5 Project Design

Introduction

If you are reading this book, you are probably a graduate student or faculty member at a college or university, which means you already write quite a bit. You may not be Shakespeare, but you can string a sentence together—and you probably get annoyed when people leave the article out or do not correct typos. So, like most academics, you can write.

The good news about the writing aspect of grant proposals is that it does not require sparkling prose (although that is always helpful). Successful grant proposals require clear communication. The singular importance of clarity in grant writing cannot be overemphasized. If the reviewers cannot figure out what you are proposing, they are not likely to fund your project.

Clarity is produced on several different levels:

The project must make sense.

The sections of the proposal must be organized and interrelated effectively.

Paragraphs must flow easily from one to another.

The sentences of a paragraph must be arranged in the correct order and must complement each other.

Sentences must be direct and understandable.

Grammar must be correct.

Words must be used appropriately.

Spelling must be correct.

There should be no typos.

Although this list may sound obvious, it is not always easy to pull off. For one thing, the more familiar the text is, the more likely you are to overlook small but important items, like transitions or articles. In many cases, the author is so familiar with the project that she fills in the details unconsciously as she reads. This can result in gaps in the argument or insufficient detail for the reader to grasp the project. Putting together a concise, well-written grant proposal narrative is no mean feat.

This chapter will help you with the first three items. We will discuss conceptualizing your project and making decisions that support your vision, by working on project design, research questions, goals, objectives, and activities. Then, we will put the resulting structure on paper through a logic model, which is a table, diagram, or flow chart designed to help break out activities and their interrelationships within a project. In the case study right after this chapter, we will apply a project to a logic model so you will have a practical example to consider.

Project Design

Project design is a multi-dimensional process because any project is made up of several interlocking parts that may appear simple but in reality can be quite complex, as answering these few simple questions will demonstrate.

Who?

Who will work on your project? Are you working alone or do you have collaborators? Will other people need to be hired? What will each person do?

What?

What is the purpose of the project? What will it accomplish? What resources will you need to run the project? How will the world be different as a result of this project?

How?

How will this project accomplish its purpose? What is the work process you will use to accomplish project goals?

Where?

Where will your project take place? Do you need space on campus? Do you need a specific space in a specific building, or do you need to acquire space off campus? Whose approval will you need to use the space?

When?

What is your proposed start date? Did you choose that start date in consideration of the academic cycle? Do you need some ramp-up time? Have you considered the likely award date? How much time do you need to accomplish each part of the project?

These questions lead you into project design. As you answer them, consider the things that are required to happen as part of the project versus the things that can change or are negotiable. Try to notice which items affect other items. For example, where is always an important question and has ramifications for the rest of the project. Having access to a fully outfitted lab creates one type of condition for the grant, and having to furnish a lab creates another.

After you have answered these questions, you must find a way to convert the project design into a proposal. A logic model (which we will discuss later in the chapter) will help you put your design in order and convert it to a budget and into text.

Research Questions

For a research grant, the research questions define the project design, of course, because the point of the project is to answer these questions. For this reason, it behooves the PI to create thoughtful, specific, data-driven questions. Good research questions are not written on the fly; they benefit from thoughtful consideration and discussion with colleagues. Take your time and make these questions shine.

The purpose of a research question is to carefully define the study by combining the topic and methodology into a question structure that will be answered effectively by the data. Research questions should be responsive to the literature of the discipline(s) involved. As mentioned in Chapter 1, the best research study is often the next logical step in a particular line of inquiry. The ideal research questions refer to areas that have not been explored, have been incompletely studied, or have a demographic or environmental context that has not been examined. Funded projects do not simply fill gaps in the literature; and yet they are not too far beyond where other scholars are working. Funded projects pose meaningful questions that will drive knowledge forward in ways that many people value.

Of course, there are entire books written on the development of proper research questions (see Box 5.3); however, there are four basic problems that are very common to research questions in grant submissions:

Open-ended questions

Data mismatches

Too many questions

Incomplete expression

Open-Ended Questions

Open-ended questions can be problematic in a grant proposal because most funders want to know specifics about the investigation in advance. The question should define the form of the answer; the question should inform the reader about what the answer will be. In fact, the question should provide information about what data will answer it properly. For example, you can ask the following open-ended question:

1. Why aren’t students interested in pursuing STEM majors?

Or you can ask the question more specifically:

2. Is there a specific age when student interest in STEM subjects drops off? If so, what is the age?

There are many problems with Question 1. For example, how would one know when an answer had been found? It is so open-ended that you could pursue many different approaches to answering it. On the other hand, Question 2 provides a partial answer to Question 1: It asks whether students are interested at younger ages and at what point their interest drops off. The data to be pursued is suggested in the question. You could also ask this question:

3. What factors do non-STEM major students cite when asked why they do not study a STEM subject?

Question 3 provides a sense of how the question will be answered.

Because closed-ended questions most often lead to measurable research outcomes, external funders have a reputation for preferring quantitative studies. Of course, qualitative research can be just as empirical as quantitative work. Whether your research is quantitative or qualitative, the key to obtaining funding is to ask a question that can be answered with data—whether that consists of the demographics of Spanish-speaking immigrants, assessing networks of dental hygienists, or coding classroom dialog between math teachers and their students.

Box 5.1 True Story

As a research administrator, I have seen numerous situations where investing time and effort at the front end of grant development would have saved time, effort, and stress during the submission process. Without careful planning, a team can overlook extremely important aspects of the project, resulting in major budget reformulations and inconvenient rewrites at the last minute. For example, there was a Department of Education proposal where the PIs forgot to factor in pay for teacher-participants’ afterschool effort. We discovered this three days before submission.

Thirty teachers would be working an extra 80 hours each per year, and their pay averaged about $38 per hour: $38 × 80 hours × 30 teachers = $91,200 per year.

Of course when working with salary, fringe benefits are also required, and this added about $29,700 for a total of $121,296 to the budget over the maximum request—so cuts had to be made to other lines of the project.

The process of cutting more than $100,000 from the budget caused important revisions to the project plan—the PIs simply could not afford to do some of the things they had originally planned to do. As a result of these cuts, the narrative had to be rewritten to reflect the changed project. Of course, three days from submission, one should be submitting the proposal. Any rewrites at this point should be last-minute sculpting of the text to make it shine rather than a complete revision.

If we had employed better planning and even a logic model at the front end, this crisis could have been averted.

Data Mismatches

Trying to answer a question with data can reveal when a research question is not worded well. For example, if I ask the following question, I may run into some problems figuring out what data to use to answer it:

Do graduate students find grant writing class boring?

How does one define “boring”? Merriam Webster says that it is “the state of being weary and restless through lack of interest.” How does one quantify this definition? How can weariness or restlessness be measured? Perhaps I could do the following:

Observe students during class and record how often they engage in off-task behaviors during a lecture

Code the interactions between students and teachers to track for students’ expressed lack of interest

Have a research assistant sit in the back of the classroom and count the number of laptops displaying screens unrelated to the class topic

Create a survey that measures students’ opinions on their engagement with the grant writing curriculum

Choosing a data-gathering method allows us to specify the question and perhaps conceptualize it differently.

Do students express lack of engagement behaviorally in grant writing class?

How do students think about their engagement with the grant writing curriculum?

Box 5.2 Good Advice

If you only remember one thing from this book, remember to always, always follow directions!

Too Many Questions

It is very common to find a plethora of questions in the proposals of new PIs. They may ask as many as five or six different research questions—perhaps because they want to get a lot done with the grant money, or perhaps because they do not know which question will work best and they want to be sure to produce significant results. The problem with too many questions can be either (a) they are repetitive and should be collapsed efficiently into one question, or (b) they represent several different projects and therefore should be proposed separately.

The research question should represent the main thrust of the research, but it does not have to reflect every single nuance: That is what the proposal is for. It often happens that during the process of a research study, interesting information not directly related to the research question is produced. This may be reflected in the proposal rather than the research questions, or it may not be discussed at all.

For example, below is a list of research questions to revise:1

Does the use of acupuncture help speed recovery for drug addicts?

Do regular acupuncture treatments help addicts resist relapse?

Do recovering drug addicts from underserved populations report benefits from weekly acupuncture treatment?

Does daily yoga practice provide psychological benefits for drug addicts in the initial recovery period?

Does daily yoga practice provide benefits to drug addicts in residential recovery facilities?

Does daily yoga practice shorten the recovery period?

How many projects can you find in these questions?

I find at least two different projects:

Acupuncture to treat recovering drug addicts

Does the use of acupuncture help drug addicts speed recovery?

Do regular acupuncture treatments help addicts resist relapse?

Do recovering drug addicts from underserved populations report benefits from weekly acupuncture treatment?

Yoga to treat recovering drug addicts

Does daily yoga practice provide psychological benefits for drug addicts in the initial recovery period?

Does daily yoga practice provide benefits to drug addicts in residential recovery facilities?

Does daily yoga practice shorten the recovery period?

If we read the questions carefully, there are really three different projects in each category. In this case one could opt for multiple projects rather than trying to fit so much work into one project. To answer one really good question is a worthy goal for any proposal.

Box 5.3 Resources on Research Questions

This book covers research questions only in a very general way and only from the perspective of grant writing. Readers who desire more assistance in developing effective research questions might look to the following resources or ask an advisor.

Carey, S. S. (2011). A beginner’s guide to scientific method. Boston: Wadsworth.

Creswell, John W. (2014). Research design: Qualitative, quantitative, and mixed methods approaches. Thousand Oaks, CA: Sage.

Frankfort-Nachmias, C., & Nachmias, D. (2007). Research methods in the social sciences study guide. New York: Worth Publishers.

Neuman, W. L. (2004). Basics of social research: Qualitative and quantitative approaches. Boston: Pearson Education.

Remler, D. K., & Van Ryzin, G. (2001). Research methods in practice. Thousand Oaks, CA: Sage.

Salkind, N. J. (2012). 100 questions (and answers) about research methods. Thousand Oaks, CA: Sage.

Turabian, K. L. (2007). A manual for writers of research papers, theses, and dissertations: Chicago style for students and researchers (7th ed.). Chicago: University of Chicago Press.

Incomplete Expression

Another issue for many research questions is that of incomplete expression, meaning that the question does not include all of the relevant facts. Consider the following examples:

Does university faculty intervention assist teachers in providing accurate science instruction to students?

This question sounds academic, but what does it mean? For example, what intervention is being studied? Which faculty will be involved?

Does university science faculty interventionmodeling assist teachers in providing accurate science instruction to students?

Then the questions become, what teachers, what students?

Does university science faculty modeling for elementary school teachers assist teachers in providing accurate science instruction to their students?

Then the question emerges, what does accurate science instruction mean? How would this be measured? One way might be to record teacher lectures and analyze them in terms of science content. A less expensive method would be to look at pre- and posttesting of students. Because the measurement of data needs to shape the research question, this would be included.

Does university science faculty modeling for elementary school teachers assist teachers in supporting enhanced academic performance by their students as measured by pre- and posttesting?

Goals, Objectives, Activities

Some federal funders (like the U.S. Department of Education) will require project goals or overarching, long-term, hoped-for accomplishments in addition to (or rather than) research questions. These goals need to be very carefully defined and related to objectives (the organizational structures that accomplish the goals) and activities (tasks that are carried out to accomplish the objectives). Each activity is related to an objective, which is related to a goal. Defining these is a good practice, because it helps the PI to consider the entirety of the project effort during the planning stage. In fact, defining goals, objectives, and activities is the basis for the logic model introduced a little later in this chapter.

Goals

Creating goals can be a little tricky, because the definition of goals and objectives are often confused by both funders and PIs alike. Merriam Webster defines goal as the “end towards which effort is directed,” synonymous with aim. So the goal is the long-term result of the project—which, with research, is generally the testing of a hypothesis. For a service project, a goal is often a benefit projected to result from the intervention. It might be to send more underserved high school students to college, to increase reading scores for K–6 students, or to lessen alcohol consumption on campus. Notice these are measurable goals: The number of high school students who go to college can be counted; students’ reading scores can be determined; and likewise, the number of DUIs, disorderly conduct situations, or students seeking counseling can be counted. Like research questions linked to the resulting data, measurable goals are preferred because they can be quantified.

Often the goals are created to define project success. For example, how would success be measured for a program designed to help first-generation college students excel at the university? If success for first-generation college students is defined as retention to a program or to the university, then the goals will involve retention and be stated something like this: “As a result of this project, participating first-generation college students will be more likely than nonparticipants to finish their degrees within six years,” or even, “First-generation participants will be 50 percent more likely than nonparticipants to enroll in university classes the semester following the intervention.” On the other hand, success for first-generation college students may be defined as integration to the university community as reflected by involvement in school activities. Such a goal might read something like this: “First-generation student participants will be more likely than nonparticipants to join university activities and clubs during their first year at the university.”

Image 2

Box 5.4 The Nuts & Bolts: Using Funder Language

It is important to keep in mind that different funders may require different terms to describe goal-creating activities; or they may define terms differently. For example, “goals” and “objectives” may appear interchangeable in an RFP. One funder might require the term “goal”; another funder might use a totally different term, like “aim.”

Be alert for the type of terminology the funder uses. Make sure you understand it and use it appropriately—meaning, in the way the funder uses it.

Objectives and Activities

Objectives are the organizational structures that make up the project, which are themselves composed of activities. These are all created to accomplish the goals. For example, if I was proposing a project to increase retention of first-generation college students, I might set a goal to increase their academic success by improving their pass rate. One way to accomplish this might be to provide tutoring services. That would be an objective or a real-world solution to help achieve the goal. Then, in order to accomplish this objective, I could define the activities necessary to create the tutoring services. The process could be thought of as diagrammed in Figure 5.1. Each goal can have multiple objectives, and each objective can have multiple activities. Conversely, every activity must fit into at least one objective, and every objective must fit into at least one goal.

Activities require resources and make up the budget. When relating activities to the budget, ask these kinds of questions:

How many tutors will we hire?

How much will we pay them?

How many hours will they work each week?

Can work-study funds be used to help defray this cost?

Is this a kind of logic model? Yes, absolutely.

Figure 5.1 Enhancing Academic Success

Figure 9

Each activity builds the objective, and the objective builds the goal.

Logic Models

One of the best tools for relating project structure to a grant proposal is the logic model, which is a kind of schematic or diagram of the project. Creating a logic model is an efficient way to conceptualize the project as well as all the resources that will be required for successful completion, from start to finish.

One strength of the logic model is its clear application to the budget. During logic model development, the resources required to run the project can be analyzed and listed out. This list, of course, will transfer directly to the budget for itemization and costing. By figuring out all the necessary resources during the development of the logic model, you ensure that all budget lines are related to project objectives and goals and, therefore, that all project objectives and goals will be sufficiently funded for implementation.

Analyzing the budget and project process through a logic model will assist in the creation of the proposal narrative in two ways:

The entire project description will be worked out without the demands of narrative creation, allowing the PI to consider how the project will work best in a straightforward way.

Working out the kinks of the project before the narrative process begins is more likely to prevent painful and unnecessary rewrites (and budget revisions) toward submission time.

Figure 5.2 How the Logic Model Relates to the Proposal

Figure 10

The logic model brings order to ideas and resources, helping to create a better project.

The logic model, rather than the narrative, becomes the central organizing document of the submission.

Many people design the project as they write it, making the narrative the organizing document in grant writing, yet this is not efficient for several reasons:

It is difficult to glance at a narrative and quickly see its elements, making the project more difficult to reorganize.

If the project organization is worked out through the narrative this means that the organizing information is buried in the text, and therefore challenging to find and update.

When the project is organized through the narrative, it is difficult to be sure that all project components are accounted for in the budget.

On the other hand, when items are listed out in a table or graphically arranged, it is much easier to conceptualize the relationship of ideas and to create alternative logical arrangements of them.

Theoretically, a logic model can include whatever categories you need to clarify your thinking about your project. When you are trying to design a project, especially for a university grant, you are using the logic model to apply your thinking to project creation in an institutional context. In that case, I recommend that your model include research questions/goals, interventions/objectives, activities, and resources.

Using a Logic Model

Perhaps a van is needed to conduct a project. If the project is being designed by writing the narrative, the PI might end up with a sentence like this:

Participants will be taken to the afterschool program in a van so that they can begin training as environmental science interns. The onsite internship program will consist of four different labs located in the main school building.

The writer mentions the van in passing and moves on to the afterschool program, the focus of the project. The problem is that if the van is only mentioned in this one sentence, buried on Page 7 of a 15-page narrative, it may be overlooked and never find its way into the budget. That would be an important omission.

If, instead, the PI was working with a logic model, she could write the following:

 Table 1

Having a column to the right for resources is pretty handy, because it prompts the writer to think, what do I need to transport the participants? The answer to that question is what goes in the resources field. In this case, what is needed is a van. Then, because this is planning, the PI might think, what other resources do I need to have a van for the project? Do I need a driver, insurance, or a garage? Should I ask for sales tax in addition to the van price? The table allows the PI to think about the van in some important detail.

Table 2

For those who would like to include a more complex and theoretical logic model in the narrative, there are many interesting books available to consider; however, for simple project planning I recommend the (free) logic model system produced by the W. K. Kellogg Foundation. It is available on their website (www.wkkf.org); search using the key words “logic model.”

For more information on how to create and use a logic model, see Case Study 1: Application of a Logic Model.

Working With Your Sponsored Projects Office

Your sponsored projects personnel will probably appreciate efforts to use a logic model to design your project. They regularly see projects submitted that are not well thought out and, therefore, do not get funded.

The average sponsored projects officer knows a great deal about how his institution works and may also know something about project planning. If the office is designed to provide project assistance, take advantage of the knowledge the staff may offer. Among other things, your sponsored projects staff may be able to discuss the following:

Projects that have been successfully funded from your institution. What has worked for other PIs may also work for you.

Problems that other PIs at your institution have faced and how you might design your project to deal with or avoid these.

What sorts of specific complications may be caused by your project plan, and how to work these out effectively.

Your sponsored projects officer may be able to recommend people in various departments to contact if you need to enlist their help for your project.

The Nuts & Bolts

Good project design requires robust research questions or goals, and it is helped along by the application of a logic model.

Robust research questions can be answered with data, are created in consideration of the literature, are focused, and are few in number.

Project goals are overarching, measurable statements of the long-term aims of the project; objectives are administrative structures, made up of activities that drive the goals forward.

Use a logic model to help design and organize the project so that the budget and narrative reflect each other.

Exercises: Working Toward Mastery

Create a research question or hypothesis for your project. Follow your disciplinary guidelines, and be sure that the question is clear and complete, based on the literature, measurable, and potentially of interest to a funder.

Create a logic model for a project based on this question. Follow the guidance provided in this chapter, as well as Case Study 1: Application of a Logic Model. Be sure to include goals, objectives, activities, and resources in a simple format, such as the following example:

 Table 3

Chapter Terms

Activities: Tasks that make up the objectives. Each activity is related to an objective, which is related to a goal. Ideally, each activity is represented on the budget, either as part of the request or as match.

Goals: The abstract, long-term, hoped-for accomplishments of the project, also called aims.

Logic model: A table, diagram, or flow chart designed to help break out activities and their interrelationships within a project. Logic models come in many varieties and can be used for many purposes.

Objectives: The organizational structures that push goals forward. Objectives are composed of activities.

Research question: A carefully defined question that combines the topic and methodology in a question structure that will be answered effectively by data.

Case Study 1

Application of a Simple Logic Model

Introduction

It is all very well to talk about logic models and how wonderful they are, but what does that really mean? What does it look like to design a project using a logic model, and how would you convert the result into a narrative and a budget?

This case study will start with the development of one research question for a community service project and the application of the research question to a simple logic model. It will then adapt the logic model to the project using the goal/objective/activity style of working as an example of using the logic model for a service project. Then we will develop a narrative outline and part of a budget using the result.

The example project is designed to assist under-resourced families deal with credit and finance issues more effectively. Perhaps based on the literature and observation we hypothesize that credit counseling would help these families manage their financial situations better. We decide to test this by providing services and measuring the results in terms of effects on the families.

Logic Model Using a Research Question

Research Question

Of course, we start with the research question. Here is what we have so far. Read it and think about what you might do to improve it.

Does credit counseling help under-resourced families manage their finances more effectively?

This is not very well defined in this question, is it? What does “manage their finances more effectively” mean? Does it mean avoiding foreclosure, saving money, or avoiding bankruptcy? Perhaps it means all of these things. Getting data on a savings account will probably be difficult; however, data on the presence of catastrophic financial situations may be less personal for participants to report.1

Does credit counseling help under-resourced families manage their finances more effectively avoid major financial disruptions?

This data will be probably be easier to manage and measure: Participants will simply be asked whether they have undergone major financial disruptions at follow-up. We must be sure to define “major financial disruptions” in the methodology section.

Now the question is, should we just be looking at under-resourced families? Perhaps there are many under-resourced families that are at risk for financial disruption based on their low socioeconomic status (SES) rather than lack of information. Credit counseling probably will not help much with this. Perhaps the project should seek at-risk families, those who are behind in their mortgages, credit card payments, or considering bankruptcy at whatever income level is presented.

Does credit counseling help under-resourced at-risk families avoid major financial disruptions?

Naturally there are many ways to change this research question to make it ready to pull the weight of a project. Some people prefer more detail, others less; however, we will proceed with this version of the research question for this case study.

Does credit counseling help at-risk families avoid major financial disruptions?

In working with a research question, I would adapt the first column of the logic model to read “Research Question” but leave the other columns intact.

Table 4

Objectives

Objectives are still the structural organization of activities that are actually performed, and in this case they drive the performance of the investigation of the research question. What objectives do we need to accomplish to answer this question with data? The first thing would be to provide credit counseling to families. But which families? Where do we find them? We need a recruitment plan, so I will add that to my logic model.

Next we consider providing credit counseling, the central objective of the project, and then consider how to build data-gathering processes into the proposal.

Table 5

Activities

What activities will we do to accomplish the objectives and therefore accomplish the goal?

For Item 1A, the question is, how do we recruit at-risk families? Have we even defined at-risk yet? That might tell us a lot about where we would conduct outreach. For now, let’s agree that we will need to perform some basic recruitment tasks:

Define what we mean by at-risk and create minimum levels of risk to receive services.

Publicize study services in appropriate magazines, online, and with organizations serving at-risk families.

Create a greeting process where participants will be welcomed and oriented to the study.

Item 1B, considering the issue of the credit counseling services, brings up entirely new questions. Who will provide the services? Where will they provide them? What is the study plan in terms of how many hours of assistance participating families receive? These questions form the basis of the intervention, and perhaps we have not yet worked the details out. In this case, we can include some notes and build on the project as we figure it out:

Decide who the credit counselors will be.

Acquire office space at a downtown university campus to provide services.

Determine how many hours of assistance participants will receive.

Finally, we must think about data gathering for the project. Again, at this early stage we may not have things worked out; however, we know generally what must be done:

Seek an external evaluator.

Create a data-gathering plan.

Among project staff, decide who will be responsible for data gathering and input.

Here is how the model might look so far.

 Table 6

Of course, as project planning proceeds, we will use this table to record additional detail. For example, once we figure out who will be doing the data gathering and input, we will record the position for Item 1Ciii.

Resources

Next, resources should be considered. What will we need to accomplish each activity? At this stage, it is best to consider all resources, including those that exist already or that your organization is providing, meaning match. Although you may not even tell the funder your institution will be providing this match or cost share, you, as the PI, should be quite aware of it, because you may need to confirm it with your university or college before you can make it part of your grant.

So, next to each activity category consider the resources that are required to carry out the activity, whether they exist in your organization already, whether you have access to them, and whether you will include them in your request to the funder. In areas where we do not know what the resources will be yet, we can put TBD (to be determined).

 Table 7

Logic Model Using Goals

If we are creating a service project and are not interested in pursuing a research question, we simply formulate the research question as a goal. A good goal has a very similar structure to a research question; it should be specific and measurable.

Goal: Provide credit counseling to help at-risk families avoid major financial disruptions.

Then we would make a few changes to the table.

Table 8

Using the Logic Model to Create a Narrative

Once fully filled out, the logic model can be used to create different sections of the narrative, especially the project description. Logic models are enormously helpful here because it is easy for the writer to elide important details when he is working from memory. One can forget the specifics, and one can also feel that they are so obvious that they do not need to be mentioned. Unfortunately, what is obvious to the PI may not be obvious to others, particularly not to the reviewers who only have the benefit of the proposal to inform them about the project. The logic model brings all the details to the view of the writer, allowing him to pick and choose which ones to include, exclude, and highlight.

The wonderful thing about this particular logic model is that it provides the outline structure automatically, especially if you remember to letter and number each entry.

Provide credit counseling to help at-risk families avoid major financial disruptions.

Recruit at-risk families.

Define what we mean by at-risk and create minimum levels of risk to receive services.

Publicize study services in appropriate magazines, online, and with organizations serving at-risk families.

Create a greeting process where participants will be welcomed and oriented to the study.

Provide credit counseling to participant families.

Define who credit counselors will be.

Acquire office space at a downtown university campus to provide services.

Define how many hours of assistance participants will receive.

Gather data on project efficacy and/or evaluation.

Seek an external evaluator.

Create a data-gathering plan.

Determine who will be responsible for data gathering and input.

Now I can begin writing a project description based on this structure.

To accomplish the project goal of [1]2 providing credit counseling to help at-risk families avoid major financial disruptions, project personnel will engage in three main program areas: [1A] recruitment, [1B] credit counseling, and [1C] program data collection.

The project defines [1Ai] at-risk families according to the following indicators, as defined by Ralph Smith in his 2012 study [indicate risk factors]. As such, families with the following risk factors will be recruited to the project and provided services:

Job loss of an adult

Chronic illness or death of job-holding adult

Recent divorce

Unmarried parent

[1Aii] Participants will be recruited through advertising as well as through contacts with social service agencies. . . .

We can write through this entire outline and create a clear, structured project description that will convey to the reviewers exactly what the project will entail. Then we can use the resources column to organize the budget.

Using the Logic Model to Create a Budget

Similarly, the logic model can be used to create a list of expenses or a budget for the project. Just copy and paste the Activities and Resources columns into a spreadsheet where they begin the budget. Add a Budget Lines column, and you will have begun the two tasks that most often seem insurmountable to the new PI: writing your narrative and creating your budget. We will dedicate two chapters each to budget and narrative development over the next four chapters.

 Table 9

1 I have left these research questions a little lean to make them easy to compare. Every one of them would require further development to actually function as a research question.

1 Of course, if I was actually carrying out this study, I would go to the literature and find out how others had measured improvement of the family financial situation.

2 All information in brackets is included to assist understanding of the reader and would not be included in an actual proposal.