Using Project Management Skills to Manage Grant Proposals

from a “Center Perspective”

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Administrative Manager,
Cornell Energy Systems Institute (CESI)
Cornell University

Assistant to Director (p/t)
Institute for Materials Research (IMR)
Binghamton University
Admin. Manager, Cornell Energy Systems Institute (CESI)

- Fundraising (Grants & Donation)
  - Large Center Grant Proposals
  - Grant writing, proposal coordination, budgets, etc.
  - Work with development office on donations
- Finance & Award Management
  - Donations & Sponsored Funding
- Manage employees:
  - Admin. Assistant, Lab Manager, team of 19 post-docs /students
- Manage a user facility lab
  - Facility user rates, safety, access, etc.
- Manage the Student Energy Systems Club
- Handle IP
  - Work with CTL on patents, disclosures, MTAs, NDAs, etc.
- Purchasing
- Event Coordination
- Weekly Energy Seminars
- Encourage Research Collaboration among 50+ faculty
  - Research Cluster teams
  - One-on-one meetings
- Funding Searches
- Communications
  - Website maintenance
  - Newsletter

#NORDP2019  Providence, RI  April 29 – May 1, 2019
Assist. to the Director, Institute for Materials Research (IMR), Binghamton University

- Fundraising (Grants)
  - Grant writing, proposal coordination, budgets, etc.
- Award Management
- Handle IP
- Purchasing
- Encourage Research Collaboration among 27 faculty
- Funding Searches
- Website Maintenance

All using...
- Project Management Skills
“Project management is ‘the application of knowledge, skills, tools and techniques to project activities to meet project requirements’. Project managers must not only strive to meet specific scope, time, cost, and quality goals of projects, they must also facilitate the entire process to meet the needs and expectations of the people involved in or affected by project activities.”
Top 5 Reasons Project Management Belongs In Research Administration:

5. Helps Projects to Achieve Goals
4. Keeps Budgets Under Control
3. Increases Responsiveness to Sponsors
2. Provides Interface Between Technical and Administrative Research Functions
Top 5 Reasons Project Management Belongs In Research Administration:

Funding Agencies are Demanding It!

- Complex Interdisciplinary Projects
- Funding Announcement Requirements
  - Management Plans
  - Communication Plans
  - Milestone, Go/No Go Decision Points
  - Program Schedule
  - Risk Migration Plan
  - Budget by Task/Milestones

Now What?
“whether you are a grant writer, grant manager, researcher or program officer, [we] are all project managers”

<table>
<thead>
<tr>
<th>Project Manager</th>
<th>Grant Writer</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Establishes communications protocols and conducts status updates with team</td>
<td>• Drafts language necessary to complete a grant application</td>
</tr>
<tr>
<td>• Gathers information from multiple individuals to use in an application</td>
<td>• Conducts research on prospects or information to include in the narrative</td>
</tr>
<tr>
<td>• Creates timeline/work plan to identify key milestones</td>
<td>• Drafts, or supports drafting of, budgets for applications</td>
</tr>
<tr>
<td>• Identifies risks and information gaps associated with the award and/or project implementation</td>
<td>• Creates and/or revises attachments to supplement application</td>
</tr>
<tr>
<td>• Identifies and collaborates with key personnel needed to support project implementation</td>
<td>• Reviews application content</td>
</tr>
<tr>
<td></td>
<td>• Completes reports as necessary during post-award period</td>
</tr>
</tbody>
</table>
5 Steps

1. Initiate:
   - Make sure you are clear on how project success will be measured

2. Plan:
   - Figure out what exactly needs to be delivered

3. Execute:
   - Engage team regularly to make sure everyone is on track

4. Monitor and Control:
   - Consistently monitor every phase

5. Close:
   - Check results against desired outcomes
8 Skills

1. Leadership –
   • Enforces processes and keeps everyone on the team in-line

2. Communication –
   • Communicates project details in writing and provides periodic status reports

3. Planning –
   • Organizes tasks in the right order to hit the right outcome at the right time

4. Time Management / Prioritization –
   • Always has an agenda and sticks to it
5. Risk Management / Problem Solving / Adaptability –
   • Identifies risks so you have a better chance of avoiding them

6. Team Management / Negotiation –
   • Sets manageable goals, oversees conflict resolution, gives constructive feedback, and does everything necessary to make the team’s work effective

7. Cost Management –
   • Plans and controls the overall cost of the project and keeps things within the budget

8. Subject Matter Expertise –
   • Knows about the area of work you’re involved in and how to communicate that to others
What does this mean in our Day-to-Day Jobs?  

- **Get Organized**
  - Review guidelines
  - Use Templates
  - Create checklists with page limits
  - Assign tasks per section

- **Create a Share Drive**
  - Allow team to edit

- **Develop a Project Timeline**
  - GANTT Charts – excel or PowerPoint.
    - Action items
    - Who is responsible
    - Status
    - Due Dates
    - Follow-up
# Excel Gantt Chart

<table>
<thead>
<tr>
<th>START DATE</th>
<th>ENDDATE</th>
<th>DESCRIPTION</th>
<th>RESPONSIBLE PARTY</th>
<th>STATUS</th>
<th>FOLLOW UP</th>
<th>DURATION (days)</th>
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<tbody>
<tr>
<td>4/19</td>
<td>5/19</td>
<td>Budget</td>
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<td>52</td>
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<td>5/19</td>
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<tr>
<td>4/19</td>
<td>5/19</td>
<td>Letters</td>
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<td>5/19</td>
<td>CVs for PS and SP</td>
<td>Jenny/PASC</td>
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<td>52</td>
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<tr>
<td>4/19</td>
<td>5/19</td>
<td>CVs for PS and SP</td>
<td>Jenny/PASC</td>
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<td>52</td>
</tr>
<tr>
<td>5/19</td>
<td>5/19</td>
<td>COAs for PS and SP</td>
<td>Jenny/PASC</td>
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<tr>
<td>6/19</td>
<td>6/19</td>
<td>Summary (400 characters)</td>
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<tr>
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<td>6/19</td>
<td>Narrative (2 pages - includes personnel table, 3-plate, budget)</td>
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</tr>
<tr>
<td>6/19</td>
<td>6/19</td>
<td>Table of Participants</td>
<td>Jenny</td>
<td>not started</td>
<td></td>
<td>61</td>
</tr>
<tr>
<td>6/19</td>
<td>6/19</td>
<td>References</td>
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<td>6/19</td>
<td>Data Management Plan</td>
<td>Jenny</td>
<td>not started</td>
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</tr>
<tr>
<td>6/19</td>
<td>6/19</td>
<td>Post-Election Mentoring Plan</td>
<td>Jenny</td>
<td>not started</td>
<td></td>
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</tr>
<tr>
<td>6/19</td>
<td>6/19</td>
<td>Facilities, Equipment &amp; Other Resources</td>
<td>Jenny</td>
<td>not started</td>
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<td>61</td>
</tr>
<tr>
<td>6/19</td>
<td>6/19</td>
<td>Draft Membership Agreement</td>
<td>Kim with DCP</td>
<td>with</td>
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<td></td>
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<tr>
<td>6/19</td>
<td>6/19</td>
<td>List of Suggested Reviewers</td>
<td>Jenny</td>
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<td>CSF</td>
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</tbody>
</table>
What does this mean in our Day-to-Day Jobs? 4,9

- Create a **Project Budget**
- Create a **Communication Plan**
  - Who needs what, when do they need it by, how will it be given to them, and by whom
- **Project Status Reports**
  - Set up weekly / bi-weekly team calls & check-in on a regular basis.
- Take minutes and include **Action Items** with person responsible.
- Follow-up
- **Identify Risks** and come up with alternatives plans
- **Document Lessons Learned**
# How to Assist Faculty from a Center Perspective

<table>
<thead>
<tr>
<th>Assistant Professors</th>
<th>Associate Professors</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Faculty Attributes:</strong></td>
<td><strong>Faculty Attributes:</strong></td>
</tr>
<tr>
<td>- New to the university</td>
<td>- More established</td>
</tr>
<tr>
<td>- Little to no grant writing experience</td>
<td>- Has a funded grant or two</td>
</tr>
<tr>
<td>- Do not have a set idea on funders</td>
<td>- A few students, maybe a post-doc on team</td>
</tr>
<tr>
<td>- 0 to 1 graduate students</td>
<td>- Writes some grants</td>
</tr>
<tr>
<td>- Open to new ideas</td>
<td>- Willing to collaborate</td>
</tr>
<tr>
<td>- Eager to write grants and collaborate</td>
<td></td>
</tr>
<tr>
<td><strong>Assist in:</strong></td>
<td><strong>Assist in:</strong></td>
</tr>
<tr>
<td>- Hand holding</td>
<td>- Proposal development coordination</td>
</tr>
<tr>
<td>o Grant writing- provide lots of feedback</td>
<td>o Provide templates</td>
</tr>
<tr>
<td>o Proposal development coordination</td>
<td>o Write administrative sections</td>
</tr>
<tr>
<td>- Funding searches</td>
<td>- Funding searches- show them different sponsors</td>
</tr>
<tr>
<td>- Finding collaborators</td>
<td>- Finding collaborators</td>
</tr>
<tr>
<td>- Finding senior faculty they can co-PI with</td>
<td>o Show them how their work relates to other projects</td>
</tr>
<tr>
<td></td>
<td>- Finding Center grants for them to Co-PI on</td>
</tr>
</tbody>
</table>
## Professor / Senior Professors

<table>
<thead>
<tr>
<th>Faculty Attributes</th>
<th>Assist in:</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Established research</td>
<td>- Proposal development coordination</td>
</tr>
<tr>
<td>- Has had several grants</td>
<td>- Provide templates</td>
</tr>
<tr>
<td>- Has a full team of students and</td>
<td>- Write administrative sections</td>
</tr>
<tr>
<td>post-docs</td>
<td>- Funding searches for new sponsors</td>
</tr>
<tr>
<td>- Writes few grants</td>
<td>- Encourage younger faculty to Co-PI</td>
</tr>
<tr>
<td>- Maybe less willing to collaborate</td>
<td>- Look for Center grants opportunities</td>
</tr>
</tbody>
</table>

**How to Assist Faculty from a Center Perspective**
Questions & Answers
References

7. PMT Institute. 12 Skills for Effective Project Management. https://www.4pmti.com/blog/skills-effective-project-management/
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