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Exhibit 9.3 – Team Building Worksheet

[Sidebars are great for calling out important points from your text or adding additional info for quick reference, such as a schedule.

They are typically placed on the left, right, top or bottom of the page. But you can easily drag them to any position you prefer.

When you’re ready to add your content, just click here and start typing.]

[Sidebar Title]

1. Know your personal preferences and the pro-active grant seeking strategies you want to provide to your team.
2. Identify and recruit members for your grants team. Make sure to include individuals who prefer to perform the strategies you personally do not want to execute.
3. Two or more individuals may decide to work together on the same strategy. If this is the case, coordinate their efforts to avoid duplication.
4. The team members will need to volunteer to complete several of the necessary strategies.

The following information is provided to help you identify and match your preferences with the required tasks. After you designate the tasks you prefer to perform, ask your prospective team members to complete the worksheet and designate the tasks they prefer. Then, use the results to initiate a discussion that results in:

* the assignment of strategies to those who have the skill sets and preferences to accomplish them,
* a conversation on how team members can help and learn from each other by sharing skill sets, and
* use of the project planner to outline the projected beginning and ending dates for completing the proposal strategies in a timely manner that maximizes the efficiency of each team member’s work.

**Pro-Active Grant Seeking Activities/Steps that must be Undertaken for each Grant/Proposal Development Submission and Execution**

Initiate a call to invite colleagues together to explore solutions to a defined problem/opportunity that will be the basis for a grant/proposal.

* Set-up/reserve a space for the meeting. Identify and address refreshment needs, necessary recording equipment, etc.
* Provide attendees with a brief summary of the literature that documents the need to address the problem.
* Lead those interested in brainstorming new, creative solutions that will close the gap in knowledge and practice and move the field ahead.
* Record the ideas/suggestions for closing the gap.
* Develop a prioritized list of potential strategies using values voting. Select 3 of the proposed strategies that fulfill the RFP (Request for Proposal) and incorporate the interests of the team members.
* Develop a list of those participants who want to stay on the team.
* Establish team rules – attendance, meeting dates and times, team leadership, etc.
* Update the relevant literature search.
* Develop a list of key search terms related to the problem area.
* Complete a grantor search profile and input it into the appropriate grantor data base (Spin, Pivot, grants.gov, Foundation Center, etc.).
* Review the list of prospective grantors to determine a rough, first cut of those that provide the best match based on interest in the problem, size of grant requested, number of grants provided to your type of organization, etc. Rate them using exhibit 14.9 (page 179) in *The “How To” Grants Manual*.
* Review abstracts/summaries of federally funded proposals for insight into the fundability of your proposal.
* Request copies of funded proposals and compare these to you preferred approaches.
* Develop 1-page concept papers for the most fundable proposals.
* Develop an advisory committee consisting of experts to give you valuable feedback and insights about your chosen approaches and to support (endorse) your proposal.
* If allowed, make pre-proposal contact with funding officials to gather insight into how to tailor your proposal to the grantor’s interest. (Use email, phone, personal visit, or meeting at a conference to make contact.)
* Discuss and determine the Team to pursue the proposal most likely to provide a motivating approach to closing the gap in the field.
* Develop insight into the background of those who will read and evaluate proposals (reviewers, board members, etc.).
* Research the scoring rubric/criteria to be used in evaluating your proposal.
* Prepare a draft of your proposal using previously funded proposals and all available instructions as guides.
* Complete a spreadsheet (project planner) that details the hypothesis, protocol, aims, objectives, and methods in a sequential pathway. Indicate what will be done, who will do it, what the time frame will be, and what support will be needed. Provide a budget and justification for each person, consultant, and non-personnel cost for each step in the proposal.
* Contact administrative officials to alert them about the upcoming proposal and deadline for support (*How To*, exhibit 10.1, page 106).
* Draft a budget from the project planner spreadsheet. Seek assistance from the personnel office and the office of research and funded programs to estimate costs for organizational personnel and for guidance on hiring consultants, purchasing equipment, payment of sub-contractors and subjects, etc.
* Organize and conduct a quality circle/mock review in a timely manner so that suggestions can be incorporated into the final proposal before submittal.
* Coordinate proposal sign-off and submission to ensure that the proposal is submitted in the correct format and before the deadline.
* Organize and conduct a team meeting after receiving the notice of award or rejection to determine the next steps (implementing the proposal, re-submitting it to the same grantor, submitting it to a different grantor, etc.).
* Transmit thank-you notes to the granting/program official whether awarded or rejected.
* If awarded, follow up on how to access and expend your funds and how to document expenditures.
* Review the proposal for filling staff vacancies and review hiring procedures with Human Resources.
* Pull the team together to review the project planner and re-commit to the action steps, and end dates, personnel needs/hiring, equipment purchases, required actions, etc.
* Set dates, times and locations for project team meetings to discuss planned budget expenditures, completion of project activities, completion of reports, etc.
* Develop protocol for unplanned problems that may arise.
* Develop plans for conferences, presentations, and the writing of related articles.
* Create a plan for resubmittal for the next year.
* Develop a plan for grantor site visits.

These are just some of the tasks that a funded project needs to plan for. Naturally, all the team members will not be great at all the tasks. Because of our individual differences, some team members will enjoy completing tasks that others will dislike. But like or dislike, the tasks must be completed. Assigning tasks to team members based on who can accomplish and enjoy them is not only the best way to go but also provides the basis for further work together.

If there are tasks and strategies that no one on the team is good at or enjoys doing, consider adding individuals to the team who possess the necessary skills and aptitude.

Grant funded projects that are attempted through consortia are particularly prone to problems because of the need for increased communication and coordination. In these cases, the specific assignment of tasks is even more crucial to keep everyone on a friendly, performance-based, professional basis.