Proposal Development

The Shipley Proposal Process

The Shipley Proposal Process is a business development tool used in proposal development. The full seven phase, 96-step process can be found here: http://sbdl.shipleywins.com/. This guide will summarize key points relevant to the development of a Phase Two IDEAS Grant Proposal, which is situated with Phases 4 and 5: Proposal Planning and Development.

Phase 4: Proposal Planning

Kick-off Meeting

- Goal: To have a common understanding of the proposal team, the solicitation requirements, the calendar, and identify issues of concern
- Kick-off includes:
    o Program Team
    o Business Development Team
    o Partners: Finance, Human Resources, Compliance, Monitoring & Evaluation
- To-do:
    o Assign roles:
        ▪ Proposal Manager: manages the full proposal process
        ▪ Design Lead: responsible for overall technical design and strategy of the proposal
        ▪ Writer: responsible for the technical draft, ensuring a clear and compelling proposal
        ▪ Design Team: contribute specific technical or geographic expertise
        ▪ Budget Lead: responsible for the cost proposal, develops a competitive and compliant cost strategy
        ▪ Cost Translator: works with Design and Budget teams to ensure planned activities are accurately reflected in the budget.

Initial Design Meeting

- Goal: Seeks to identify contextual elements, outline approach, and develop activities to facilitate budgeting
- Topics to cover:
    o Partnering decisions: who else will be involved in the project?
        ▪ Ex. Third-party providers, international partners, on-campus partners
    o Analyzing the donor and other stakeholders
    o Theory of Change
    o Approach to the Request for Proposals
    o Activities
    o Staffing Plan

Phase 5: Proposal Development

Iterative Design Meetings

- Following the initial design meeting, the proposal team will begin developing a draft of the proposal and its attachments. Iterative design meetings should take place throughout the initial proposal development process.
- Goal: revisit design ideas to ensure the ideas are clear and make sense; incorporate reviewer comments
- Can add partners into the conversation

Pink Team

- First draft of the narrative is shared
- A detailed outline in paragraph form
- The review focuses on design logic and feasibility
- Takes place 2-3 weeks after kick-off meeting

Red Team

- Second draft of the narrative is shared
- This draft is more complete, but the wording may not be finalized
- The review focuses on how well the idea is sold and communicated
- Takes place halfway between kick-off and submission date, approximately two weeks after the Pink team meeting if possible

Green Team

- Budget review managed by the Budget Lead
- Provides a space to ask questions about costs and ensure compliance
- Takes place one week after the Red Team

Gold Team

- Final review of the proposal
- The focus is ensuring that the narrative has adequately incorporated changes suggested during the Red Team meeting
- Takes place 2-5 days before submission

Packaging

- Assign one person to compile all elements of the proposal, ensure formatting is consistent and page limits are respected
- Ensure compliance with all grant requirements
- Build plenty of time for this process into the proposal development calendar

Final Sign off

- Review of submission-ready document
- Focus is a 'print check' to ensure the full proposal is prepared for submission
- Takes place 1-2 days before submission