INFOREADY PEER SPOTLIGHT WEBINAR:

The Essential Tool for Limited Submissions Programs

Summary

In this insightful peer spotlight session, Carlos Moncada introduces a panel of research development professionals from various universities to discuss their roles in managing limited submissions. The panelists, including Alyssa von Leiman-Lopes from Colorado School of Minds, Jalon Martin from Rice University, Gabriella Keanaaina from Texas A&M University, and Kendra Hillman from Arizona State University, share their experiences and strategies in handling limited submissions at their respective institutions. They delve into the growth and challenges in the field, methods for finding and promoting funding opportunities, and the review processes they employ. The session concludes with an engaging Q&A segment where the panelists address audience questions, providing valuable insights into managing limited submissions effectively.

Transcript

Introduction of Panelists

Carlos Moncada: I would like to introduce the panelists. I have bios that I will read for each panelist, and bear with me as I run through these really quickly. First, I'd like to introduce Alyssa Von Lehman-Lopez. She's the Research and Proposal Development Manager at Colorado School of Mines. Alyssa provides proposal management and writing support, analyzes and communicates funding opportunities, manages faculty professional learning, and manages internal competitions. Prior to joining Mines in 2022, Alyssa was a Grants Officer at the Denver Museum of Nature and Sciences. Prior to that, she worked in the Office of Sponsored Research at Metropolitan State University of Denver. We're happy to have Alyssa here today.

Next on screen, Jalon Martin from Rice University. Jalon serves as the Coordinator of Research Development in Rice University University's Office of Research Development Services. He specializes in the organization of the limited submission process and broadcasting federal and state funding opportunities to the campus. Jalon's background is in cognitive and computational neuroscience from his time at Michigan State University and business administration from Prairie View A&M University. His experience also includes coordinating medical research as well as academic support services for students. I also found out that Jalon and I are from the same hometown, so that's pretty cool.

Next, we have Gabriella Keanaaina. Gabriella manages limited submissions at Texas A&M University, collaborating with sponsors, system members, and then investigators to streamline the submission process and enhance research opportunities. Previously, Gabriella was an administrative head at the California Institute of Technology, or Caltech. There, she led a team of research administrators and served on institutional boards to improve administrative efficiency and compliance with federal research guidelines. Gabriella holds an MBA from Franciscan University of Steubenville and a BA in Social Sciences from Colorado State University, Pueblo. I even had a pronunciation key.

Last but not least, Kendra Hillman is a project coordinator for Arizona State University within the Research Development Office. She manages a functional group of opportunity management, which includes limited submissions, research-related nominations, and internal grants. Thanks, Kendra, for joining us.

I'm so glad to have these panelists here, but you came to listen to them, so we'll get started with the panel discussion. We'll get to some basic questions with each panelist first so that we have a good baseline understanding of what research and limited submissions are done on each campus and their general approach.

At the top left on my screen is Gabriella. We'll start with you. Gabriella, tell us a little bit more about your role in limited submissions, how long you've been doing it there, and how many limited submissions you manage and what types? Because I know in some institutions, for example, that have a medical school, especially a large medical school, maybe they handle them on their own. But give us a little bit of background.

Panelists' Roles

Gabriella: Sure. I've been at Texas A&M for about a couple of years now managing limited submissions. I think because of the nature of Texas A&M, it's a large institution, we handle everything centrally, and I think that's just to keep everything clear. In our last fiscal year, we managed over 350 limited submissions opportunities. About 15% of those were from foundations, with most of the remainder being federal opportunities. That's how we organize within A&M.

Carlos: Thanks so much. Next. Kendra, you're next on my screen, so we'll go with you.

Kendra: Great. Thank you. I've been at ASU, like Carla said, about two years managing limited submissions, and that includes any research-related nominations and any internal grants, but my main focus is limited submissions. I manage and run probably right around 200 opportunities a year. Most of those are from federal sponsors, but we also work with philanthropic and corporate, but our main chunk of that is federal.

Carlos: Great. Thanks so much. Jalon, question to you. Tell us a little bit more about limited submissions at Rice University.

Jalon: Thank you. I've been at Rice about a We are now managing limited submissions. I will say within the past six months or so, early on, I managed just federal and state. Within the past six months, I've moved more towards assisting in corporate and foundation research opportunities as well. What I do is connect our OCFR office and our ORD offices. Unfortunately, I don't have a number like Gabriella and Kendra did about the number of limited submissions we do. But even though Rice is a smaller university, definitely a lot smaller than A&M and probably smaller than ASU as well, we still push out a lot of opportunities to our faculty and staff. I think that's it.

Carlos: Thanks. They're time intensive, too. No matter the number, they are time-intensive. And, Alyssa, tell us a little bit more about the limited submission landscape at Colorado School of Mines.

Alyssa: Yes. Thanks, Carlos. At Colorado School of Mines, I've been doing limited submission work for almost three years now, so long as I've been at Mines. And it's maybe about 10-15% of my overall job. Mines is a smaller institution, and it's a STEM-focused institution, and we don't have a medical school. Our scale of limited submissions is much smaller, and we're not going after a whole slew of NIH stuff. We have a little tiny crew of faculty who would actually be applying for NIH. That is up to an average of about 30 limited submission competitions a year. So much smaller than the numbers that the others have said. About 30 federal, I should say, and about 8 to 10 foundation opportunities per year, although those opportunities are managed by our corporate and foundation relations team. So, I don't have to do all the work around those. We also use InfoReady for... our seed grant program for getting people set up to submit competitive external proposals. So, we run those through InfoReady and then internal opportunities that come up here and there. For example, we had some endowment funds become available, so we held an internal competition for to use as supplemental funds on existing grant work.

And then just this last year, we use InfoReady for our internal process to select projects for Congressional appropriations. We had a loose process around selecting projects in the past, and we decided this year to formalize it using InfoReady. So, these are the projects that we're talking to our congress people about, what used to be called earmarks. It worked well for us as well. There are other opportunities, I think. We'd like to talk to the graduate school office. I think they would appreciate this system, but we haven't gotten there yet.

Growth and Challenges in Limited Submissions

Carlos: Thanks so much, Alyssa. Now that we have a baseline understanding of the landscape of the submissions at each institution. Let's dig in a little more. But first, I have a follow-up question for Alyssa. You mentioned a bunch of different types of processes. Are you involved in all those?

Alyssa: I am involved in the lead grants, and I was involved in the Congressional Appropriations. The foundation piece, I was happy to have a colleague take over the being the point of contact for those.

Carlos: Sometimes you're just switching gears, different types of processes, different stakeholders involved internally. It sounds like you are busy with a wide portfolio there.

Alyssa: And I just graphed yesterday the limited submission activity that we've done. And it has been increasing steadily every year since I started in 2022. And fiscal year '25, which we're just a little over halfway through, we are already at almost double the number of limited submissions. For whatever reason, this year has been extra busy with the number of limited submission opportunities that we are dealing with. I don't know if others have had that experience as well.

Carlos: Congratulations on more limited submission activity. Really? Yeah. No, that's a positive sign because I think that means your faculty, the researchers are interested in more opportunities, and you're finding them for them.

Alyssa: Yeah, I think part of it's my learning curve. I know more now about what opportunities are going to be relevant to faculty, and so putting them on InfoReady. Whereas maybe in the past, I wasn't aware of those opportunities, or we didn't think we'd have enough interest to warrant an internal competition, and now we're seeing more interest. So, a combination of those factors.

Carlos: And so I'll take this to the other panelists here. Yeah, Gabriella. Haven't heard from you in a while. What growth have you seen on campus for limited submissions?

Gabriella: We've seen growth both in the number of limited submissions opportunities that we've been posting and also in activity within our institution. We have more and more faculty who are interested, who are applying. That's been nice to see that we are finding opportunities that they're interested in, that align well with their research.

Carlos: Is there any particular area that's growing more research focus area, growing more at Texas A&M than others?

Gabriella: For our campus, more popular is an NSF, Department of Energy, and we are trying to grow more towards additional medical research with NIH sponsors, those type of funding opportunities. But so far, a lot of the activity we see is across NSF and Department of Energy. I'm just talking about limited submissions.

Carlos: It makes sense. A lot of energy in Texas, so makes sense that that's an area of research that's emphasized. Well, Jalon, how about at Rice? What growth in limited submissions have you seen?

Jalon: There actually has been a decent amount of growth, like Gabriella was saying, not only in what we post as a university, but also how active our faculty is going after it. I know our VPR implemented an incentive program where he would extend funding dollars for people who just even went after certain opportunities. If they were awarded, they would get their award, but they would also receive something from the university as well. I think that was a good incentive of ramping it up, especially for our mid-level faculty who are... I feel like the early career faculty are very ambitious, going for a lot of opportunities, and then once they get to the mid-career might slow down a little bit, but that was a way of picking that up. We have seen a good increase amongst all opportunities, federal, state, corporate, and especially foundations.

Carlos: Well, here's a follow-up to that. As you're seeing the growth in limited submissions on campus, that means that you're posting more and potentially more competition. How has has InfoReady been helping you scale that up?

Jalon: I think it has made the process a lot easier, especially being able to streamline it. Even within our university, the office is collaborating together for different opportunities. Now, InfoReady has been able to give us the opportunity to make one system, a straight pathway to get these opportunities in, get them through quicker, have our competitions, and push them out. It's been very helpful bringing everybody together.

Carlos: That's good. We're going to drill into those a little later as well. But I don't want to forget Kendra over here. Kendra, I know Arizona State is an innovative campus, lots of people there. What's the growth of limited submissions been like there?

Kendra: As far as growth, I've been in this position about two years, and I would say it's steady growth, but we've had a really good base anyway of people that are aware and interested in limited submissions, as well as the things that we are posting and putting out. So I think there's always a little bit of growth, but luckily, we are pretty established in that. Our faculty and research administrators are relatively in touch with InfoReady as well as those opportunities. So we have that good base there. But we are seeing a lot of growth in Arizona with some... Trying to think of the word, sorry. Semiconductor, we're getting a lot of opportunities related to that here in Arizona. So I've seen a lot of growth in that area. Definitely some STEM-related engineering type of opportunities that we're growing a little more. Then also, we are growing our nominations, and I know that's a little different from limited submissions. Some of them are limited, but we are trying to grow that within InfoReady and using ready to collect those applications as well.

Carlos: We're going to move on to a related topic here. I think all of you are using Pivot to find funding opportunities. How do you interact with Pivot-RP? Do you direct faculty members to search on Pivot and let you know? Tell me a little bit more about Pivot's presence on campus, and this one's to Kendra first, for finding opportunities.

Finding and Promoting Funding Opportunities with InfoReady and Pivot-RP

Kendra: I check Pivot regularly. I used to check it every Monday. That was my thing. I've started checking it maybe every other week right now because we have a pretty good list of existing opportunities, as well as directing our faculty and research administration staff to use it themselves. Because there was a time, especially when I first started and was getting the hang of it, I was posting a lot of opportunities from Pivot and not getting any applications for them. So we've definitely narrowed our search down to be a little more precise and what our faculty are interested in. And I do have my limited submissions set up on Pivot, so it's a little more streamlined to be ASU-related topics. But I do still use Pivot. I believe it's during the summer, we have basically training sessions that we host for faculty, and one of those is always a Pivot training. We encourage our faculty to use that as well as our research administration staff, so they're able to use that, let us know if there's anything that's not posted already.

Carlos: Got it. Then with the integration between Pivot and InfoReady, when you are told, Hey, this is something I'm interested it in. You're doing the automatic push into InfoReady.

Kendra: We're able to push it, which is wonderful. My favorite feature.

Carlos: It's a time saver. Do you have a template in InfoReady that you push the Pivot opportunities into?

Kendra: I do. We created an updated template when the free form was updated, and that's what we use, and we've tailored that to meet our requirements.

Carlos: Thanks. Just clarifying note for people listening in, free form, also known as Form Designer. So when you're on the template selection and you click the drop down and choose Form Designer. We originally were going with the free form name, and then about a month before we started our beta testing with beta users, Apple released a new product called Free Form, so we dropped that.

Kendra: Yes. I'm sorry. I did know that. In my mind, it's still free form, but I did know that it's called Form Designer.

Carlos: Well, that's what we were promoting at first. But Apple is just a little bit bigger than InfoReady, just a tad. So I'm going to be asking all of you a little bit more about how you find funding opportunities on campus and promote them. So Alyssa, what are you doing at Mines to find funding opportunities and promote them to faculty members?

Alyssa: We also use Pivot, and I really rely on the related lists that are pushed to my inbox. I don't actively go into Pivot as often as I let them send me the things that they think I'm interested in based on the parameters I've set. So that is one way we know about funding opportunities. Like Kendra mentioned, there are those opportunities that we just know are cyclical on an annual basis, and our faculty are interested in them. So we keep our eyes on them, and we push them out in our newsletter every year when they come up. We are also signed up and the other folks on my RD team are all signed up for all the different agency communications and listservs. DOE and NSF are our biggest two funders. We are signed up for all the different newsletters from all the different directorates and offices, and we cull through those. We actually meet as a team weekly, so it's not a single person that has to manage all of this. We meet as a team weekly and look at all the different funding opportunities we've all seen come through, and we decide what to publish in our newsletter that goes out to all of research active faculty.

We can't include everything because then people stop reading it and it's too long. So we try to focus on the things that are either going to generate the most interest amongst the broadest group of people or things that are particularly large or things that were related in the early days to the infrastructure legislation, like the Bills and IHRA laws. So we encourage faculty to really use all those sources as well. There's not one source. If you're just relying on our newsletter, you're not going to see everything related to your work. We really do want more of our faculty to use Pivot themselves so they can tailor their own searches and really get the most relevant stuff for their specific research. It is definitely a multi-pronged approach to really see everything.

Carlos: I agree with that. People are busy, so you have to have multiple channels in which you're communicating out the information you want. If you just rely on one, they're likely to miss that, especially if you only send one email, one message about it.

Alyssa: I also really like the push to InfoReady feature from Pivot. That's very helpful.

Carlos: A big-time saver, for sure. Jalon, what are you doing at Rice to promote funding opportunities and help faculty members find them?

Jalon: I'm a little bit different. I'm pretty much in Pivot almost every day or at least every other day during the week. A big part of that is, I think it has to do with the institutional push for the uptick in research, just making sure that we're getting more opportunities out, more things to our faculty. A big part of my job is also doing research for faculty members. A lot of times people will come to me, and it helps give me a better idea of the research landscape at Rice, which is pretty expansive, if I had to say so myself. There are a lot of things that I think that I probably would miss had I not met with certain faculty members to understand what they're working on. So Pivot is something that I'm using a lot, but I also use Grants.gov, and the different funder websites, NSF, NIH. I am looking at those things as well. Like everybody mentioned already, definitely using the push to InfoReady right out of Pivot. That's a time saver. I feel like it can't be overstated enough.

Carlos: Big time saver. This is going to dovetail into two-part questions for Gabriella here. First, I'm going to ask you the same question I was just asking everyone else, but also with 200-300 limited submission opportunities that you're finding that you're promoting. How are you finding and promoting those? How many of those are leading into internal competitions in InfoReady?

Gabriella: I use Pivot. I have a saved search with our particular parameters, and I have just an automatic email. So I'm looking at Pivot and what it's finding for me weekly. Also, subscribe to all the listservs from sponsors, NIH, NSF, NASA. Then in addition to that, I have fantastic colleagues on my team who don't manage limited submissions, but in their own role, when they're looking at opportunities, if they find something as a limited submit, they will send it my way. I have great people on my team and also across campus, other RDs who will find something limited submit and we'll send it our way. That's really nice that we all work together. Also, sometimes faculty as well, they find limited submissions and they'll send it our way to. It might be something that they're interested in or that they know just will be of interest on campus in general. We're promoting those in a variety of ways. We have a weekly newsletter that we send out. In addition, we have a website, and so we post everything weekly on there and then on InfoReady. We direct our faculty consistently to InfoReady to let them know that these are all of our open competitions that are running right now.

Because I think A&M is a little bit different that it is so large, we do cast the net pretty wide because we have such a diversity of research on campus. Of those over 350 opportunities, at least half have strong interest, and we're running internal competitions.

Carlos: A lot of opportunities that go to competition.

Gabriella: Yeah, I would I think about half, but that ends up being quite a bit when we're casting the net so wide and we are posting so many.

Carlos: Yeah, absolutely. With so many going to competition, you probably have to line up a lot of reviewers. Tell us a little bit more about recruiting reviewers for all of that.

Gabriella: the way we are organized is ultimately, reviews are the responsibility of our research deans, but we offer a lot of flexibility within that model. Our research deans will have a committee. We would like to have at least three committee members for those reviews. Typically, for most competitions, those research deans will be representative of who has applied. So whatever college they're applying from, it'll be that research dean. If needed, we can also add subject matter experts. Within InfoReady, we have a database where people who are interested in volunteering to serve on a review committee can do that, and they share within InfoReady what their subject matter they're an expert in. And so that's very helpful. I can go to that database and pull reviewers from that. Then for our research teams, we have various models. They can be the sole reviewer. We can help them set up a committee so that they can have a proxy who can go in for them and submit the rankings and the feedback there. We try to offer a lot of different models for them because it can be a lot because we do have so many limited submissions competitions, particularly for those colleges that are very active, for one person to be reviewing all those applications can be a bit much.

Some of our research deans do appreciate having a committee. Sometimes it'll be formal with one person serving as a formal proxy for a defined period of time, like one year. Other times, it'll be more of an informal committee based on that competition that the research team will go ahead and convene that committee in-house.

Carlos: Thanks so much for that. It's The review process is so important. With so many reviewers needed, you definitely need a variety of approaches to meet your needs there. Kendra, how are you recruiting reviewers, assigning them in InfoReady? What's the review process look like at Arizona State?

Managing the Review Process

Kendra: Although we start with around 200 opportunities that we post per year, we only have about 10 to 20 at the most to actually go to an internal competition review, which is definitely not half. Last year or fiscal year 2024, we had a lot, about 20 that did go to a review panel, but it's between 10 and 20. As far as reviewers, how we have it set up, and we are working on updating it a little bit, so maybe next year it'll change a little bit. But for right now, we have an ad hoc group of faculty, all interdisciplinary from different colleges and different subject matters. They are volunteer also maybe some voluntold by RAs and RDs to help with that process. We try to have a pretty hefty list from our engineering college because a lot of our reviews are STEM based in that field somewhat. We try to have an existing list that I pull from for our reviews. A lot of times I send out those emails in bulk, and I do want some subject matter, focus with these people, but we do interdisciplinary as well.

How are our review panels set up? We also have a limited submission chairperson, which is an appointed faculty member. That helps also review those applications, keeps our reviewers in conversation. When we all meet together, he guides that conversation and has his input there, just because I'm not qualified to read a lot of these applications. They're able to help facilitate that. And we do try to have at least three reviewers on our panel at a time. We ask them strengths, weaknesses, how well it fits the sponsor, and then a score 1-100. The applicant doesn't see that, but it helps us keep it in rank. That's how it is set up. I don't know if you had a... I hope that answered everything. If you have a follow-up, let me know.

Carlos: I do have a follow-up. How many routing steps are you using in the competition? Because it sounds like there's three reviewers assigned per application in one part of it, but it sounds like it's multiple steps in the review process, potentially.

Kendra: Well, let me think. It's been so long since I've really messed with my routing steps since I have them set up. So we assign our reviewers. They're sent an email with instructions and the rubric essentially, especially for reviewers, and then they put in strengths, weaknesses, fit with sponsor, any additional comments, and a score. Then I take that information and input it into my own Excel sheet that we then do the rankings, and that's what we review during our panel meeting. What is that? Maybe four steps?

Carlos: Okay. The initial subject matter review is being done in InfoReady, where you're collecting the information.

Kendra: Then you're- That's where our information is collected, and then I input it into a different Excel sheet to go over with our reviewers altogether.

Carlos: Good to know. These are the nuts and bolts that everyone has to think through when they're managing the competitions that are occurring. I think every campus is a little different depending on multiple factors.

Alyssa, I haven't spoken to you in a while. How's that review process done at Mines? How are you recruiting reviewers? Do you have a panel? All the questions.

Alyssa: There's not a one-size-fits-all approach for how to do any of this from institution to institution. At Colorado School of Mines, with maybe as many as 10 competitions requiring review panels every year, so again, a smaller number, we don't have a standing committee of people we pull from, mostly because it does seem like each one requires different subject matter experts. We sometimes won't know what subject matter expertise will be most important until we see what gets submitted. So not only the focus of that particular competition, but who actually ends up submitting. We're small so sometimes finding reviewers that don't have a conflict of interest is a challenge as well. If it's a nuclear engineering opportunity, all of our nuclear engineers have probably applied, so we don't have another one who can serve as a neutral reviewer. I think there are definitely areas to improve. I have a list that I keep in the back of my mind as people who have been good reviewers in the past and might have a broader base of knowledge, more of a generalist who I can call on.

But I would love to explore the idea of standing committee members and incentivizing that service by making it count toward their required services, faculty members. When you're asking folks to just volunteer their time, that is always a challenge. Especially, I have found the faculty members who step up as really good reviewers. They're really thoughtful and engaged. They're often very overcommitted people because they get involved and engage in a lot of things. We've been managing with the number of actual committees, review committees, we need to pull together on an annual basis, but there are a lot of different strategies for how to do it depending on the institution and the size. That's just where we are right now.

Carlos: Thanks. I have a follow-up as well. Due to a higher probability for conflicts of interest in some research areas, Mines, do you ever look for external reviewers, external subject matter experts?

Alyssa: I will say we are open to that possibility if it ever really feels like the best solution. We haven't. In the time I've been here, we haven't gone to an external reviewer. Well, I will say we've engaged... We have some consultants who work with us on federal relations type things. They might know the Department of Energy really well. So they are adjacent to us. They're not staff, but we're paying them for their support. There have been a few instances where we've asked those types of people to serve on our review committees.

Carlos: Thanks for that additional information. This is a quick tip for everyone on the call. InfoReady does accommodate external reviewers. If you have someone outside your institution who you want to assign a review to, you can do that in InfoReady. Just put in your email address and the account is automatically created for them. They're pings with information about an account being created for them and with the review assignment. So it ever gets to that point for you.

Jalon, we've been talking about managing reviewers, recruiting reviewers, how the review process is done in InfoReady. What's the situation at Rice with managing reviews in InfoReady?

Jalon: Rice It sounds like we're a little bit different. We actually do utilize a standing committee of about 10 to 12 members from various disciplines across campus. For their time, I think they are compensated with some type of resource or incentive, but something to just help them because obviously they are very busy. I think the idea behind using the standing committee is obviously for some type of consistency, but also having the non-expert members reviewing as well to give If we're looking at a harder science, a competition for something in the hard sciences, having someone who's from the humanities also look at it and be able to provide their feedback back their insight just to produce well-rounded proposals overall. We do utilize a standing committee. I was not familiar with InfoReady. What you were just saying, offering external reviewers. That is something good to keep in mind, and maybe that could be something that we introduce on our campus. But for the most part, we have our standing committee, and sometimes we'll utilize ad hoc. That part of the process we're still working on. But for the most part, everything goes on to our committee.

Carlos: Great. Thanks for that rundown. A little different than what other people were saying. That's why it's nice having a few different panelists to get a few different views. Another note, everybody has a routing step called Committee Ranking that facilitates the more traditional committee meeting where you have a point person that would be the one that enters in the committee's census decision on each application. We can do committee ranking, committee approval, all that stuff in there. Really a nice feature.

Q&A with the Audience

We're going to move on to Q&A. We've got some questions that came in. Let's answer these audience questions. First, if you have a list of the limited submission opportunities you post yearly, how do you manage the list and decide when to post? Do you wait for the new solicitation if it is not yet renewed? Gabriella, we'll go to you first.

Gabriella: We do have a list of recurring opportunities that we're going to be posting. We actually keep that in a list on Monday. That's how we manage it because it does have a push with reminders. We use that. We have a limited submission policy that determines what we are doing most of the time. For recurring opportunities, we like to post as soon as possible. That's going to be anywhere between 6-8 months before the sponsor's due date. For some of those that are recurring, like an NSF or an NIH, where those due dates are known, that's an easy one to post. For others, for foundations that have those recurring opportunities and they're very steady and consistent in those postings. They might not... Oftentimes, foundations don't actually update their websites with the opportunity, but because they've been so consistent, we will post ahead of time. Occasionally, we'll actually just go ahead and check in with the program officer in those foundations and just double-check. If they post anything on their website saying that they're in the program, we would probably hold off in that case. But otherwise, for those foundations that have been really consistent system, we'll go ahead and just post ahead of time.

Carlos: If there's any changes, it's a quick edit in info ready to make those changes.

Gabriella: Exactly. Oftentimes, I'll make a notation as well in anticipation of the release of the FLA, so that everyone's aware that the FLA hasn't been released yet.

Carlos: Great. Kendra, how do you manage that calendar? The yearly calendar? You know that there's opportunities that are run each year. How do you decide when to post?

Kendra: Currently, I have an Airtable list that I have started putting all these reoccurring offering opportunities from our past records and history. I've been inputting them in there. How I have it organized is the typical external sponsor deadline. Then I'll have our internal deadline, typically when we would do that, which is about 12 to 8 weeks prior to the sponsor deadline. So I'll have those in two columns, and then I'm able to look at that and be like, okay, I need to post that this month. I need to post these ones this month. So I have it organized by month of when I need to post. We do like to put those out at least probably four to five months before a sponsor’s deadline, so similar to Gabriella. But I do use Airtable right now to organize that any opportunities that don't have the solicitation available at that time. If it's something that's been consistent, I will still post it and put it at the beginning of my description, with a note that this is anticipated, we will update this as the sponsor releases that information, and that's worked pretty well for us.

Carlos: Then you're collecting letters of intent there while you're waiting for an update, confirmation? Yeah. Great. Alyssa, did I forget about you?

Alyssa: If Airtable and Monday sound like great ideas, and I'm going to check those out. I use good old Excel to keep a list of the recurring opportunities. I generally try to time it so I'm posting things about 12 weeks prior to the deadline. If I'm doing a two-phase process, which we do most of the time, we start with the expression of interest or the LOI, we would have that due 10 weeks prior to the deadline. Then we aim to have a decision made. If we're moving to a full competition that puts us at about eight weeks out that the full competition is due internally, and then a decision as soon as possible after that. So it leaves roughly six weeks for the applicants to pull together their full application for the external sponsor. That's the ideal if we know that the deadline is set and the RFP is out or the notice is out. I haven't been posting things that are anticipated, but it's something I'm thinking about just to avoid some of those shorter time frame scrambles. If you have that caveat that this is anticipated but not yet released, then that's helpful indicator to the faculty that things could change.

I'm just thinking about with different sponsors, NSF is really good with more predictable recurring annual deadlines. I feel really confident about having those on my spreadsheet and knowing when they're going to come up, and I can plan the workflow around those pretty well. But that's not always the case with every agency. DOE has some things that are really predictable but a lot that are not, and they're not annual either. It's a mix, again, as I sometimes feel like I'm fumbling my way through it. But when the sponsor offers that consistency, I love it because it's just so much you can manage all of your own work so much easier.

Carlos: Being able to rely on that consistency. It definitely helps with better planning. Jalon?

Jalon: I think that was a great point by Alyssa, especially with DOE versus NSF. It is nice to have NSF that does have that consistency. I know sometimes with DOE, I think I've seen opportunities, limited subs come through and maybe be doing three or four weeks, which obviously is very far from ideal. But we tried to finish competition It's up at least... We want to try to give PIs about three months before the funder deadline. Granted, that may change depending on what the funder's requirements are. If they have If they're looking for a full proposal, we try to give at least three months. Granted, we can always do that given the circumstances. But it varies a little bit between our federal and state versus corporate and foundation. I know corporate and foundation, I think, tend to be even better being on a schedule coming through at a pretty recognizable time during the year.

Carlos: We got about five minutes left in the webinar. We have some rapid fire questions to you. So InfoReady has the limited submission Sorry, the letter of intent functionality in the system that facilitates two-phase opportunities where you can convert to competition if need be. Jalon, do you use that feature?

Jalon: Yes, we do use it.

Carlos: Alyssa, do you use that feature?

Alyssa: Absolutely. All the time.

Carlos: Kendra?

Kendra: Not really.

Carlos: I think Gabriella and Kendra's institutions are posting the highest number of limited submission opportunities on this call. Just really quickly, why do you typically not use the letter of intent feature? Gabriella?

Gabriella: A lot of it has to do with timing. Again, I think it's a function of how large the institution is. And so to have a two-tiered system often doesn't really make sense, particularly aligned with our policy. It makes the most sense to just put that competition out there. And if someone's interested, then we'll know. We just have times when we'll get a very limited number of applications, and we can auto-award from there without going to the full competition with a panel. Got it.

Carlos: Kendra, is it a similar situation?

Kendra: Yeah, pretty similar. And I would say if a letter of intent or anything ahead of time is required or is not required by a sponsor, that is not the deadline that we go off of. We go off of the full proposal deadline.

Carlos: Got it. Okay. No, that's good to know. It seems like the volume plus the timeline really impacts the decision on that. Okay, so we're at time here. We've got two minutes left. I want to thank our panelists. Great conversation today. Really informative. I think some of these best practices, methods of managing limited submissions in InfoReady and everything around it, promoting it, getting reviewers, is really helpful. I want to thank everyone who joined us today.

