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Foundation

# OFFICE OF FOUNDATION RELATIONS



# OSU Foundation

## Office of Foundation Relations

**Aaron Shonk**  
**Senior Director**



**Paul DuBois**  
**Director**



**Elizabeth Ocampo**  
**Director**



**Emily Payne**  
**Assistant Director**



**Adeline Hull**  
**Coordinator**

# Tips and Tricks Using Reviewer Feedback

## Agenda

- Feedback to Avoid Common Mistakes and Improve Competitiveness
- Specific Circumstances
- Getting the Most Out of Feedback

# AVOID COMMON MISTAKES



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# Avoid Common Mistakes

## Answer the questions! – follow the guidelines

- “Projects are not expressly research studies, and request funding for activities outside of Spencer parameters (e.g., request for funding book writing, curriculum or technology development, technology purchases, philanthropic support for nonprofits or other service providers, program evaluations).” *Spencer Foundation*
- “Projects are not clearly connected to education.” *Spencer Foundation*



# Avoid Common Mistakes

## Writing for the reviewer: remove jargon, write for non-experts, acronym etiquette

- Have someone in your field read your proposal draft and someone outside your field.
- Do your best to anticipate questions. This is where having not only a peer but also someone outside your field and someone from our office (a layperson) is a valuable resource to review your proposal.
- “Make the case to a non-expert. Make the motivation and outcomes broadly accessible.” *Google*
- “Use caution with acronyms. If a reviewer must keep referring to its original mention, it is a disadvantage.” *PhRMA Foundation*

# Avoid Common Mistakes

**Readability – formatting issues; inconsistencies; bad organization; all images, graphics, and figures must be legible and accessible**

- Some reviewers prefer printed copies. If you are up against page limits, do not compromise the legibility of your images and figures by compressing them. Do not make your reviewer’s job harder. Make sure quality of images, graphs, etc. are of high quality and readable—avoid red/green figures for potential colorblind reviewers.
- “Include analyses and explanations for all figures provided in the proposal.”  
*Muscular Dystrophy Association*
- “Bad formatting, bad organization, and proposals with spelling errors are submitted frequently.” *PhRMA Foundation*

# Avoid Common Mistakes

**Proofreading – have someone in your field who can assess the science and someone outside who can read for lay understandability**

- “Careful proofreading is essential for professional evaluation of the proposal. Give careful attention to correct citations of the literature, spelling and quality of pictures and graphs.” *US-Israel Binational Agricultural Research and Development Fund (BARD)*
- Do not overlook your publications list. Check for duplicate entries, spelling errors, formatting inconsistencies, etc. Reviewers look at this and may note it as a weakness in their comments.



# Avoid Common Mistakes

## **Clearly specify a problem – be specific; who, what, when, where, why**

- “Present clear objectives, well-founded hypotheses, and work plans that address the stated objectives.” *US-Israel Binational Agricultural Research and Development Fund (BARD)*
- “Clearly specify a problem. Good research is driven by a great problem or question, and a good proposal starts with a clearly specified one.” *Google*
- “Is the problem or need laid out clearly and concisely?” *New York Community Trust*

# Avoid Common Mistakes

## **Clearly specify a problem – be specific; who, what, when, where, why**

- “While the core ideas and goals are promising, there are not sufficient details in the proposal about the specifics of the research project that you will plan during the grant period that would enable you to bring innovative ideas to life.” *Spencer Foundation*
- “Little or no explanation for why specific methodological choices have been made.” *Spencer Foundation*

# Avoid Common Mistakes

## **SMART objectives: Specific, Measurable, Achievable, Relevant, Time-Bound**

- “Describe a specific, credible, relevant outcome. Try to identify a specific and appropriately sized outcome, to give us a clear notion of what the grant would be enabling. What will likely come to be that might otherwise not happen? While this outcome should be a decisive step towards achieving your vision, it generally won't be adequate to completely achieve it. It often helps to describe both the minimum that is likely to be accomplished and a potential best-case. Since picking the right datasets and test cases is often important, tell us which ones you plan to use.” *Google*
- “Use quantifiable metrics.” *Google*
- “Proposals should have well-developed and realistic execution plans.” *Google*
- “Please articulate how your findings will be actionable.” *Robert Wood Johnson Foundation*

# Avoid Common Mistakes

**Be realistic – hyperbole is not welcome; don't be overly ambitious with your timeline, budget, resources, partners**

- “You must have realistic timelines and show a justification for adhering to those timelines to complete the work.” *PhRMA Foundation*
- “The most common criticisms are ‘vague,’ ‘overly ambitious,’ ‘lacking preliminary results,’ or ‘unfocused.’” *US-Israel Binational Agricultural Research and Development Fund (BARD)*
- “Saying your proposal will produce a ‘paradigm change’ is unwanted hyperbole unless you are Darwin or Einstein.” *WM Keck Foundation*

# Avoid Common Mistakes

## Demonstrate your expertise

- Why are you qualified to do this research?
- “The tone of voice and content should match the PI’s experience level. Proposals that appear to be lifted from a senior PI are often received.” *PhRMA Foundation*
- “Showcase your expertise.” *Google*
- “Highlight why you (and your team) are best suited to take on your project.”  
*Google*

# Avoid Common Mistakes

## Define your project's impact, a.k.a. it's measurable societal benefit

- “Philanthropy can complement government-sponsored grants by funding bold young scientists with disruptive ideas that have the potential to revolutionize scientific processes and spur medical breakthroughs.” *Michelson Medical Research Foundation*
- “Be clear on how your research advances the foundation's goals and your own. If there is anything that makes you and your work unique, it is strongly recommended that you share it.” *Foundation for Child Development*
- “Does the proposed project have a credible chance of having a broad, lasting, or systemic impact?” *New York Community Trust*



# IMPROVE COMPETITIVENESS



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# Improve Competitiveness

## Put your project/problem in context – prior work and research agenda

- “Put the proposed work in context. Most funded projects also have support from other sources. To help us understand the expected impact of our support, please explain what funding you already have for this area of research and how the proposed work relates to your existing plans. Do you plan to build a capability for other research, provide a tool, reproduce a prior result, collaborate with others to try something out, follow up on a promising idea, or explore a new one?”

*Google*

# Improve Competitiveness

## Put your project/problem in context – society and scholarly literature

- “Does the PI display an understanding of the policy landscape and key players relevant to the project?” *New York Community Trust*
- “Describe, cite, and comment on the current state of research knowledge around the study topic or issue and how the research questions or line of inquiry are related to that current state of knowledge.” *Spencer Foundation*
- “Reflect on how the findings may influence the existing knowledge base, capacity to improve education, and/or key assumptions in the field.” *Spencer Foundation*
- How does what you plan to do set you apart from the work of your peers?

# Improve Competitiveness

## Describe scalability

- Is your research or program scalable? If so, how? What would that look like? What would you need to accomplish this?
- “Demonstrate how your project will grow and scale.” *Google*

# Improve Competitiveness

## Address Uncertainty in your Project Design

- “Interdependent aims are often not viewed favorably. Example: ‘If you fail Aim 1, it means you cannot continue to Aim 2.’ Address unexpected outcomes. ‘If this did not happen, what can we do instead?’ Anticipate potential outcomes—your plan B. ‘Should Aim 1 fail, this is what we can do...’” *PhRMA Foundation*
- “Address how the initial program components of iterative design proposals were developed and how you expect future needs will be established with each iteration’s new findings.” *Spencer Foundation*
- “Your aims must be logically presented.” *Muscular Dystrophy Association*

# Improve Competitiveness

## Be Forthcoming with Risks and Setbacks

- “Tell us how the research challenge(s) will be addressed. Successful research projects combine a great problem with ideas for solutions, too. We recognize that all the answers won't be known yet, but we'd like to feel that the direction has been established, and a plausible path has been identified. It's hard to have a big impact without taking risks, but please identify what the difficulties are likely to be and how you plan to mitigate them. It may help to explain how you succeeded in addressing analogous problems in other projects.” *Google*
- PIs should be upfront and honest if a project isn't going to be successful.
  - Present an alternative solution if one exists.
  - “No industry partner wants to waste money, so if the PI knows the project isn't going to work, inform the industry partner as soon as possible.” *Biogen*



# Improve Competitiveness

## Target population participation/perspective

- “Perspectives and input from the target population in your proposal is highly encouraged.” *Bellwether*
- “Make sure your target population is clearly specified in your proposal.”  
*Bellwether*
- “Not including sample size, or descriptions of research sites, participants, or recruitment criteria is a common error.” *Spencer Foundation*

# Improve Competitiveness

## Diversity, Equity, and Inclusion

- “Tell us how this research impacts an underserved community.” *Google*
- “Emphasize the diversity, equity, and inclusion in your proposal.” *Alfred P. Sloan Foundation*
- “As currently described, the central topic does not adequately center the possibility for systems transformation toward equity and/or the proposed idea(s) for a research project appears to be too narrow scope to lead to systems transformation toward equity at scale, or the connections between your project and systems change equity weren't adequately described.” *Spencer Foundation*

# Improve Competitiveness

## Clear and Concise Abstracts

- “The Abstract should offer concise information to those in the evaluation process who will not see the full proposal. Clearly state the research problem, the objectives, the proposed methodologies, and the expected contribution to the topic, field, area, etc.” *US-Israel Binational Agricultural Research and Development Fund (BARD)*
- “Provide a 2-3 sentence summary of your project in clear, easy-to-understand language at the beginning.” *Gerber Foundation*
- “Ensure your hypothesis is clear and easy to find.” *Gerber Foundation*
- “So what? If your hypothesis proves true, what effect will your research have, and how will this further the Foundation’s mission?” *Gerber Foundation*

# Improve Competitiveness

## Letters of Recommendation

- Use these as an additional justification for your expertise.
- View these as “bonus” character space to augment your qualifications
- “Do not submit generic letters of support; they must be sincere. A personalized letter demonstrates institutional support. The letter of support should reinforce that this is the PI’s work and original idea.” *PhRMA Foundation*
- “Provide detail in your mentoring/professional development plan (if applicable)—timelines, specifics—who, what, when, where?” *Medical Research Foundation*

# SPECIFIC CIRCUMSTANCES



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# W.M. Keck Foundation – The Basic Science Question

- **Grant that includes new instrumentation:** Not enough description about what the research hoped to study, needed more specificity: What chemical reactions? What do those reactions do? The proposal read, “We have a new toy, and we think it could solve a problem,” but the problem was not clearly defined.
- **Grant that advances a methodology:** The methodology isn’t the purpose of the grant. Instead, it should be viewed as the tool that answers a research question. If it’s the best tool for the job, that’s the one the PI should use, but it isn’t the reason the sponsor chooses your project to fund.



# W.M. Keck Foundation – The Basic Science Question

- **Reviewer Comprehension/IMPACT:** This one may have too narrow/niche a scientific question to explain the importance to Keck's board. The program staff sees the scientific merit, but the specifics of the research topic would be a difficult project to pitch to the board's lay audience.

**This balancing act between science-literate reviewer and the lay board or family members who make funding decisions is also part of the Murdock, Heising-Simons, and OceanKind processes, among others.**

# Spencer Foundation – Alignment of the Proposal Parts

- “While each component of the proposal is important, it is equally important that they are aligned with one another, and that the proposal shows those connections explicitly.”
- **Alignment between research question, project design, and analytical strategies:** “I'd like to see this research study funded. However, I think the researchers would do well to provide a stronger section on their analytic strategies and how those analytic approaches offer a powerful opportunity to address the research questions mentioned earlier in the proposal.”

# GETTING THE MOST OUT OF FEEDBACK



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# Stages of a Review Process

- **Technical review** = Check to see if the proposals follows all the grant guidelines
- **Individual review** = Qualitative review by an individual, sometimes scored against a rubric
- **Group review** = Comprehensive review of the body of proposed projects, how they connect to one another, and how – together – they meet the organization’s strategic outcomes

# Creating a Grantmaking Portfolio

When foundations make final funding decisions among a slate of good proposals, strategic outcomes are considered to build a portfolio of funded work that furthers the organization's philanthropic aspirations.

Non-RFP criteria considerations may include:

- Geographic distribution of the projects
- Project topic variety or priority
- Demographic distribution (of PI and/or project beneficiaries)
- DEI considerations

# Example: Marie Lamfrom Charitable Trust

- **Extra-RFP Criteria:** The program officer explained that the proposal was declined because the program it would support had little direct impact, especially on BIPOC and/or marginalized populations. The board saw several “pros” to the proposed program: PRAX is valuable and much needed, it is likely to be well-managed, has lots of other supporters, and it would be well-supported after the grant period. However, the lack of direct impact on beneficiaries, i.e., BIPOC youth, made it less competitive than other proposals.



# Common mistakes people make when getting feedback from funders

## 1. They don't ask for feedback!

Not all grantmakers can or will share feedback or reviewer comments, and most people never ask.

## 2. Those who ask for feedback ask the wrong questions.

Invariably, if you ask, “Why wasn't our proposal funded?” you'll get an honest and accurate response like: “Given the mix of proposals we were considering and the amount of funding available, there were other proposals that the review committee saw as a better fit for what we want to accomplish with our funding this time around.”

# Common mistakes people make when getting feedback from funders

Instead, ask:

**“Is there anything you can share from the review process that might help us strengthen this proposal and do a better job with our proposals in the future?”**

Consider where your proposal was eliminated during the review process. Was it 1) declined on a technicality, 2) because of poor scoring against a rubric, or was it 3) competitive until the final round? How might that determine what you do next with the proposal and/or the funder?

# Review Process Control

## **Things you can't control in the review process:**

- Who reviews the proposal and their personal preferences
- What other proposals are in the mix, and the quality of those proposals
- The reviewers' mental energy / How many proposals they had to plow through before they got to mine

# Review Control

## Things you can control:

- Following the RFP guidelines
- Focus and alignment with the funder's mission and goals
- Proposal projects that are unique, urgent, impactful
- Clear project plan with SMART objectives (specific, measurable, achievable, relevant, and time-based)
- Including the right personnel and partners to carry out the work
- Clear, vibrant, compelling language

# FINAL PLUG

**OSU Foundation is here to review your grant proposals before submission.**

- We can offer a lay-reader perspective.
- We understand how private foundations think about Impact and SMART objectives. We can counsel you on improving those aspects of your proposals.
- We can find background on who your reviewers will likely be and strategies for how to communicate more effectively with them.

# CONTACT US

[www.fororegonstate.org/foundationrelations](http://www.fororegonstate.org/foundationrelations)

**Aaron Shonk, Senior Director**

[Aaron.Shonk@osufoundation.org](mailto:Aaron.Shonk@osufoundation.org)

**Paul DuBois, Director**

[Paul.DuBois@osufoundation.org](mailto:Paul.DuBois@osufoundation.org)

**Elizabeth Ocampo, Director**

[Elizabeth.Ocampo@osufoundation.org](mailto:Elizabeth.Ocampo@osufoundation.org)

**Emily Payne, Assistant Director**

[Emily.Payne@osufoundation.org](mailto:Emily.Payne@osufoundation.org)

**Adeline Hull, Coordinator**

[Adeline.Hull@osufoundation.org](mailto:Adeline.Hull@osufoundation.org)



*Contact me with your questions!*



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**QUESTIONS?**

