
Lost in Translation

Defining Proposal Terms and Activities

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The price of doing business



Partnerships must go “right” for business success

Examples of disconnects

- What happened?
- When did it happen?
- Why did it happen?
- What will keep it from happening?

During this session we will

Introduce ourselves

Repeatedly

What do I do?

- First APMP Foundation and Practitioner Certified Proposal Manager at Arizona State University
- My office: competitive intelligence, proposal management, graphics/desktop publishing
- Since January: 44 proposals managed, with a total value of \$343M (three > \$20M, four > \$10M, six > \$5M)
- Majority are federal **grant** opportunities
- Strong familiarity with contract work, but primarily NASA, USAID, and Dept. of State

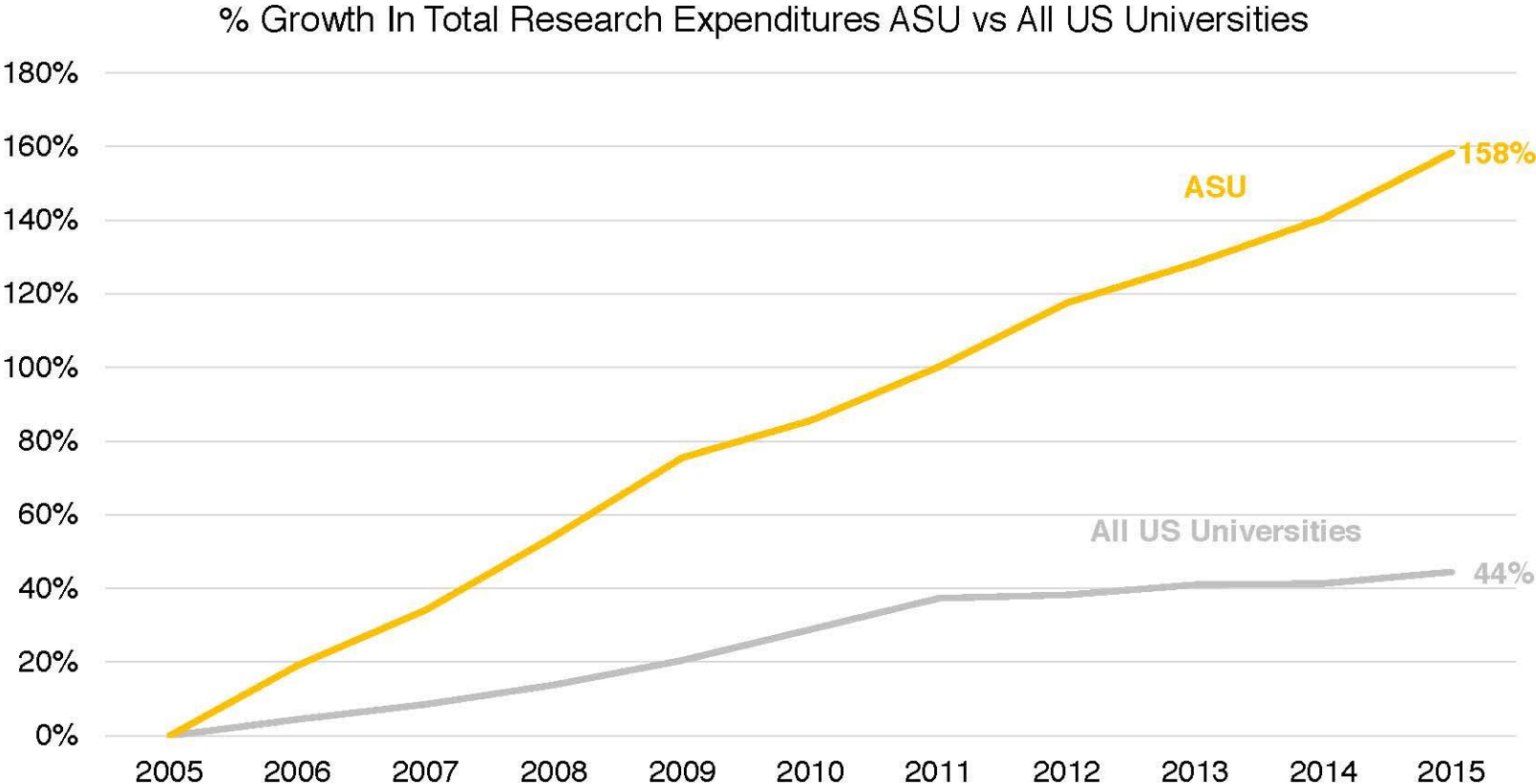
What do you do?

- Turn to your right and tell your new friend your title
 - Two minutes
- People on the receiving end, ask 5 yes/no questions to find out what they do for a living
- Write down 2 – 3 tasks you think that they do in their position
- Introduce them to us



Arizona State University as a case study

Research Growth



ASU's growth in Total Research Expenditures is more than triple that of all US Universities

Arizona State University

- \$250M to \$525M in expenditures over the past 10 years
 - ❖ 2015: UT Austin \$585M (med school); MSU \$526M (med school); UCLA \$948M (med school)
- Fastest growing research enterprise nationally without a medical school
- Increased professionally managed proposals and best practice training across staff and faculty
- 0 to 5 proposal managers over past 5 years (+3 have left the university)
- Inaugural capture management training this week (15 people)

OUR SUCCESS REQUIRES TRANSLATION

What do I do? - DISCONNECT

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- Since January: **44 proposals managed**, with a total value of \$343M (three > \$20M, four > \$10M, six > \$5M)
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At ASU, I lead a team of academic proposal managers:

- SME's are lead writers
- Clients are federal agencies
- Awards are primarily for knowledge generation

Translation is important....

- Working with external partners
- Working across internal departments
- Training, cross-training, and matrix training

"The calendar has a red team review."

- When is document delivery?
- What is expected return date?
- What is the quality of the review?
- How is feedback received?



Second chance to introduce yourself

- Turn to your left and describe your “business” to the other person
 - Two minutes
- People on the left:
 - Do not ask questions,
 - Do not make a face
- Write down three activities of the business
- Report out on what that person’s business using an example

Ways to connect with each other

Linear – passing off between teams

Networked – flowing across and between teams

Matrixed – under direction of others who lack direct authority

Parallel – teams and individuals work at the same time

Hierarchal – under direction of someone with authority

Ultimately

Regardless of path:

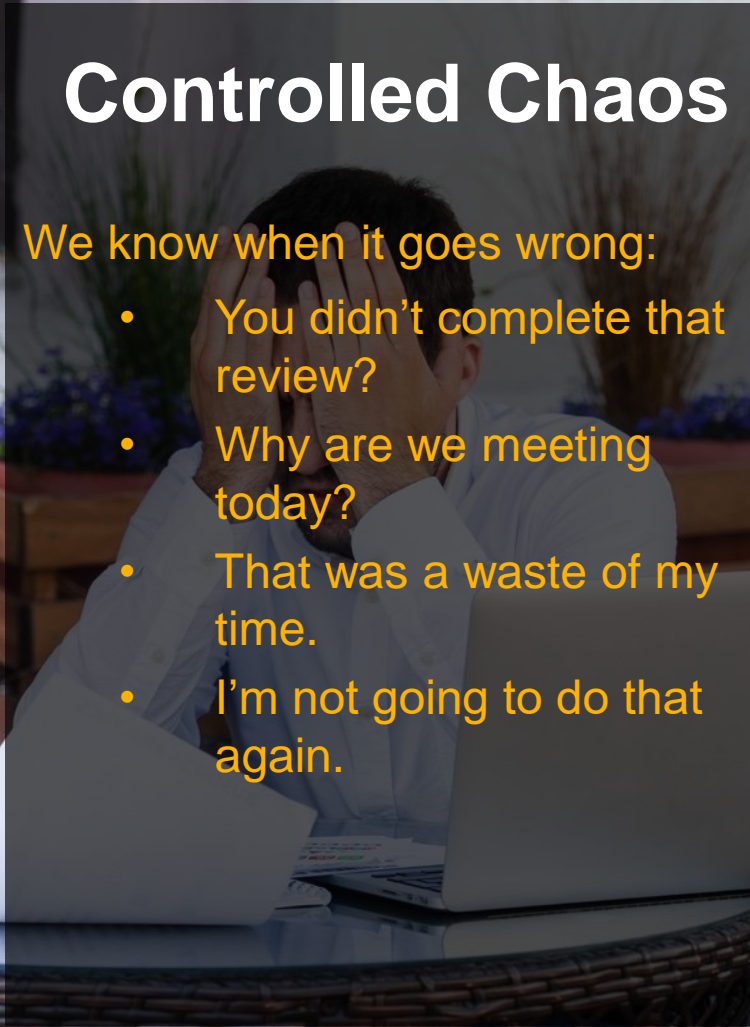
- **Capture plan**
- **Bid qualification**
- **Proposal plan**
- **Proposal**
- **Award**



Controlled Chaos

We know when it goes wrong:

- You didn't complete that review?
- Why are we meeting today?
- That was a waste of my time.
- I'm not going to do that again.



Words we use are important

- Jargon
- Slang
- Non-client facing
- Implicit understanding
- Idiom
- Acronyms

Getting farther faster

Academics trade “knowledge” as goods

What is your currency?

What if we reframe conversations as an exchange of goods?

Creation of trading zones

- Identify common objects
- Create a shared experience and definition
- Create a “creole”

Trading zones

- **Identify common objects**
- **Create a shared experience and definition**
- **Create a “creole”**

Intellectual framework

- Peter Gallison described “trading zones” to explain how physicists communicate with engineers (1997)
- Harry Collins and Robert Evans advanced “interactional expertise” to describe what you learn when chatting with someone about a topic (2002)
- Science of team science (2006) to study how large-scale, team-based research teams address complex problems
- Michael Gorman, Groves and Catalano applied these theories into national initiative on interdisciplinary dialogue on nanotechnology (2004)
- Alan Paul, Faye Farmer, Michael Gorman workshop at National Organization of Research Development Professionals on managing teams (2017)

Boiled down:

- The more disparate your knowledge and experience, the harder you have to work at communicating
 - Industry – Academia
 - Healthcare Equipment – Staffing
- Creating a creole could be a way to short circuit disconnects within and across capture and proposal teams to accomplish individual and team tasks successfully
- At ASU: proposal calendar, shell document, draft review dates, external review.





A selfie

Words are important

- Turn to your right
- Define three business terms used in your work that fall just outside of the APMP definition
 - How are they different?
 - Why are they different?
 - What problem were they designed to solve?
 - What problems do they create?
 - In partnership, what did the term become, in other words, what was the creole you created?
- Present your best one to the group



Rinse and Repeat

- **Scoping your work (project charter)**
- **Best practice (reliable, reproducible)**
- **Constant communication (stand ups, emails, phone calls)**

Your creole should be scalable.....

- Continue to include a wider range of stakeholders
- Test terms
- Adjust according to feedback
- Adjust as perceptions and business evolve



Team Considerations

**Generational
Experience**

Gender

Ethnic

Cultural

Making adjustments for teams

- This is what it used to mean.....
- My other company
- S/he never listens to me (us).....
- I know exactly what that means....

Thank you



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