



TurboSBIR

powered by OMNISYNC

Taking the academic approach

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Next Steps

TurboSBIR™ – The ‘TurboTax’ for SBIR grant applications

(TurboTax® is a registered trademark of Intuit)

Small business research grants & contracts across all agencies

Streamlined application process

Search-to-submit software & grant writing support

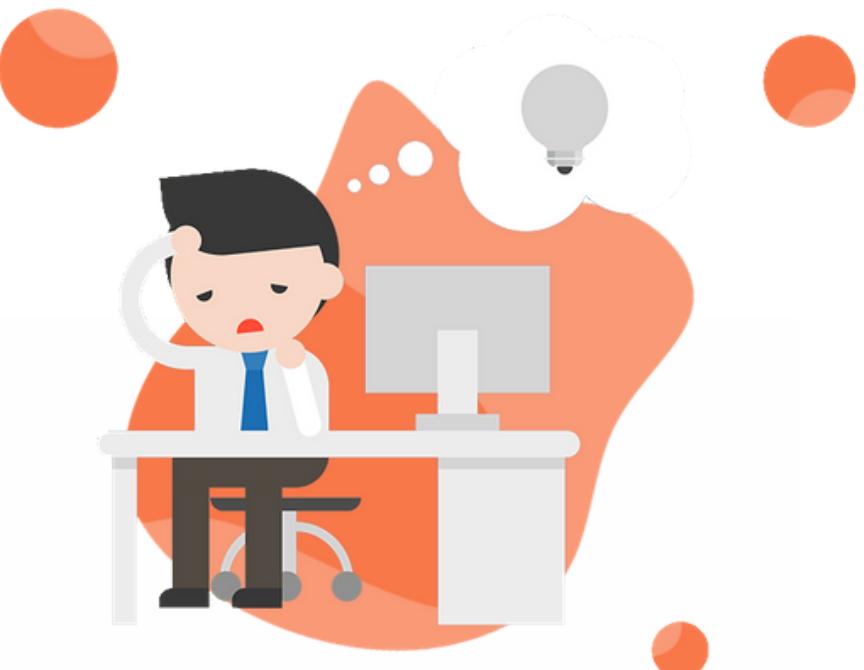
[More Information](#)

Grant searching is free forever. Grant applications are unlimited under one monthly affordable subscription.

Lit Review Findings

Requirements are not always clear or easily found

- Instructions are often buried in the Abstract
- Each agency has its own submission requirements
 - Very specific about formatting and labeling
 - Margins widths and page limits
 - May need to initiate contact prior to submission



Lit Review Findings

Proposals are very time consuming to prepare

- It can take at least 120 hours to write a proposal
 - There were 54,900 proposals in 2018 to NIH
 - 6,588,000 hours/274,500 days, 39,214 weeks, 752 years
- Time spent preparing grants takes away from R&D
- Time spent preparing grants takes away from teaching

Lit Review Findings

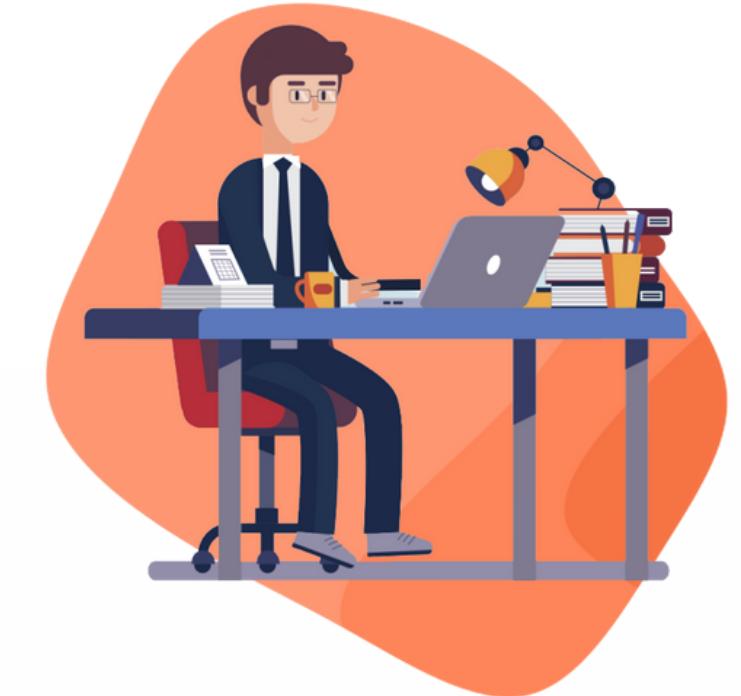
Success rates need to increase

- Current success rate sits at 20%
 - Has not passed over 22% since 2005
- 54,900 proposals in 2018 to NIH
 - $20\% = 10,980$ successful proposals = 1,317,600 hours
 - 43,920 unsuccessful = 5,270,400 hours lost

Lit Review Findings

Systems are already exist for research training

- Many R1/R2 universities provide workshops and training
 - Mentors will advise the process
 - Networking with colleagues
- Grants.gov offers tutorials and videos online
 - Search, eligibility, process, etc.
 - Provides grant tracking
- grants.org publishes submitted proposals - currently has 215



Lit Review Findings

Collaborative research complicates matters

- Collaboration is becoming more common
 - Federal government is pushing for more collaborative R&D
 - Technology is making collaboration easier
- University procedures don't always line up
 - Resources available as part of the process
 - Internal deadlines for review and approval

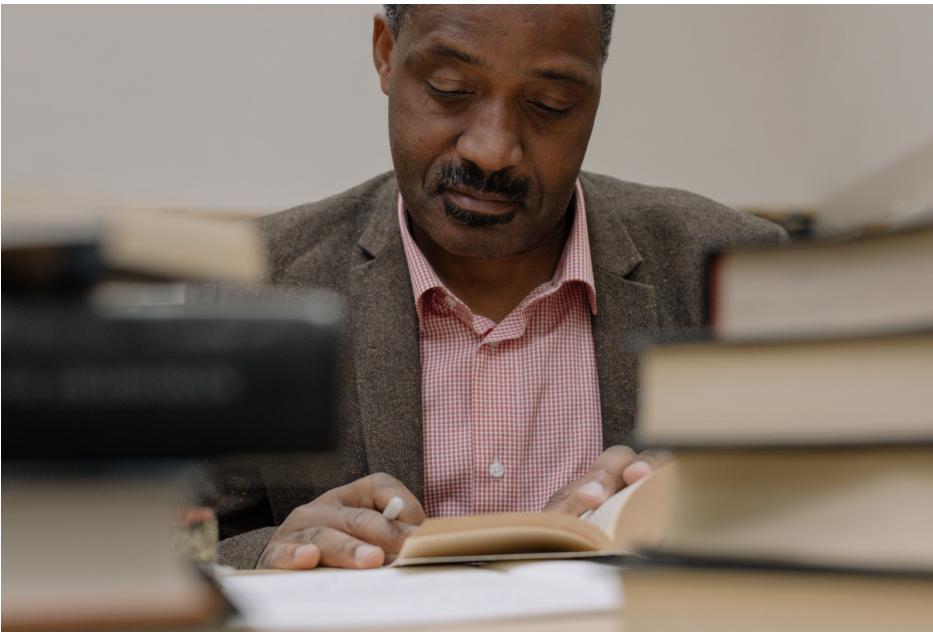
Lit Review Findings

Most of the funding goes to very few Universities

- About 1000 universities claimed R&D expenditures in 2018
- 115 universities conducted 75% of all Federally funded R&D
 - 25 conducted 1/3 of national R&D for \$29 billion
 - % based software subscription would benefit
- Almost 800 universities conduct R&D and may need guidance
 - Flat-fee software subscription would benefit



Personas



Dr. James Carter
Associate Professor
West Virginia State University

"I want to search for grants, go through the application process and have a thorough review of my proposal."

Experience:

Applies for grants every 3-4 months as part of the Agricultural & Environmental Research Station at WVSU. Many grants are brought to him but he would like more tailored grants.

Needs:

A simple solution for finding the niche grants to fund his research within the program at WVSU. He wants to be able to see the "big picture" and drill down when needed.

Wants:

A single source, step by step process for finding and applying to grants. Having an option for consultancy would improve his level of confidence in his presentation.

Personas



Dr. Ramona Bivens
Associate Professor
Texas Southern University

"I want to have a more efficient process. I don't like feeling like I wasted my time."

Experience:

Doesn't apply for grants often and has a hard time finding appropriate grants for her research. Most grant awards have been from internal or non-government agencies.

Needs:

A clear abstract that lets her know quickly that she meets the eligibility criteria. A simple search that provides only grants worth looking at in more detail.

Wants:

Having an applicant profile that could be lined up with grant opportunities would save her time and frustration. Guidance throughout the process until she becomes comfortable with the requirements would relieve a lot of extra tension.

Personas



Dr. Elena Smith
Associate Professor
Brown

"I have to keep the wheels spinning almost constantly. The process does not end.

Experience:

Applies for an average of 10 NIH grants each year. Conducts a few, limited and targeted searches a year. Most discovery is through colleague referrals and ListServs.

Needs:

Saving time and higher levels of success are the greatest needs so that more focus can be on researching. University administration departments currently handle many of the gathering and compliance requirements.

Wants:

Ability to preview all necessary sections and documents, store files in one location and view the proposal as both individual sections and a complete document. Having a centralized storage space for past applications would be beneficial.

Personas



Dr. Javier Corderro - R1
Post-Doc Researcher
University of Central Florida

"I don't want to fail because I missed a form or had too many pages in a section."

Experience:

Beginning to search for his own grants to fund projects with grad students. His mentor will provide guidance but let him learn from his mistakes and failures.

Needs:

A simplified process to understand the requirements, specific guidelines and formatting that need to be followed. Having an order of operations and checklists would increase comfort levels with the process. A timeline and markers will keep him focused.

Wants:

A quick way to sort through the abstracts to ensure that grants align with area of focus. Seeing examples of previous successful grant proposals would also be beneficial.

Participant 1

Associate Professor
University of Baltimore

Searches for grants once every 2 months
Applies for grants 2 times per year

Participant 2

Associate Professor
University of Baltimore

Doesn't search for grants often
Last applied for a grant 8 years ago

Participant 3

Associate Professor
George Mason University

Searches for grants a couple of times per month
Applies for grants 2-3 times per year

Findings / Evaluations

“It’s not like TurboTax, I use TurboTax every year
and this is not like TurboTax at all.

This is a pale copy of TurboTax.”

Findings / Evaluations

The Search

- Unorganized/unsortable lists
- Endless scrolling
- Search results do not affect filters
 - Show which are applicable to results displayed
- Leaving Dashboard clears Search & resets Filters

“Let's hit back, see what I get to.
Oh, I lost everything. Cool.”

The screenshot shows the TurboSBIR application interface. At the top, there is a logo for "TurboSBIR" with the text "powered by OMNISYNC". Below the logo is a sidebar with several navigation items: "Dashboard" (with a bar chart icon), "Grant Search" (with a magnifying glass icon, highlighted in orange), "Grant Preparation" (with a document icon), "Add On Services" (with a puzzle piece icon), "Chat" (with a speech bubble icon), "Manage Team" (with a people icon), and "Build your Business" (with a person icon). To the right of the sidebar is a vertical list of agency names, each preceded by a small square checkbox. The agencies listed are: National Science Foundation, National Institutes Of Health, National Park Service, National Endowment For The Humanities, Bureau Of Justice Assistance, Fish And Wildlife Service, Bureau Of Democracy Human Rights And Labor, Agency For International Development, Department Of Defense, National Institute Of Justice, Office Of Juvenile Justice Delinquency Prevention, Department Of Energy, Bureau Of Land Management, Office For Victims Of Crime, Office On Violence Against Women, and Golden Field Office.

AGENCY	
National Science Foundation	<input type="checkbox"/>
National Institutes Of Health	<input type="checkbox"/>
National Park Service	<input type="checkbox"/>
National Endowment For The Humanities	<input type="checkbox"/>
Bureau Of Justice Assistance	<input type="checkbox"/>
Fish And Wildlife Service	<input type="checkbox"/>
Bureau Of Democracy Human Rights And Labor	<input type="checkbox"/>
Agency For International Development	<input type="checkbox"/>
Department Of Defense	<input type="checkbox"/>
National Institute Of Justice	<input type="checkbox"/>
Office Of Juvenile Justice Delinquency Prevention	<input type="checkbox"/>
Department Of Energy	<input type="checkbox"/>
Bureau Of Land Management	<input type="checkbox"/>
Office For Victims Of Crime	<input type="checkbox"/>
Office On Violence Against Women	<input type="checkbox"/>
Golden Field Office	<input type="checkbox"/>

Findings / Evaluations

The Search

- View More/More Info
 - Redundant yet different information
- Original formatting removed
 - No hierarchy
- No close button on More Info window

“I would like to fire this copywriter into the sun...I don't want to read all this bulls**t...give me the abstract!”

Money Follows the Person Rebalancing Demonstration Program - Capacity Building

Centers for Medicare & Medicaid Services

DEPARTMENT OF HEALTH & HUMAN SERVICES Centers for Medicare & Medicaid Services 7500 Security Boulevard, Mail Stop S2-14-26 Baltimore, Maryland 21244-1850 Disabled and Elderly Health Programs Group September 23, 2020 Dear MFP Grantees: High rates of COVID-19 infection and death among persons residing in nursing facilities and other medical institutions have led to an increased interest in promoting the use of home and community-based services (HCBS) over institutional services in many states. As the primary funder of long-term services and supports (LTSS) nationally, Medicaid can play an important role in supporting states' efforts with LTSS rebalancing, which is commonly defined as achieving a more equitable balance between the share of spending and use of services delivered in home and community-based settings relative to institutional care, where the majority of LTSS had been provided historically. The Centers for Medicare & Medicaid Services (CMS) is issuing this letter to describe a supplemental funding opportunity available to Money Follows the Person (MFP) demonstration states that are currently operating MFP funded transition programs. Supplemental Funding Opportunity under the Money Follows the Person Demonstration For more than a decade, the MFP demonstration has played a key role in many states' LTSS rebalancing efforts. Established by Congress through section 6071 of the 2005 Deficit Reduction Act, MFP provides state Medicaid programs the opportunity to help Medicaid beneficiaries who live in institutions to transition into the community and gives people with disabilities and older adults more choice in deciding where to live and receive LTSS.¹ MFP was designed with four goals: • Increase the use of HCBS and reduce the use of institutionally based services; • Eliminate barriers in state law, state Medicaid plans, and state budgets that restrict the use of Medicaid funds to enable Medicaid-eligible individuals to receive support for appropriate and necessary LTSS in the settings of their choice; • Strengthen the ability of Medicaid programs to provide HCBS to people who choose to transition out of institutions; and • Put procedures in place to provide quality assurance and improve HCBS. 1 More information on the MFP program can be found here: <https://www.medicaid.gov/medicaid/long-term-services-supports/money-follows-person/index.html> Under this supplemental funding opportunity, MFP grant funds are being made available to state MFP demonstrations that are currently operating MFP funded transition programs, for planning and capacity building activities to accelerate LTSS system transformation design and implementation and to expand HCBS capacity. This funding is expected to strengthen focus and attention on LTSS rebalancing among states participating in the MFP demonstration and to support MFP grantees with making meaningful progress with LTSS rebalancing. Examples of activities for which supplemental funding would be available include (but may not be limited to): • Assessing HCBS system capacity and determining the extent to which additional providers and/or services might be needed; • Assessing institutional capacity and determining the extent to which the state could reduce this capacity; • Developing and implementing strategies to reduce institutional bed capacity and transition impacted individuals to more integrated settings; • Engaging stakeholders in system planning, development, and implementation activities. Providers/direct service workers recruitment, education, training, and technical assistance (including grants)

Grant Details

Award Floor: DOS-UKR

Opportunity ID: 331302

Eligible Applicants: Others (see text field entitled "Additional Information on Eligibility" for clarification.)

Description:

will create awareness about the issues of domestic and gender-based violence, create safe environments for victims to report abuses, and assist victims. PAS strongly encourages proposals to include new and effective communication tools and demonstrate a clear target audience. Due to COVID-19, direct personal contact between project implementers and beneficiaries should be limited. Applicants should use online tools for training and meeting with beneficiaries; and visual tools such as billboards, posters, announcements with QR codes, video advertisements (print materials are discouraged). Proposals must identify the project's target audience; concrete and achievable goals and plans to measure progress against these goals; a realistic action plan; and a reasonable cost estimate. PAS strongly supports cooperation between different stakeholders and will give preference to projects that engage state and private institutions to implement the project and ensure its sustainability. Organizations should engage men to change attitudes. Organizations with demonstrated success addressing domestic and gender-based violence will be prioritized. Organizations that are new to this issue will be considered but should work with experienced partners. Ten percent of grant funds may be allocated for administrative needs of the organization during the period of project implementation. Proposals will address domestic and gender-based violence by: Promoting a zero-tolerance attitude toward domestic and gender-based violence Conducting education and public campaigns on the rights of victim as well as their children Reducing stigma toward victims Engaging school kids and youth to raise awareness of these issues in creative ways Linking victims and their dependents to available resources to aid their rehabilitation Organizing cultural/outreach events Establishing networks of peer-to-peer assistance for victims of gender-based violence Engaging police officers to take legal action against abusers. If necessary, conducting training on new Ukrainian legislation on gender-based violence Sharing successful cases to inspire other victims to speak-up and ask for assistance Developing capacity in territorial communities to respond to legal and social challenges Mobilizing local and national influencers to serve as champions to share key messages Identifying innovative, community-led initiatives to scale up through local and national policies

Additional Url: <https://ua.usembassy.gov/education-culture/media-development-fund/>

APPLY FOR GRANT

Findings / Evaluations

The Search

- Chat Icon
 - Poor placement
 - Cannot close, move or reduce
 - Covers the most important button in the entire Search process

“There is a very serious UI problem right there”

“What is this even about?
No. No, no, no, no.
Websites don’t do this, go away.”

Money Follows the Person Rebalancing Demonstration Program - Capacity Building

Centers for Medicare & Medicaid Services

DEPARTMENT OF HEALTH & HUMAN SERVICES Centers for Medicare & Medicaid Services 7500 Security Boulevard, Mail Stop S2-14-26 Baltimore, Maryland 21244-1850 Disabled and Elderly Health Programs Group September 23, 2020 Dear MFP Grantees: High rates of COVID-19 infection and death among persons residing in nursing facilities and other medical institutions have led to an increased interest in promoting the use of home and community-based services (HCBS) over institutional services in many states. As the primary funder of long-term services and supports (LTSS) nationally, Medicaid can play an important role in supporting states' efforts with LTSS rebalancing, which is commonly defined as achieving a more equitable balance between the share of spending and use of services delivered in home and community-based settings relative to institutional care, where the majority of LTSS had been provided historically. The Centers for Medicare & Medicaid Services (CMS) is issuing this letter to describe a supplemental funding opportunity available to Money Follows the Person (MFP) demonstration states that are currently operating MFP funded transition programs. Supplemental Funding Opportunity under the Money Follows the Person Demonstration For more than a decade, the MFP demonstration has played a key role in many states' LTSS rebalancing efforts. Established by Congress through section 6071 of the 2005 Deficit Reduction Act, MFP provides state Medicaid programs the opportunity to help Medicaid beneficiaries who live in institutions to transition into the community and gives people with disabilities and older adults more choice in deciding where to live and receive LTSS.¹ MFP was designed with four goals: • Increase the use of HCBS and reduce the use of institutionally based services; • Eliminate barriers in state law, state Medicaid plans, and state budgets that restrict the use of Medicaid funds to enable Medicaid-eligible individuals to receive support for appropriate and necessary LTSS in the settings of their choice; • Strengthen the ability of Medicaid programs to provide HCBS to people who choose to transition out of institutions; and • Put procedures in place to provide quality assurance and improve HCBS. 1 More information on the MFP program can be found here: <https://www.medicaid.gov/medicaid/long-term-services-supports/money-follows-person/index.html> Under this supplemental funding opportunity, MFP grant funds are being made available to state MFP demonstrations that are currently operating MFP funded transition programs, for planning and capacity building activities to accelerate LTSS system transformation design and implementation and to expand HCBS capacity. This funding is expected to strengthen focus and attention on LTSS rebalancing among states participating in the MFP demonstration and to support MFP grantees with making meaningful progress with LTSS rebalancing. Examples of activities for which supplemental funding would be available include (but may not be limited to): • Assessing HCBS system capacity and determining the extent to which additional providers and/or services might be needed; • Assessing institutional capacity and determining the extent to which the state could reduce this capacity; • Developing and implementing strategies to reduce institutional bed capacity and transition impacted individuals to more integrated settings; • Engaging stakeholders in system planning, development, and implementation activities. Providers/direct service workers recruitment, education, training, and technical assistance (including grants)

Grant Details **Contact Info**

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APPLY FOR GRANT

Findings / Evaluations

“The idea is sound, but I can’t necessarily say that it was too helpful because it feels like a lot of it is un-done”

Findings / Evaluations

The Application

- Grant Strategy as a checklist
 - What documents are required
 - Readiness check is not needed
- Team frame is dysfunctional/limited
 - Copy and paste members
 - Doesn't display members/pending
 - Cannot assign titles
- Get Additional Help/Add On Services
 - Redundant information
 - 2 places with 2 names
- Too much real estate wasted

Group 3 - NIH SBIR workflow

Grant Strategy Contact the NIH Proposal Initiation R&D Plan Letters of Support Budget Admin Final Check

SBIR Grant Strategy

(1) Click on each of the checkboxes to reveal additional information to ensure your strategic fit with the SBIR program
(2) Add internal and external collaborators to your grant project
(3) Get additional support if you lack a certain skill-set on your team.

SBIR Readiness Check

Are you seeking grant money to fund genuine R&D?

Does your R&D plan have sufficient technical risk?

Do you have a strong Principal Investigator who will serve as the technical lead on the project?

Is all your proposed work going to be performed in the US?

Do you have an implementation partner or potential customers who could provide support to your project?

Build your Team

J jaimeyoung51@gmail.com

+ ADD NEW MEMBER

Get Additional Help

Administration and Review

Administration Assistance \$50.00/hr

Grant Review and/or Strategic Consultation \$150.00/hr

Grant Writing Support

Comprehensive \$5000.00

First Draft \$1000.00

Note: For all grant strategy pages: NIH, NSF, Custom: The Applicant Plan includes 1 Grant Review and 2hr of Strategic Consulting time per month.

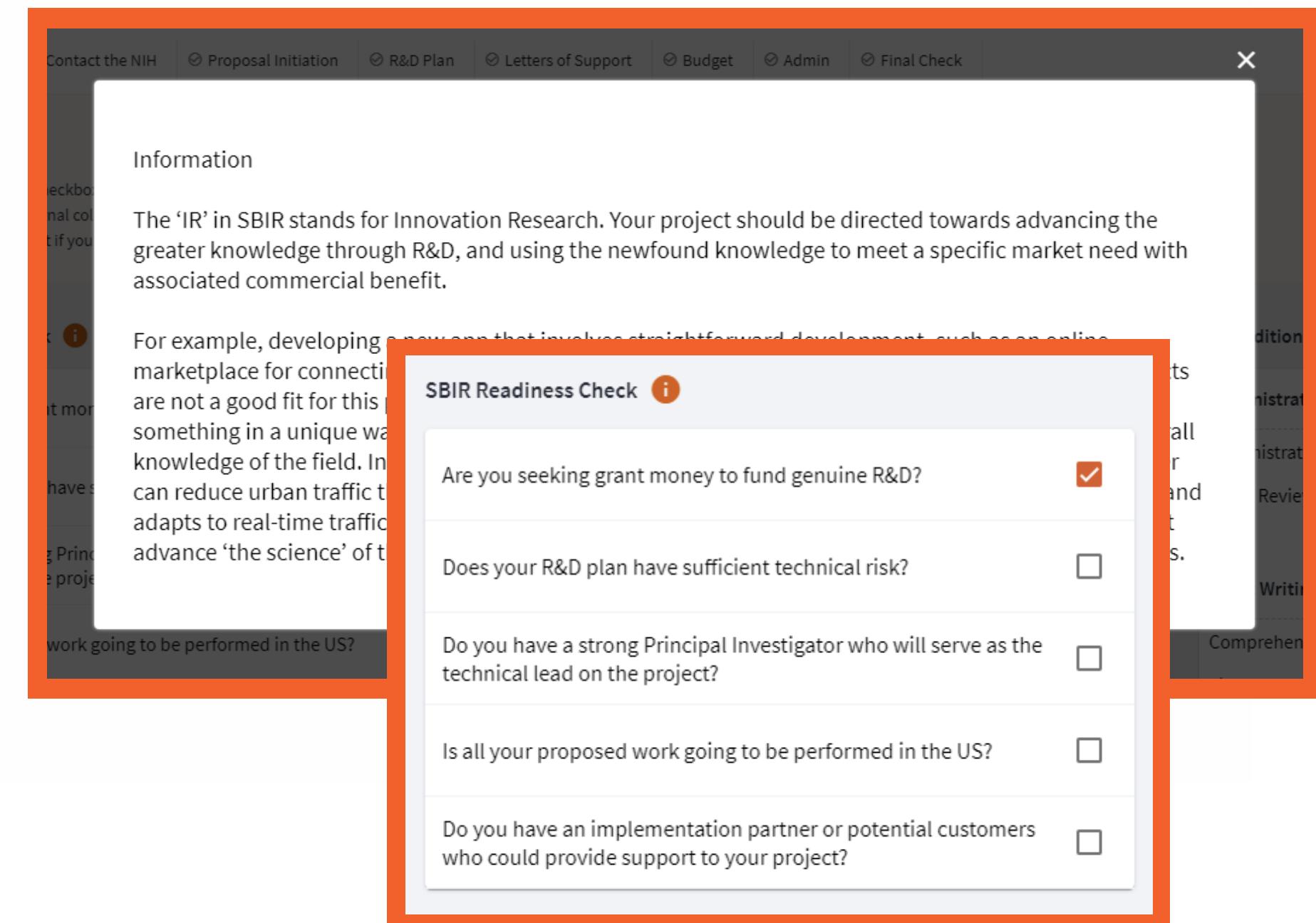
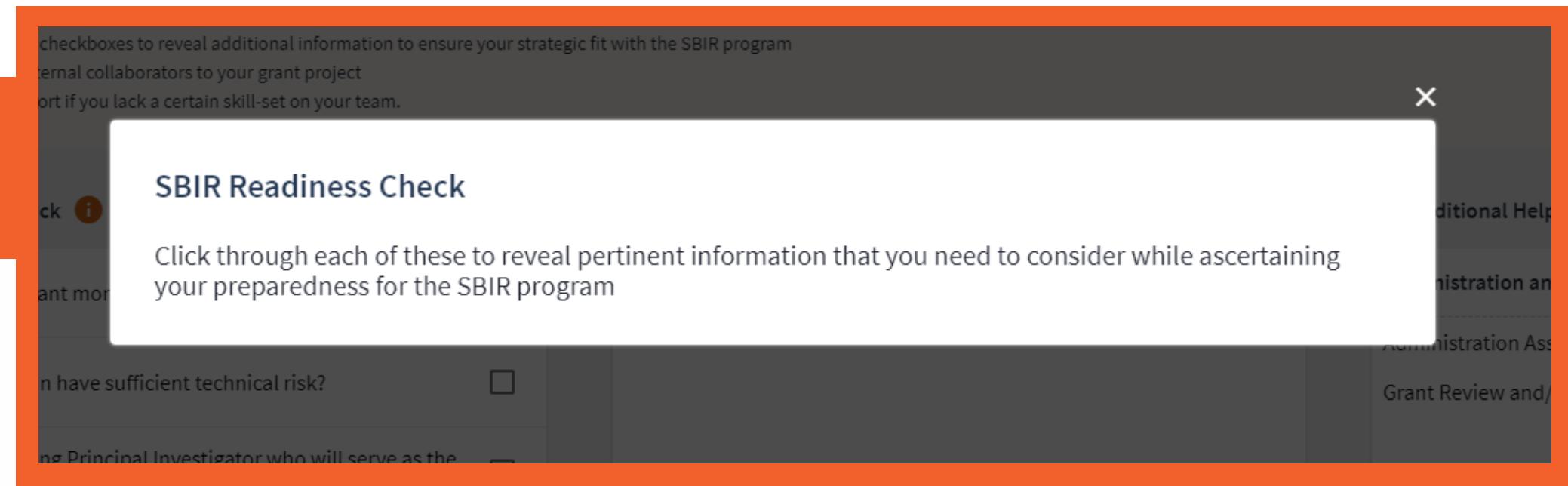
“Here, in Strategy, it should be really clear about, I have a lot of work to do at this point. And then as you do them, keep coming back.”

Findings / Evaluations

The Application

- Rely on conventions
- Simple info and tips as rollovers
- New windows for file previews
- Checkboxes shouldn't open windows

"If you're going to walk me through it,
I need to actually be walked.
This is a bit like the site is walking
behind me and shoving me."



Findings / Evaluations

The Application

- Help with the process isn't helpful
 - Need more advice along the way
 - Encouragement at each step
 - Talk to me like I am five.
- Provide a step by step breakdown
- It appears to be built for users that have completed the process

The screenshot shows the TurboSBIR application interface. On the left, a sidebar menu includes options like Dashboard, Grant Search, Grant Preparation (which is selected), Add On Services, Chat, Manage Team, and Build your Business. The main content area is titled "Group 3 - NIH SBIR workflow". A blue box highlights the "Specific Aims (1 Page)" section, which contains instructions to state concisely the goals of the proposed research and summarize the expected outcome(s). Another blue box highlights the "Research Strategy (6 pages)" section, which is divided into three numbered steps: 1. Significance, 2. Innovation, and 3. Approach. Each step has detailed instructions. A red border surrounds the entire content area. A blue circle highlights the close button in the top right corner of the main window. A blue line highlights the bottom edge of the main content area. A blue icon with a red notification dot is visible in the bottom right corner of the main window.

Specific Aims (1 Page)

State concisely the goals of the proposed research and summarize the expected outcome(s), including the impact that the results of the proposed research will have on the research field(s) involved.

List succinctly the specific objectives of the research proposed (e.g., to test a stated hypothesis, create a novel design, solve a specific problem, challenge an existing paradigm or clinical practice, address a critical barrier to progress in the field, or develop new technology).

Research Strategy (6 pages)

1. Significance

Explain the importance of the problem or critical barrier to progress that the proposed project addresses.

Describe the scientific premise for the proposed project, including consideration of the strengths and weaknesses of published research or preliminary data crucial to the support of your application.

Explain how the proposed project will improve scientific knowledge, technical capability, and/or clinical practice in one or more broad fields.

IMPORTANT - Explain the project's potential to lead to a marketable product, process, or service.

2. Innovation

Explain how the application challenges and seeks to shift current research or clinical practice paradigms.

Describe any novel theoretical concepts, approaches or methodologies, instrumentation or interventions to be developed or used, and any advantage over existing methodologies, instrumentation, or interventions.

Explain any refinements, improvements, or new applications of theoretical concepts, approaches or methodologies, instrumentation, or interventions.

3. Approach

Describe the overall strategy, methodology, and analyses to be used to accomplish the specific aims of the project. Describe the experimental design and methods proposed and how they will achieve robust and unbiased results. Include how the data will be collected, analyzed, and interpreted, as well as any resource

“This is making me feel right now like I should have had all this stuff done already and then I upload it. Like this is the last stage.”

Findings / Evaluations

“Unfortunately, in your training process...you don’t see a lot of this type of material that much...

Having some examples would have been super helpful.”

Findings / Evaluations

The Application

- Process Overview & Walkthrough
- It needs to be consistent with the specific format requirements of each agency
- Vital instructions buried in Samples and Templates menu

The screenshot shows a software application window titled "Grants > Group 3 - NIH SBIR workflow". At the top, there is a navigation bar with several tabs: "Grant Strategy", "Contact the NIH", "Proposal Initiation", "R&D Plan" (which is highlighted in orange), "Letters of Support", "Budget", "Admin", and "Final Check". Below the navigation bar, there are five sub-tabs: "Specific Aims", "Research Strategy", "Summary", "Narrative" (which is also highlighted in orange), and "References". The main content area is titled "Project Narrative (3 Sentences)" and contains a large text input field. Below this, there is a "Samples and Templates" section with a list of documents: "Budget_Preparation Instructions.pdf", "RR_Budget_1_4-V14.pdf", and "RR_Budget_1_4-V14_SubAward (if Applicable).pdf". To the right of this list, a modal window is open, showing a preview of one of the template documents. This modal window has a red border and a blue circle drawn around its left side. The modal content includes sections like "Budget Type", "Who to include in A. Beneficiary Person", "Do not list details of collaborators at other institutions here", "B. Other Personnel", and "C. Equipment". At the top right of the modal, there is a user icon labeled "J" and a status message "1 connected user (me)".

“...You asked what I would most want from a piece of software and this is literally it. Conceptually I am into all of this. The idea works.”

Findings / Evaluations

The Application

- Samples & Templates popup windows
 - Non-scalable widths
 - Unclear that hamburger closes page preview pane
 - Too small to view well
 - Responsive design would limit preview sizes further

Group 3 - NIH SBIR workflow

Grant Strategy Contact the NIH Proposal Initiation R&D Plan Letters of Support Budget Admin Final Check

Specific Aims Research Strategy Summary Narrative References

Specific Aims (1 Page) i

Samples and Templates

Budget Budget Justification

Budget Preparation Instructions.pdf

RR_Budget_1_4-V1.4.pdf

RR_Budget_1_4-V1.4_SubAward (if Applicable).pdf

Upload Documents

Requested Salary (i)

Budget Justification

Both primary applicant and sub-awardee should fill out the budget forms separately. Below are some pointers on some of the aspects of budget preparation (most from the F420). You will have to fill out all required sections on the NIH Form A of the Checklist first.

Budget Type: Both the budget being requested is for the primary applicant organization. Subaward/Consultant: The budget being requested is for subaward/consultant organization(s). Note: resource budgets are required only for subaward/consultant organizations that perform a substantial portion of the work. If your institution is performing a substantial portion of the work, enter the PI's Subaward/Consultant/Contractor Costs and in the prime's Section L, Budget Justification.

A. SeniorKey Person: Include the names of seniorkey persons of the applicant organization (or organization leading the component of a multi-award application) who are involved in the project in a substantive way. Include the estimated percent of time spent by each seniorkey person on the project. If there are no seniorkey persons, enter "None".

Correspondents designated as seniorkey persons in the SeniorKey Person Profile Form can be included in the "A. SeniorKey Person" section only if they are also employees of the applicant organization. Otherwise, connect them to the "B. Other Personnel" section in Question 6 of the Form.

Who not to include in A. SeniorKey Person: Do not list titles of collaborators at other institutions here, as they will be printed in the Subaward Budget for your institution. Do not list titles of other significant contributors who are not contributing any specific measurable effort to the project. If you are listing other significant contributors, enter their names in the "B. Other Personnel" section in Question 6 of the Form.

Meant (Cal-Acad-Rent): Use and enter the concept of "person month" as a metric for determining percent of effort. For more information about calculating person months, see NIH's Frequently Asked Questions on [Person Months](#).

Identify the number of months the seniorkey person will devote to the project in the applicable box (e.g., calendar, academic, or summer months).

Use either calendar months OR a combination of academic and summer months. Measurable effort is required for every seniorkey person entry.

If effort does not change throughout the year, it is OK to use only the calendar months column.

However, if you may use both the academic and summer months columns, your individual business plan may require both columns. If your institution uses a 9-month academic period and a 3-month summer period, leave the calendar months column blank and use only the academic and summer months columns.

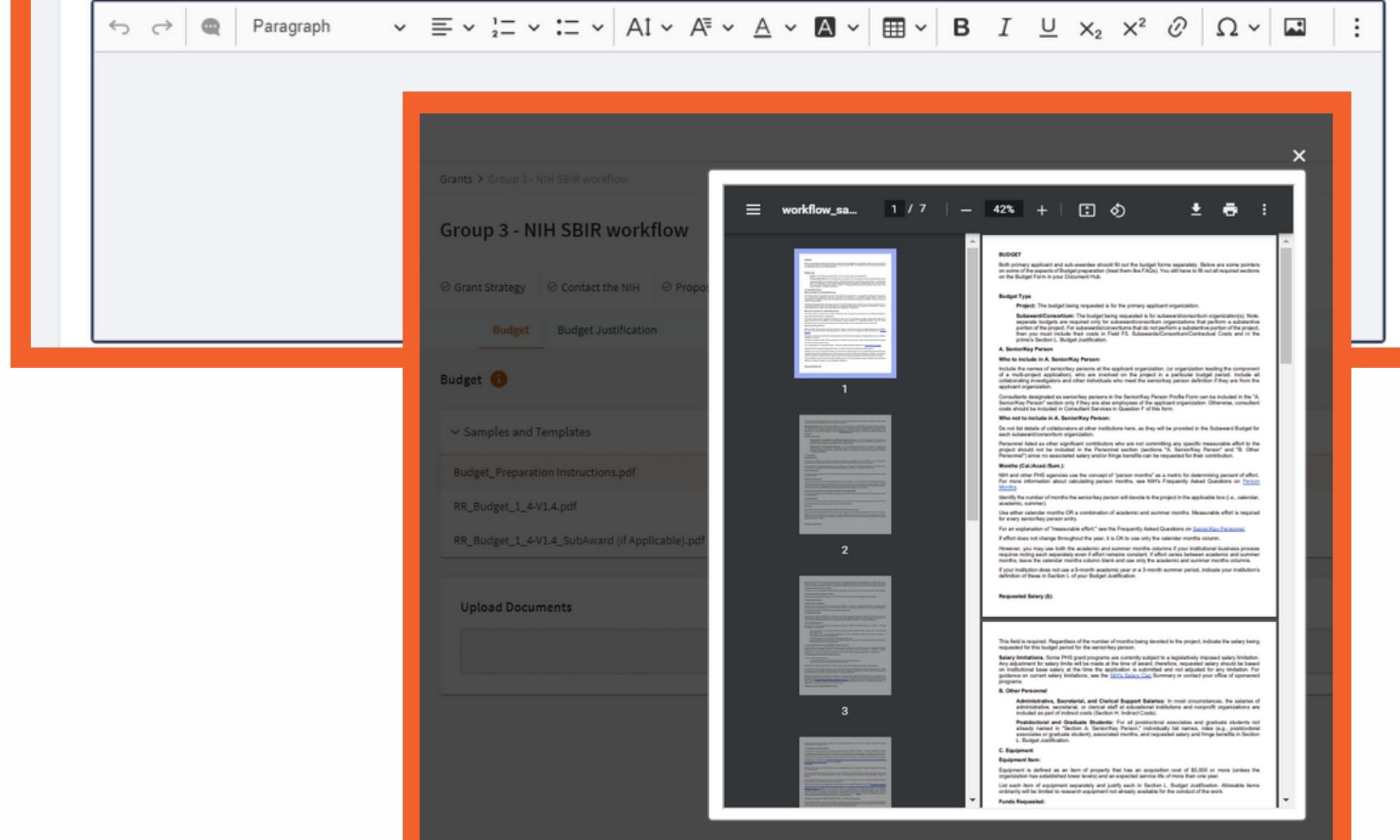
If your institution does not use a 9-month academic or a 3-month summer period, indicate your institution's definition of these in Section L, Budget Justification.

B. Other Personnel: Administrators, Secretaries, and Clerical Support Staff: In most circumstances, the salaries of professional staff, secretaries, and clerical support staff are not included in the budget. For professional associates and graduate students not already named in "Section A. SeniorKey Person," individual last names, ranks (e.g., postdoctoral associate), titles, and salary amounts should be listed in Section L, Budget Justification.

Equipment: Equipment is defined as an item of property that has an acquisition cost of \$5,000 or more (unless the equipment is part of a larger item). Equipment includes computers, furniture, fixtures, and other items used in the conduct of the work.

List each item of equipment separately and justify each in Section L, Budget Justification. Allowable items generally will be limited to research equipment not already available for the conduct of the work.

Forces Requested:

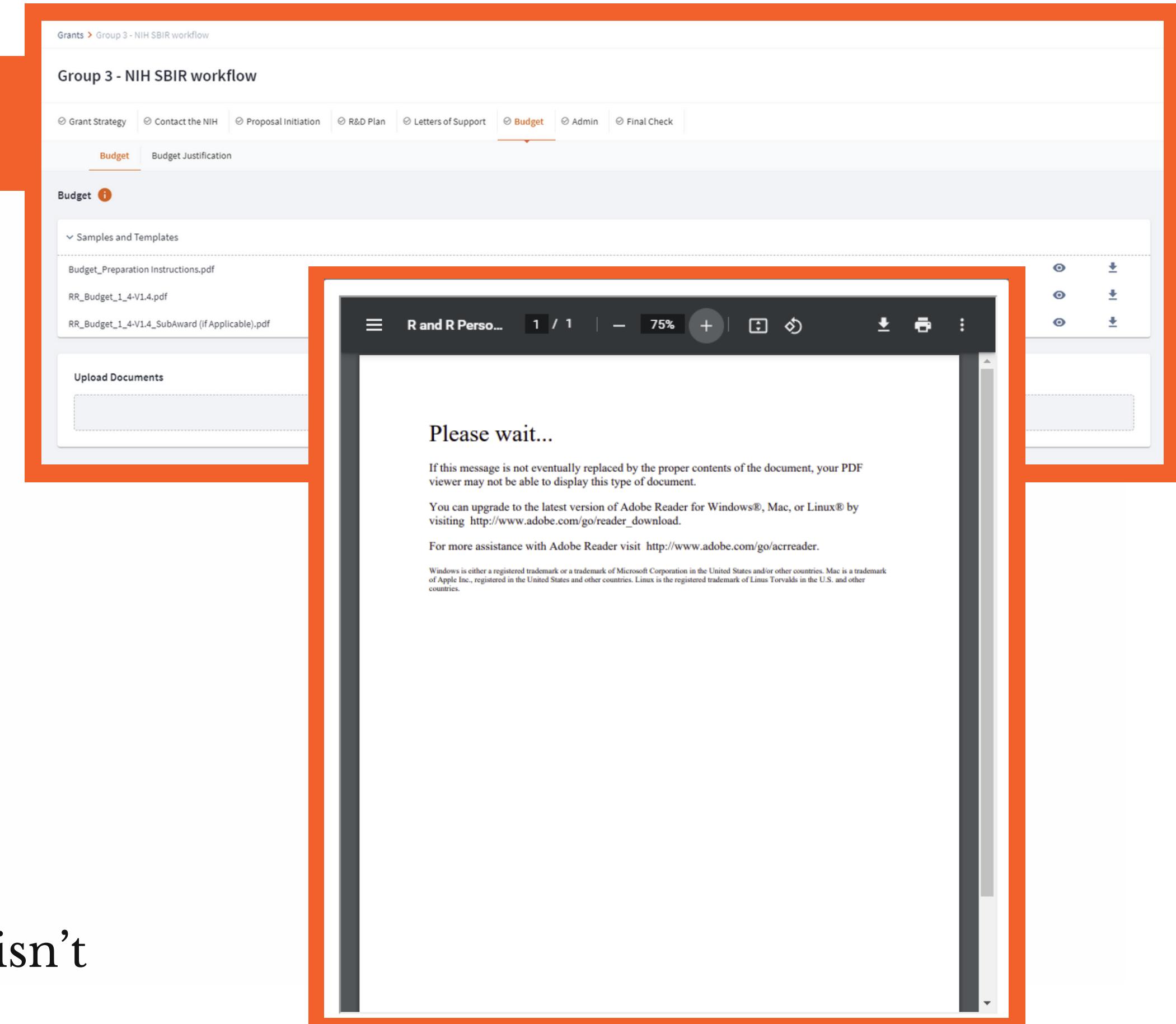


“These can get really long...It would be cumbersome to have to look at this much of it at a time.”

Findings / Evaluations

The Application

- Limited flexibility locating, previewing, and downloading documents
- Samples & Templates should be hotlinks or rollovers
- Word files auto download on preview
- Files with error messages

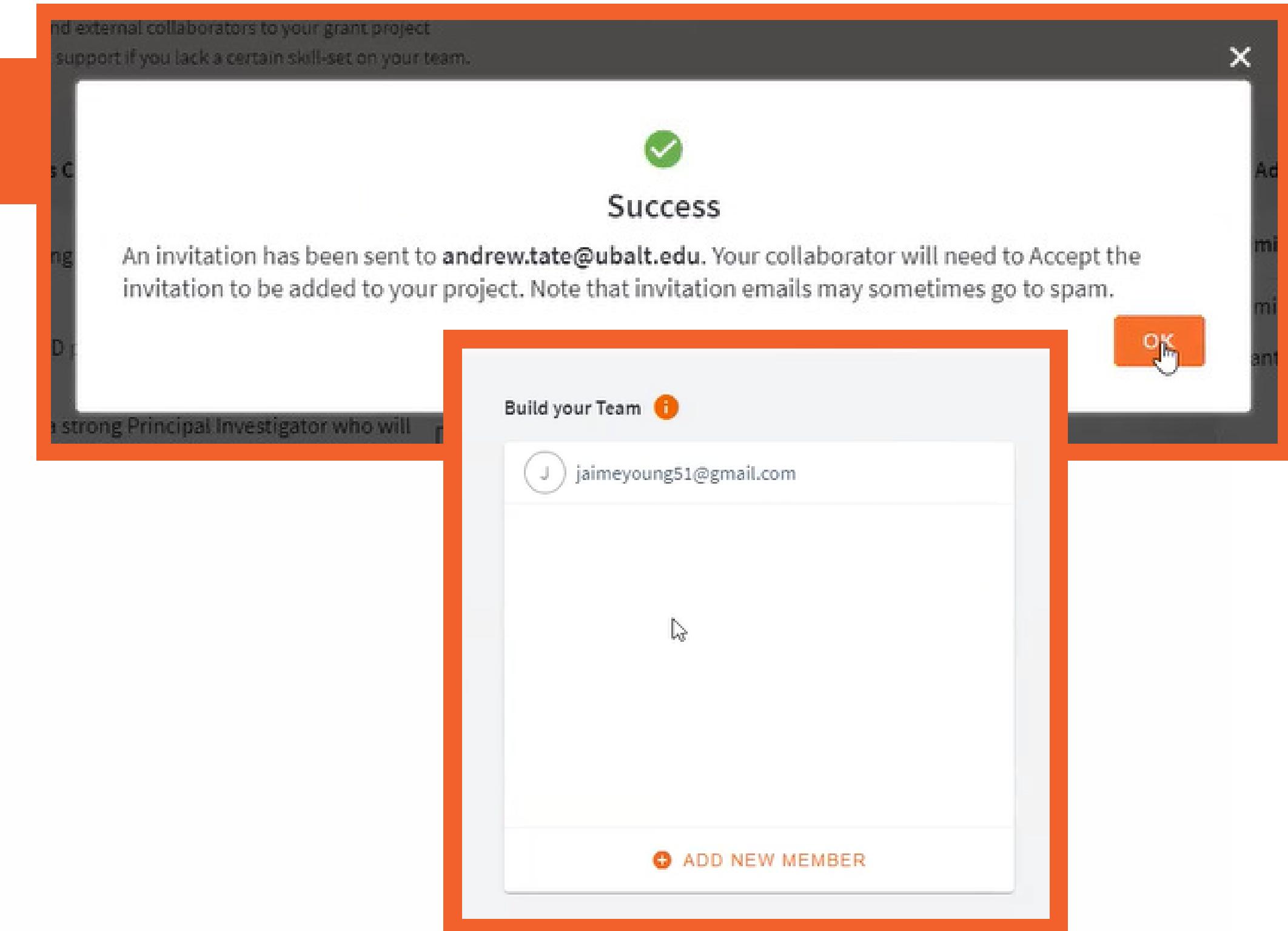


“It has a very strong feeling of ‘This isn’t done’...this feels like a prototype.”

Findings / Evaluations

The Team

- Team members are not updated as they are added
 - Names are shown only when emails have been accepted
 - Needs to show members and their status
- Cannot copy & paste emails
- No option for assigning titles



“Faculty members...can be sticklers about titles...1, they’re people who collect titles, and 2, they do sort of make a difference on...your promotion and tenure.”

Recommendations

Search Recommendations

- Organization of filters
 - Sortable tree, alpha, etc.
 - Agency groupings by type
- Do not clear filters or search info when the search page is left
- Search results activate filter checkboxes
 - Ability to further reduce results by unchecking boxes
- Reset should not change Open Grants status
- Results should be viewable more than 5 at a time

Recommendations

Interface Recommendations

- Ability to view more than 5 results on a page
- Rollover info for several items, remove "i" icon on others
- Not everything needs to open in a new window
 - View More and More Details are not necessary
 - More Details should not open a partial window
 - Proof the abstracts (missing spaces between words)
 - Format grant information
- Move and reduce the size of the chat widget

Recommendations

Workspace Recommendations

- Data entry field looks like a notes window
 - Make available as pop-out or new window
 - Needs to be able to zoom in and out
 - Increase width of field
- Outline the process
 - Tabs do not show entirety of the process
 - Show steps in list/tree format

Recommendations

Grant Preparation Recommendations

- Label things consistently
 - Get Additional Help/Add-On Services - 2 names/2 access points
- Readiness Check and Get Additional Help take up too much space
- Build Your Team needs to allow for roles and titles to be assigned
- Create an academic research option under the eligibility category
- Summarize the abstract for grants

Recommendations

Walkthrough for Requirements by Agency

- Checklist of documents and forms needed
- List of requirements, ie. formatting, length, spacing
- Toggle for more or less information and support from rollovers
 - Regular Grant Writer - let me do my thing
 - Infrequent Grant Writer - teach me like I'm 5
- Reduce number of clicks needed to unlock information

Recommendations

Tone and Explanations

- More formal presentation of information
- Encouragement along the path towards completion
 - My Fitness Pal over TurboTax
- Checklist and Success markers for completed sections

“...it’s a little too flippant, too cheeky for probably the most stressful part of my career.”

Next Steps

Low Fidelity Wireframing & Prototyping

- Based on our findings and recommendations
- Iteration and Usability Testing

High Fidelity Prototyping

- Based on our findings and recommendations
- Usability Testing

Appendix

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Questions & Comments