

The background features a dark blue field with a complex, abstract pattern of curved, overlapping lines. On the right side, these lines form a tunnel-like structure that recedes into the distance. The lines are rendered in various shades of blue, from deep navy to bright cyan, and some areas show a fine grid or mesh pattern. The overall effect is one of depth and dynamic movement.

Positioning for Proposal Success

A FUNDAMENTALS OF RESEARCH DEVELOPMENT
PRESENTATION

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“The best ideas don’t get funded; the *best positioned* ideas do.”

—David Stone

Associate Vice President for Strategic Innovation and Planning
Northern Illinois University
NORDP Immediate Past President



What is "Positioning"?

- As defined by the *Oxford English Dictionary*:
 1. The action of putting a person or thing in a certain position, esp. an effective or advantageous position; (also) the fact of being in a certain position or location
 2. *Marketing* (orig. U.S.). The identification of a product, service, or business as belonging to a particular market sector; strategic or distinctive promotion within a targeted market sector.

Positioning Statement

For Target Customer that Needs/Cares about,
Company/Product/Service is a Category/Solution
that Benefit.

Unlike competitor, Company/Product/Service is
Unique Differentiator.

TREW
Marketing

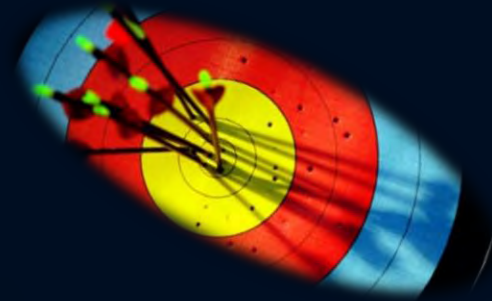
Positioning Strategies →

Positioning

- There are seven positioning strategies that can be pursued:
- **Product Attributes:** What are the specific product attributes?
- **Benefits:** What are the benefits to the customers?
- **Usage Occasions:** When/how can the product be used?
- **Users:** Identify a class of users.
- **Against a Competitor:** Positioned directly against a competitor.
- **Away from a Competitor:** Positioned away from competitor.
- **Product Classes:** Compared to different classes of products.

Positioning in a Grants Context

- In research development, “positioning” describes a group of activities and actions undertaken to ensure that:
 - a. The individual (or the individuals making up the team) has the standing to be credible when discussing the project being proposed;
 - b. The project itself is important, feasible, likely to succeed, and moves forward toward a larger goal;
 - c. The proposal is being made to a funder (or a funder’s program) that is appropriate, interested in such work;
 - d. The project, if funded, will help the funder achieve its own strategic or programmatic goals; and
 - e. All of the foregoing are appropriately demonstrated in the proposal.



Positioning an Investigator

- Successful investigators will be well-positioned with respect to:
 - Their field of inquiry and its relevant literature(s)
 - Understanding who are their potential or actual competitors for funding
 - Their major funding source(s)



Three Domains of Positioning for Investigators

- Positioning as a scholar
 - (where “scholar” means “someone who participates in a community of knowledge, and contributes to it in appropriate ways”)
- Positioning as a researcher
 - (where “researcher” means “someone who is skilled in certain techniques or practices related to one or more scholarly or academic disciplines”)
- Positioning as a grant writer/administrator/investigator

Positioning as a Scholar

- Participating in the scholarly community by:
 - Publishing (or its functional equivalent) – being part of the conversation as the community debates issues of importance
 - Going to conferences and seminars, and presenting results in these venues – keeping up with what's going on in the field, trying out ideas, and getting feedback from colleagues
 - Serving as a reviewer (for conference proposals, grant proposals, journal articles, etc.)
 - Serving in relevant professional organizations

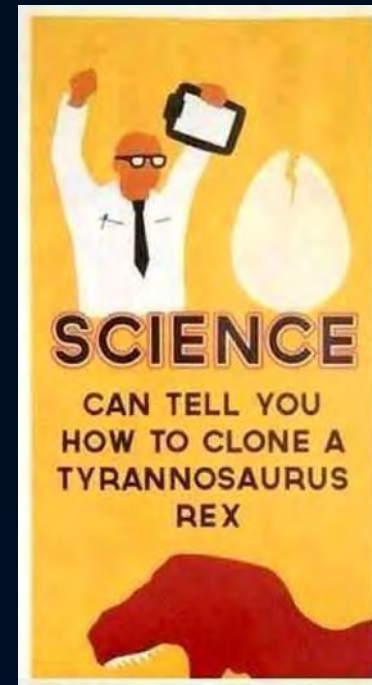


Participation for PIs

- Demonstrates their engagement with the field.
- Helps sharpen their arguments & gets them feedback from their colleagues/peers about their merits (or lack thereof) before \$\$\$ are on the line.
- Helps them become known in the reviewer community and to their peers.
- Helps them know who their peers (and competitors) are.
- Helps them understand how their work fits with the overall body of knowledge/literature in the field.

Integration is Important

- Scholarship feeds research. That feeds grant projects. Those lead to more scholarship. Lather, rinse, repeat.
- Activities in different spheres (research/teaching/service) reinforce and feed off of each other.
- Scholarship should inform teaching and mentoring (of students, post-docs, etc.), and vice-versa



Positioning as a Researcher

- Investigators should have a research arc/plan in mind, and revise it as needed & appropriate (i.e., new results, new directions)
 - This helps anchor them within the disciplinary conversation
 - Can also help demonstrate sustainability to funders: there will always be a logical next step; not simply following the money
 - N.B., that research arc or plan should be the basis of any early-career research proposals (NSF CAREER, DOD Young Investigator, NASA ECF, etc.)



CHALLENGE ACCEPTED

Positioning as a Researcher

- Develop & maintain good working relationships with important populations and/or partners:
 - Established collaborations are an easier sell to sponsors
 - People who know them & their work will write better letters of commitment
 - Knowing where the dragons and the buried treasures are, also who is likely to help (or hinder)
- Develop & maintain experience/certifications for relevant equipment or techniques
 - History is important: if a PI has never used a technique before, what reason do funders have to believe she understands it well enough to predict outcomes?

Positioning as a Grant Writer/Administrator

- Grants are a lot like jobs: nobody wants to give you one until you have relevant experience
- Basic levels:
 - Exposure to the world (very basic understanding)
 - Experience as participant (postdoc, collaborator, co-investigator): deeper level of understanding, but still not active in management, limited role in technical/scientific design of the project
 - Leadership on funded projects

Knowing the Competition

- Investigators must be able to do at least one of the following in any credible proposal:
 - Distinguish the project from those of their competitors
 - Explain why their approach is better or more likely to succeed than competitors'
 - Explain why they are more likely than their competitors to reach or include relevant populations
 - Explain why they will have more or better broader impacts
 - Explain how they are building on others' work

Where Do RD Professionals Fit In?

- Support researchers & scholars in developing more competitive proposals
- Models, tasks, responsibilities all vary across institutions:
 - May be a separate function/office
 - May be one of many roles in a pre-award research administration office
 - May be official job role/responsibility, or an informal component
 - May or may not be reflected in job title

Some Common RD Roles

- Voice of experience (especially with new or less-experienced investigators): I've been down this road before, and I can show you the way
- Coach: This is how that sponsor/program works, and here's the best way to beat their game
- Cheerleader: You can thrive, not just survive; I've seen proposals in far worse shape much nearer the deadline than this one
- Advocate
- Matchmaker (in the collaborative sense)
- Trainer*

Engagement

- Engage with the researchers/scholars you support:
 - Helps you learn about what they do, how they do it, what they like, etc.
 - Often, they're surprised that someone in this role actually cares
 - The better you understand the work, the better you're able to support it:
 - Identifying fruitful opportunities for funding
 - Identifying potential collaborators (or competitors)
 - Reminding them of "the dream" – and warning them, gently, when they start getting away from it



The First Meeting

- Set goals and expectations – and be realistic: don't over-promise or try to bluff your way through it
- Describe the institutional expectations, the office process, and your own processes – and listen for theirs
- Get a sense for dreams, hopes, challenges
- Where are they coming from, and what was that like?
- What are past experiences with research? With research development?
- Where are they on the career (or tenure) path?

Cultivate “The Dream”

- A question I often ask researchers & scholars when I work with them for the first time (and especially when they’re just starting out in their own careers) is “What do you want to be known for when you retire?”
- Contrast that with the perennial job interview standard, “Where do you see yourself in five years?”
 - Focuses on the short term, without providing bigger context
 - Asking the bigger question allows for more depth and nuance
 - If you know the endpoint and the starting point, mapping out a direct route is much easier

The Two-Pager

- A good tool in identifying “the dream” for a researcher or scholar is to ask for a two-page (or short) summary of what they do and where they think it’s going
- There’s nothing magical about two pages: it can be a little longer if needed, or it can be even shorter – the goal is to get the researcher or scholar thinking and crystallizing their work
- The Two-Pager should be part of a larger, longer conversation, and should also be updated as work progresses and ideas change
- Serves as an *aide-mémoire*, and as a reference point: can also be a good first draft for the elevator speech or a pitch to program staff

Then Build from There

- The Two-Pager should help develop a larger, longer-term research agenda or plan:
 - A road map (or at least a sketch) of integral steps toward their ultimate goal
- The longer plan can then be broken down into three- to five-year segments (each of which could be the basis for a grant proposal)
- As noted earlier, the full research arc should loom large in the narrative of any early-career proposals
 - Researchers have a tendency to treat these as super-sized research grants, forgetting that their purpose is to launch promising individuals onto a research arc: if they don't describe such an arc, they won't get funded

Other Ways of Helping Position Researchers

- PI academies/boot camps
- Workshops (internal, or provided by sponsors or other organizations like the Foundation Center)
- Writing groups/circles
- Lightning talks
- Others?

Positioning: Not Just for PIs

- As RD professionals, we have a community of practice to keep up with as well (Hint: It's everyone in this room!)
- To quote a colleague, "You can network, or you can not work"
 - Building your network helps you facilitate connections and makes you aware of other resources/groups/populations
- Think about a career arc
 - Even if RD is just a stop on the road to somewhere else, be mindful about how that transition happens

Get Involved

- At your institution:
 - Helps you learn the power structure and how things get done
 - Raises your awareness of institutional strengths, resources, strategic plans, etc.
 - Boosts your visibility with the researchers and administration
 - Demonstrates commitment, helps boost your credibility
- In the profession:
 - Get to know your colleagues – they'll be an invaluable help
 - Burnish your resume, but also develop skills that will come in handy as you develop in your career

Get Involved

- With your researchers and scholars:
 - Go to their research talks when you have time (and make time for at least some of them) – or help start a seminar series, a writing group, etc.
 - Encourage them to contact you (I steal NSF's tagline, "Call early, call often")
 - Follow up if you haven't heard from someone in a while
 - As you see things that are potentially of interest, don't be afraid to send them along: the better you get to know them and their work, the more likely it is that these will be relevant

Questions?

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