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**CREATING A PROJECT WORK PLAN**

Crafting a competitive proposal for external funding requires that a great research idea be transformed into a great research project. Whether responding to a call for proposals or seeking to initiate contact with targeted potential funders through the [Research Incentive Opportunity](http://www.education.txstate.edu/coero/funding/infund/rio.html), creating a work plan is a very effective way to think through your great idea and operationalize the research you want to conduct. By ***thoughtfully and strategically identifying the purpose and scope of your research project – and the resources necessary for success*** – preparing proposals and targeting potential funders becomes much easier, and necessary adjustments can be made to the work plan to fit any budget and project duration limitations.

*C****reating a work plan should be the first task you undertake when beginning to develop your research project or agenda.*** As you create the work plan, stay focused on the research you want to conduct; in other words, don’t allow your thinking to be constrained by a particular call for proposals. ***Always start with what you want to do, what you are passionate about…*** then apply strategic considerations to what funders are funding as well as the research necessary to address significant problems and gaps in your field.

It is important to note that ***each element of the work plan will translate into information required for any proposal and any funder****.* The time you invest to prepare the work plan will provide the foundation for your project narrative and budget.

To start, we ***focus on the “so what?” of your project*** by answering several questions (see next page) that address ***why a funder should invest in you and your research***; for example, What problem does your project address? and What is the broader impact of the project and its expected outcomes? Crafting compelling responses to these “so what?” questions *will* ***help you generate and refine your research questions***, which will then drive the operationalization of your project – the ***related key activities that define its scope of work and the resources (expertise, time/effort, other direct costs) required for success***.

Keep in mind that the scope of work must be aligned with the requested resources and budget. When responding to a request for proposals, a common error is to propose more work than can be done in the allowable time period and/or with the requested funds. ***Always start by defining the work you want to do and the resources required to successfully do the work.*** If adjustments are necessary to conform with funder time or budget limits, be sure to adjust the budget and the scope of work. Reviewers will readily notice if the work plan, timeline, and budget are not aligned.

Please note that the two provided templates are guide… a starting point for operationalizing your research project. Adjust the templates as necessary – or locate another template – to make the process work best for you. Since the work plan is a working document, perfection is not required. We just need enough detail to accurately describe the scope of work and required resources.

Finally, please know that [**Stephanie A. Korcheck**](http://www.education.txstate.edu/orsp/about/skorcheck.html), Research Coordinator for Proposal Development, is available to help conceptualize your research to optimize its fundability and complete the work plan template. Do not hesitate to contact her to assist with this process. Once the project activities, timeline, and required resources are identified, we can search for funders and/or potential funding opportunities as well as begin drafting the concept paper(s).

**<*INSERT PROJECT NAME*> SALES PITCH**

When responding to these prompts, speak from your passion about the work (as opposed to your academic viewpoint).

Responses to these questions form the basis of your “sales pitch” to the funder, so showing your passion about why this project is so important to you is critical.

Don’t worry about wordsmithing. Imagine you meet someone with a big checkbook… what words/phrases would you use to capture their interest in this research?

***Set a timer for 15 minutes… GO!***

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| 1. **What problem/need does your project address? Why is addressing that problem/need important?**   This response will be crafted into the first several sentences of the proposal/concept paper, so it is critical to capture the context for this work. |  |
| 1. **How will your project address the problem/need?**   Not a description of the project; instead, how will your expected outcomes positively impact the problem? |  |
| 1. **How is your project innovative?**   How is your project different from what has already been done? Does it fill an identified gap in the literature? |  |
| 1. **Who will benefit from your project?**   Directly: e.g., participants and their organization(s); you, as a researcher; your students, department, college  Indirectly: e.g., Texas State, local schools, others in targeted population, the state/nation/world | Directly: |
| Indirectly: |
| 1. **What is the broader impact of the project and its expected outcomes?**   Address filling gaps in the literature as well as informing policy and practice. We want the funder to see that their investment will reach beyond this project. Think big! |  |

**Identify your Research Questions, Specific Aims, Hypotheses, and/or Goals**