

# Does **fund-raising** have to be a **hell-raising** experience?

Research funding is increasingly allocated on a competitive basis. Generating such funds can be regarded as a chore by academics but, as **Aaron Chassy** argues, following certain guidelines can make the process more enjoyable – and increase the chances of success.

I remember the workshop where I first heard the term “fun-raising” coined to describe proposal writing. Ten years and several winning proposals later, I have to admit that proposal writing can be fun. It is an opportunity to present your ideas convincingly and creatively, but there are some fundamentals which you need to respect to be successful.

## Know your client

One of the stock phrases of marketing is to “know your client,” and proposal writing, which is a form of direct marketing, is no different. A well-written proposal responds to the client’s basic question: “How do I do this, do it well, and do it cost-effectively?”

To respond credibly, you must first read the evaluation criteria, which clearly indicate what the client needs to see in the proposals submitted. Generally, these components include, but are not limited to, the technical approach, the organisation’s past performance and current capacity to implement such projects, the management approach, and the individuals proposed for key positions on the implementation team. Sometimes the set of evaluation criteria will even include percentages or weights to signal the relative importance of each component. You should treat these evaluation criteria as section headings for your proposals, in the same order as presented in the tender, and then determine the number of pages to be allocated to each section by multiplying the percentages assigned by the maximum number of pages allowed. For example, if the technical approach has a 50% weight in a 30-page proposal, you should devote no more and no less than 15 pages to this section.

Beyond that there are three basic

approaches to proposal writing. The first involves a somewhat nuanced regurgitation of the client’s statement of work. It is safe, conservative, and most appropriate when the scope of work is overly detailed and prescriptive. The winner of such a tender will be expected to implement mechanically and unquestioningly, and there is very little room for providing value added through either creativity or innovation.

In the second approach, you try to engage the client in a dialogue to ascertain its preferences. Rules pertaining to most competitive tender processes often forbid the client from giving anyone information that may constitute an unfair competitive advantage. However, it is entirely possible to research other, similar projects undertaken by the same client to draw some inference on general approaches taken while making minor tweaks and adapting them to the specific implementing environment.

The final approach is more proactive and requires that you begin well before the tender is ever published. By anticipating the client’s funding and planning cycles, you can target your marketing efforts to coincide with the client’s programme development process. You can potentially assist the client in defining its needs by preparing short concept papers, which the client can integrate into its programme development efforts. The client may even ask for more elaborate submissions, which it may integrate into the statement of work for upcoming tenders. Thus, this approach places you at a competitive advantage to other potential tender respondents, since you will ideally be responding to many of your own ideas.

## Share the wealth (of labour)

Writing a full-blown proposal can be an

enormously complex undertaking, but it can be made a lot easier by setting up teams and using simple systems that designate roles, responsibilities, and authorities. Too often when one or a few individuals wear too many hats in the proposal writing process, there is neither time nor incentive to monitor the quality of the work for clarity and consistency. There are many systems to choose from, but most include the following roles, which are indispensable in the proposal development process:


The **proposal manager** assumes ultimate responsibility for the final product, merging individual team members’ contributions in a way that makes the whole greater than the sum of its parts. She is the ultimate arbitrator in resolving any differences between competing ideas and approaches to the proposal, working closely with team members to help draw out the win themes. Win themes are simply aspects of the organisation, its technical approach or personnel that distinguish it from its competitors.

The **technical writer** is the content provider. While he should be well versed in the technical substance of the tender’s work, he must also be able to organise and distill his knowledge so that the proposed technical approach will clearly achieve the tender’s stated objectives.

The **proposal coordinator** essentially serves as the traffic cop, reminding team members to produce their assigned inputs on time. To reduce confusion, she also serves as a gatekeeper; the sole conduit for all inputs submitted to the proposal manager for integration into the proposal drafts.

## A proposal that only a mother could love

Proposal writing is intense. It integrates and synthesises an enormous amount of material in a condensed time. Inevitably, the team will develop high levels of attachment to their work, so it is invaluable



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to submit proposal drafts to a panel, comprised of colleagues who can objectively and capably determine whether the proposal team has managed to get all of its ideas onto paper clearly, coherently, and convincingly. One of my former supervisors used the litmus test of whether or not her octogenarian mother could understand a proposal. While that's certainly one approach, another, more realistic one is for the panel to role-play the client's evaluation committee, including and displaying all of the client's prejudices, preferences, and pet peeves.

Finally, a proposal should read more like a popular magazine article than an academic journal. Remember, technical evaluators will usually have a lot of proposals to review, and they are unlikely to read any of the proposals from cover to cover. It is important that the proposal be an easy read visually as well. Depending on the proposal instructions in the tender, you may want to add some graphics, use bullet points and columns, and anything else to simplify the reader's job of getting through your proposal as efficiently as possible.

Many development professionals dread the words "tender due", but that fear is misplaced and has more to do with past experiences of poorly managed proposal development processes. With some forward-looking research, pro-active marketing, and development of simple systems, there is absolutely no need for proposal writing to be such a nightmare. Not only can it be fun but it can also be incredibly satisfying: it will provide you with a unique opportunity to fashion innovative solutions to complex challenges while creating public value. **RG**

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