research Funding Plan</td>
</tr>
<tr>
<td>Crafting A Research Funding Profile; Overview of Pivot</td>
</tr>
<tr>
<td>Uncovering Sponsors’ Grant and Funding Data; Know your funder</td>
</tr>
<tr>
<td>Contacting Program Officers, Serving on Review Panel</td>
</tr>
<tr>
<td>Dissecting Proposal Solicitations for Effective Proposal Writing</td>
</tr>
<tr>
<td>The Anatomy and Architecture of a Successful Proposal</td>
</tr>
<tr>
<td>Collaborations, Colleagues, and Connections</td>
</tr>
<tr>
<td>Strategies for Ancillary Documents; Research Resources</td>
</tr>
<tr>
<td>The End is Just the Beginning – Grant Readiness Self-Assessment</td>
</tr>
</tbody>
</table>

- 9-week cohort program in Spring semesters
- Dean nomination in October to participate
ORA: Office of Research Assurances
OSP: Office of Sponsored Programs
OTT: Office of Technology Transfer
CRAFTING A RESEARCH STRATEGIC PLAN

WHEN?

- Timeframe
  - One-, three-, five-year plans?

- Timeline for proposal submissions
  - More proposals ≠ more success
  - Better proposals = more success
    - Leading 1-2 proposals/year to start
      - Depends on proposal writing experience
      - How long to develop and write 1st proposal?
DEVELOPING A RESEARCH PLAN

HOW? LOGIC MODELS

Roadmap to a specified end

KNOW YOUR DESTINATION

- Outcomes
- Know P&T Process - timeline
- Know your PD

KNOW YOUR CRITERIA

- Outputs
  - Department, college criteria
  - Strategies to create those outputs
DEVELOPING A RESEARCH PLAN

BACKWARDS DESIGN

Model of planned activities, outputs, and outcomes over time

PREPARE FOR THE JOURNEY

- Have an annual plan
  - Specific strategies for activities
  - Intended outputs and outcomes
  - Reconsider as needed

- Make note of Milestones
  - Annual evaluations
  - Third year review
  - P&T portfolio submission

- Begin collecting evidence - outputs
# DEVELOPING A RESEARCH PLAN

<table>
<thead>
<tr>
<th>Year 1</th>
<th>Year 2</th>
<th>Year 3</th>
<th>Year 4</th>
<th>Year 5</th>
<th>Year 6</th>
<th>Products &amp; Exhibits</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fall</td>
<td>Publication #2</td>
<td>Research Project #2</td>
<td>Parental Leave</td>
<td></td>
<td>Tenure Review</td>
<td></td>
</tr>
<tr>
<td>Spring</td>
<td>Publication #1</td>
<td>NSF proposal deadline</td>
<td>Milestone – 3&lt;sup&gt;rd&lt;/sup&gt; Year Review</td>
<td>Research Project #3</td>
<td>Conference</td>
<td></td>
</tr>
<tr>
<td>Summer</td>
<td>Research Project #1</td>
<td>Prelim. data for NSF proposal</td>
<td>Fellowship deadline</td>
<td></td>
<td></td>
<td>Milestone - Submit P&amp;T materials</td>
</tr>
</tbody>
</table>

**Related to:**
- Research agenda
- PD
- P&T criteria
- Personal aspirations

**Examples:**
- Scholarly products
- Research impact
- Graduate students
- External funding
- Internal grants
- Awards
- Presentations at professional mtgs
- Other
5-YEAR RESEARCH STRATEGIC PLAN

HOW TO USE IT:

- Basis for annual goals and plan
  - Share with Department Chair, crew
- Prioritize time for research
- Communication tool
  - Strategic requests for course buyout
- Accountability tool
- Track progress, products, and timeline
- Departmental coordination

This could be you!
HOW TO GET STARTED

Plan for some time to think

- When you consider the trajectory of your career in the next 5 years, how will you organize your research agenda?
  - Position description – time allocated
  - Research statement
    - How many projects will you pursue?
  - What collaborators will you need?
HOW TO GET STARTED

Plan for some time to think

- How will you **fund** your future work on *<research topic(s)>*?
  - What grants, fellowships, or awards will be logical for you to pursue?
    - Those that your PhD or postdoc advisor(s) pursued/received?
- How will you continue to look for and review *new* funding opportunities?

- Regularly review your plan with your crew
AUDIENCE POLL

OTHER PLANS?

What methods do you use to develop annual strategic plans?
NEXT/FIRST STEPS

1. Sign up for OSPPI listserv

2. Review our website and tri-fold brochure
   - Proposal development resources
   - Review and request our services
   - Consultations are welcome!

REQUEST RFD SERVICES
HOW TO STAY CURRENT

Sign up for OSPPI listserv [here](#)
TAKEAWAYS

Grant proposals need to be in service to your research goals.

Your time is precious. A research plan helps you manage your time and prioritize and schedule activities to meet your goals and outcomes.

RFD can provide you with resources, tools, and support to help you develop research strategic plans and enhance your grant readiness.