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**CREATING A PROJECT WORK PLAN**

Crafting a competitive proposal for external funding requires that a “great idea” be transformed into a great research project. Creating a work plan is a very effective way to think through your great idea and operationalize the research you want to conduct, whether a single project or multi-year research agenda. By **thoughtfully and strategically identifying the purpose and scope of your research – and the resources necessary for success** – identifying potential funders becomes much easier and adjustments can be made to the work plan to fit the budget and project duration parameters of a specific call for proposals.

C**reating a work plan should be the first task you undertake when beginning to develop your research project or agenda.** As you create the work plan, stay focused on the research you want to conduct; in other words, don’t allow your thinking to be constrained by a particular call for proposals. **Always start with what you want to do, what you are passionate about… then apply strategic considerations to what funders are funding** as well as the research necessary to address significant problems and gaps in your field.

To start, **focus on the “so what?”** of your project; that is, articulate **why a funder should invest in you and your research**:

* What significant problem and/or gap does your research address?
* How does your project address that problem/gap? (this is not a description of the project; instead, focus on expected outcomes)
* How is your project different from what has already been done? How is it innovative?
* Who will benefit from your project, both directly (e.g., participants; you, as a researcher; your department and college) and indirectly (e.g., Texas Tech, local schools, targeted population, the state/nation/world)?
* What is the broader impact of your research (e.g., filling gaps in the literature, informing policy and practice; changing the world… think grandiosely!)?

Addressing these “so what?” questions will help you **generate and refine your research questions**, which will then drive the operationalization of your project – the **related objectives and key actions will define its scope of work and identify the resources (expertise, time/effort, other direct costs) required for success**. This information is then used to identify collaborators with the expertise necessary to finalize the work plan; develop the research methodology, project timeline, and budget/budget justification; and begin drafting the **concept paper**.

As you develop your work plan, please work with an RDT member or your college’s grant writer who can help conceptualize your research to optimize its fundability and complete the work plan template.

Finally, please note that this template is a guide, a starting point for operationalizing your research project. Adjust the template as necessary to make it work for you. And, since the work plan is a working document, perfection is not required. Provide enough detail to accurately describe the scope of work and required resources, and then move on to crafting your concept paper.

**<*INSERT PROJECT NAME*> WORK PLAN**

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| **What significant problem/need does your project address?** |  |
| **How does your project address the problem/need?** |  |
| **How is your project innovative?** |  |
| **Who will benefit from your findings?** | **Directly:** |
| **Indirectly:** |
| **What is the broader impact of your research?** |  |

**Research Question #1:**

**Research Question #2:**

**Research Question #3:**

**Goal #1: *<insert project name>* findings will be widely disseminated to interested audiences (researchers, practitioners, policymakers)**

*This goal should be included in all research projects and*

*this work plan template has been pre-populated with example objectives and key actions.*

**Research Question #1:**

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| **Objective 1.1:** |
| **Key Action** | **Timeframe** | **Direct Costs****(e.g., data, stipends, supplies, travel)** | **Milestone** | **Personnel****(use to generate****time allocation/effort)** | **Comments** |
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| **Objective 1.2** |
| **Key Action** | **Timeframe** | **Direct Costs****(e.g., data, stipends, supplies, travel)** | **Milestone** | **Personnel****(use to generate****time allocation/effort)** | **Comments** |
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| **Objective 1.3** |
| **Key Action** | **Timeframe** | **Direct Costs****(e.g., data, stipends, supplies, travel)** | **Milestone** | **Personnel****(use to generate****time allocation/effort)** | **Comments** |
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**Research Question #2:**

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| **Objective 2.1:** |
| **Key Action** | **Timeframe** | **Direct Costs****(e.g., data, stipends, supplies, travel)** | **Milestone** | **Personnel****(use to generate****time allocation/effort)** | **Comments** |
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| **Objective 2.2** |
| **Key Action** | **Timeframe** | **Direct Costs****(e.g., data, stipends, supplies, travel)** | **Milestone** | **Personnel****(use to generate****time allocation/effort)** | **Comments** |
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| **Objective 2.3** |
| **Key Action** | **Timeframe** | **Direct Costs****(e.g., data, stipends, supplies, travel)** | **Milestone** | **Personnel****(use to generate****time allocation/effort)** | **Comments** |
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**Research Question #3:**

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| **Objective 3.1:** |
| **Key Action** | **Timeframe** | **Resources/Budget****(e.g., data, stipends, supplies, travel)** | **Milestone** | **Personnel****(use to generate****time allocation/effort)** | **Comments** |
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| **Objective 3.2** |
| **Key Action** | **Timeframe** | **Resources/Budget****(e.g., data, stipends, supplies, travel)** | **Milestone** | **Personnel****(use to generate****time allocation/effort)** | **Comments** |
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| **Objective 3.3** |
| **Key Action** | **Timeframe** | **Resources/Budget****(e.g., data, stipends, supplies, travel)** | **Milestone** | **Personnel****(use to generate****time allocation/effort)** | **Comments** |
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**Goal #1: *<insert project title>* findings will be widely disseminated to interested audiences (researchers, practitioners, policymakers)**

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| **Goal Objective 1.1. Publish Findings in Peer-Reviewed Journals** |
| **Key Action** | **Timeframe** | **Direct Costs****(e.g., data, stipends, supplies, travel)** | **Milestone** | **Personnel****(use to generate****time allocation/effort)** | **Comments** |
| 1. Identify targeted journal(s) and lead author (s)
 |  |  | List of targeted journal(s) | Research Team |  |
| 1. Prepare manuscript(s)
 |  | Draft, review, edit, repeat | Manuscript drafts | Research Team |  |
| 1. Submit manuscript(s)
 |  | Publication fee(s) | Final manuscript draft | Author(s) | Build cost into proposal budget, if allowable |
| **Goal Objective 1.2. Present Findings at Conferences** |
| **Key Action** | **Timeframe** | **Direct Costs****(e.g., data, stipends, supplies, travel)** | **Milestone** | **Personnel****(use to generate****time allocation/effort)** | **Comments** |
| 1. Identify targeted conference(s) and presenter(s)
 |  |  | List of targeted conference(s) | Research Team |  |
| 1. Prepare presentation(s)
 |  | Draft, review, edit, repeat | Drafts of posters, white papers, PowerPoint slides | Presenter(s) |  |
| 1. Present at conference(s)
 |  | Travel costs | Final presentation materials | Presenter(s) | Build cost into proposal budget, if allowable |
| **Goal Objective 1.3. Disseminate Findings using Other Communication Vehicles (e.g., practitioner magazines, media, testimony)** |
| **Key Action** | **Timeframe** | **Direct Costs****(e.g., data, stipends, supplies, travel)** | **Milestone** | **Personnel****(use to generate****time allocation/effort)** | **Comments** |
| Identify targeted audiences and communication vehicles |  |  | List of targeted audiences/vehicles | Research Team | e.g., C&I Chair for possible changes to elementary teacher prep, TEPSA, math teachers org |
| Prepare communications |  |  | Drafts | Author(s) |  |
| Communications presented/published |  |  | Final versions | Author(s) |  |