Introduction to the Color-Coded Team Review
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Objectives

• Develop a common understanding of the Color-Coded Team review as part of the proposal development process

• Review the importance, timing, and stages

• Identify roles and responsibilities of team members

• Learn how to utilize this service
What is a color-coded team review?

- A review system to provide constructive, unbiased feedback to improve overall proposal quality and competitiveness with the goal of increasing award success rates.
- The GDSU offers blue, pink, red, and gold team reviews.
Proposal Development Process

**Phase 1**: Long-term Positioning (Multiple Leads)
- Acquisition Plan
  - 12-24 months

**Phase 2**: Opportunity Assessment (One Procurement)
- Sources Sought Announced
- Draft Solicitation Released (sometimes)
  - 6-12 months

**Phase 3**: Capture Planning
- Final Solicitation Released
  - 2-5 months

**Phase 4**: Proposal Preparation
- Solicitation Release
  - Proposal Development
  - Production

**Phase 5**: Evaluation
- Post-Submittal Activities
  - AWARD

**Team Reviews**:
- Blue Team Review
- Pink Team Review
- Red Team Review
- Gold Team Review
# Types of Reviews

<table>
<thead>
<tr>
<th>Review Type</th>
<th>Summary</th>
<th>Timeframe</th>
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<tr>
<td><strong>Blue Team Review</strong></td>
<td>A member of GDSU will review the narrative. At this point, the narrative is in outline form. The focus of the review will be to ensure all required sections are included with assigned writers, key persons are identified, and ensure there are no gaps in information.</td>
<td>10+ weeks before proposal due date</td>
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<tr>
<td><strong>Pink Team Review</strong></td>
<td>A member of GDSU will review the narrative and check for compliance to the RFP and identify major gaps. The narrative is typically in its first draft or 60-75% complete with tables and graphics in place. The focus of the review will be on content and to make sure there are no red flags that would prevent the proposal from being funded (compliance, competitiveness).</td>
<td>8-10 weeks before proposal due date</td>
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<tr>
<td><strong>Red Team Review</strong></td>
<td>The review team consists of 3-4 subject matter experts who will review the narrative from the sponsors’ perspective to ensure the narrative meets the objectives of the RFP, to outline strengths, and identify areas for improvement in order to make the narrative more compelling. The key focus of the review is on compliance, clarity, and responsiveness. The narrative needs to be in a final draft stage for review. The reviewers will meet with the PI along with the Red Team Manager for a facilitated discussion to share feedback.</td>
<td>6-8 weeks before proposal due date</td>
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<td><strong>Gold Team Review</strong></td>
<td>A member of GDSU will review the final narrative. If a red team review was conducted, this version would have all the changes recommended by that review incorporated into it. The reviewer will scan the document to ensure compliance and ensure there are not any unanswered questions prior to submission.</td>
<td>2 weeks before proposal due date</td>
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What is a Red Team Review?

- An established step in the proposal development process
- A critical assessment of the proposal to assess compliance and responsiveness to the RFP
- Results in a report of strengths, weaknesses, and deficiencies prior to submission
Who should have a Red Team Review?

- Resubmissions – already have feedback from the agency on what to improve
- Large Proposals
- Early Career Investigators
Red Team
Member Roles

Red Team Manager | PI and Proposal Team | Reviewers
Red Team Member – Roles

• Work with the PI to identify red team reviewers
• Seek commitments from reviewers
• Provide the reviewers with a FINAL draft of the narrative, guidelines for the review, evaluation form, and solicitation materials.
• Allow 1-week for the review
• Schedule a debrief meeting between the PI, proposal team, and reviewers
• Provide a summary of the discussion
PI- Roles

• Submit FINAL narrative draft to Red Team Manager 6-8 weeks before due date.
• Choose three to five subject matter experts to serve as reviewers who:
  • will bring a mix of relevant technical and management expertise,
  • have been through a peer review process either as a reviewer or having a proposal reviewed.
What makes a good team reviewer?

• Team Player!
• Understands and values the proposal development process
• Can read from an evaluators’ viewpoint
• Good analyst—really thinks about what he/she is reading
• Is willing to actively engage—to provide constructive comments and feedback (not just an academic critique)
What happens during the debrief meeting?

The Red Team Manager will:

• Conduct orientation for reviewers to ensure understanding of solicitation materials, objective of the review, and the review process
• Set the meeting tone and tempo
• Facilitate proposal evaluation process
• Facilitate resolution of disagreements among reviewers
• Compile and integrate results
• Debrief the proposal manager and team
Reviewer’s Commitments

• Commit time required for the review
• Analyze RFP in advance of review
• Follow Red Team Manager’s guidance
• Read objectively and provide appropriate comments to support the writing team
• Evaluate and score proposal using provided materials
• Discuss evaluation with Red Team members
• Keep the discussion confidential (within the team)
• Provide assistance if requested
Commenting as an Artform

Negative Comments

• “What the heck were you thinking?”
• “Fix this.” or “Ugh”
• “Weak”
• “Rewrite”
• “Are you kidding me?”
• “Why?”
• “BS”

Positive Comments

• “Why did you choose the consortium members you are proposing? Provide rationale for their selection.”
• “This is a good idea – but how will you execute it? Describe the steps required.”
• “This point seems to be inconsistent with the text in Section 2.1. Which is correct?”
• “You didn’t address the requirement to provide . . . If this is omitted, the proposal will be considered non-responsive.”
• “This might be easier to follow if you used a graphic rather than text.”
Evaluation Forms are a Significant Component of Effective Reviews

The Red Team manager will analyze the solicitation document to:

• identify all requirements,
• develop a form that mirrors what the funding organization might use, and
• focus on preparing questions or prompts that allow the Red Team reviewers to assess the proposal’s merit
# Evaluation Form

<table>
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<tr>
<th>Funding Opportunity:</th>
<th>Proposal Due Date:</th>
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<tbody>
<tr>
<td>Project Title:</td>
<td>PI:</td>
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<tr>
<td>Evaluator Name:</td>
<td>Date:</td>
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Please rank the following items. (1-weak, 5-strong)

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<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
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<tbody>
<tr>
<td>Introduction/Project Description</td>
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<td>Approach/Research Methods</td>
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<td>Timeline/Schedule</td>
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<td>Alignment/Fit with RFP</td>
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Strengths

Weaknesses

Recommended Improvements

Other Feedback/Comments
Best Practices for Effective Red Teams

- **Timing**: Review a proposal that is ready to review – Complete final narrative 6-8 weeks before submission

- **Commitment**: Ensure that all participants make the time available to participate

- **Attitude**: It’s not about finding what’s wrong; it’s about helping to make the proposal successful.
Red Team Review Process

- **Request Review**: 6-8 weeks before submission
- **Review Team Assembled**: 5-6 weeks before submission
- **Completed Narrative Ready**: 4-5 weeks before submission
- **Review**: 3-4 weeks before submission
- **Debrief Meeting**: 2-3 weeks before submission
- **Revise Narrative**: 2 weeks before submission
- **Submit**
- **Feedback**
Other Types of Reviews
Gold Team Review

• A member of GDSU will review the final narrative. If a red team review was conducted, this version would incorporate all the changes recommended by that review.
  • The reviewer will scan the document to ensure compliance and guarantee there are not any unanswered questions prior to submission.

• *Narrative needed 2 weeks before submission*
**Blue Team Review**

- A member of GDSU will review the narrative. At this point, the narrative is in outline form.
  - The focus of the review will be to make certain that all required sections are included with assigned writers, key persons are identified, and that there are no gaps in information.

- *Narrative/Outline needed 10+ weeks before proposal due date*
Example – AFRI Outline


The Project Narrative attachment must also include all of the following:

a. Introduction
Include a clear statement of the long-term goal(s) and supporting objectives of the proposed project. Summarize the body of knowledge or past activities that substantiate the need for the proposed project. Describe ongoing or recently completed activities significant to the proposed project including the work of key project personnel. Include preliminary data/information pertinent to the proposed project. This section should include in-depth information on the following, when applicable:

1. Estimates of the magnitude of the issues and the relevance to stakeholders and ongoing state/federal food and agricultural research, education, and extension programs;
2. The role of stakeholders in problem identification, planning, implementation, and evaluation, as appropriate; and
3. Reasons for performing the work at the proposed institution.

All works cited should be referenced (see Bibliography & References Cited in PART IV, C(3c)).

b. Rationale and Significance
1. Concisely present the rationale behind the proposed project;
2. Describe the specific relationship of the project’s objectives to one of the Program Area Priorities. Applications that do not address at least one Program Area Priority will not be reviewed; and
3. Clearly describe the potential long-range improvement in and sustainability of U.S. agriculture and food systems. These purposes are described under Purpose and Priorities in Part I, B. Any novel ideas or contributions that the proposed project offers should also be discussed in this section.

c. Approach
1. Objectives: All applications must include a statement of objectives or specific aims of the proposed project in clear, concise, complete, and logically arranged terms.
2. Methods: Explicitly state the procedures or methodology you will apply in the proposed project. This section should include, but not necessarily be limited to, descriptions of:
   a. Stakeholder involvement, if applicable, in problem identification, planning, implementation, and evaluation;
   b. Proposed project activities, listed sequentially;
   c. Techniques to be employed in this project, including their feasibility and rationale;
   d. Expected results;
   e. How extension and education activities, if applicable, will be evaluated;
   f. How data will be analyzed or interpreted;
   g. Plans to communicate results to appropriate audiences, including relevant scientific peers, stakeholders and the public, as appropriate;
   h. Pitfalls that might be encountered; and
   i. Limitations to proposed procedures.
3. Project Timetable: The proposal must outline all important phases as a function of time, year by year, for the entire project, including periods beyond the grant funding period.
Pink Team Review

- A member of GDSU will review the narrative to check for compliance with the RFP and identify major gaps. The narrative is typically in its first draft with tables and graphics in place.
  - The focus of the review will be on content and to make sure there are no red flags that would prevent the proposal from being funded (compliance, competitiveness).

- *Narrative needs to be 60-75% complete and is needed 8-10 weeks before proposal due date*
In Conclusion

- Reviews are a major milestone during proposal development.
- Reviews are opportunities to make continuous improvements.
- Reviews provide “fresh eyes” that can objectively examine the proposal.
- Reviews can increase the chances of award success.
Ready for a Review?

- Go to http://grants.cfaes.ohio-state.edu and select the “request services” tab.

Questions

- Please contact Shannon Hollis (hollis.69@osu.edu)