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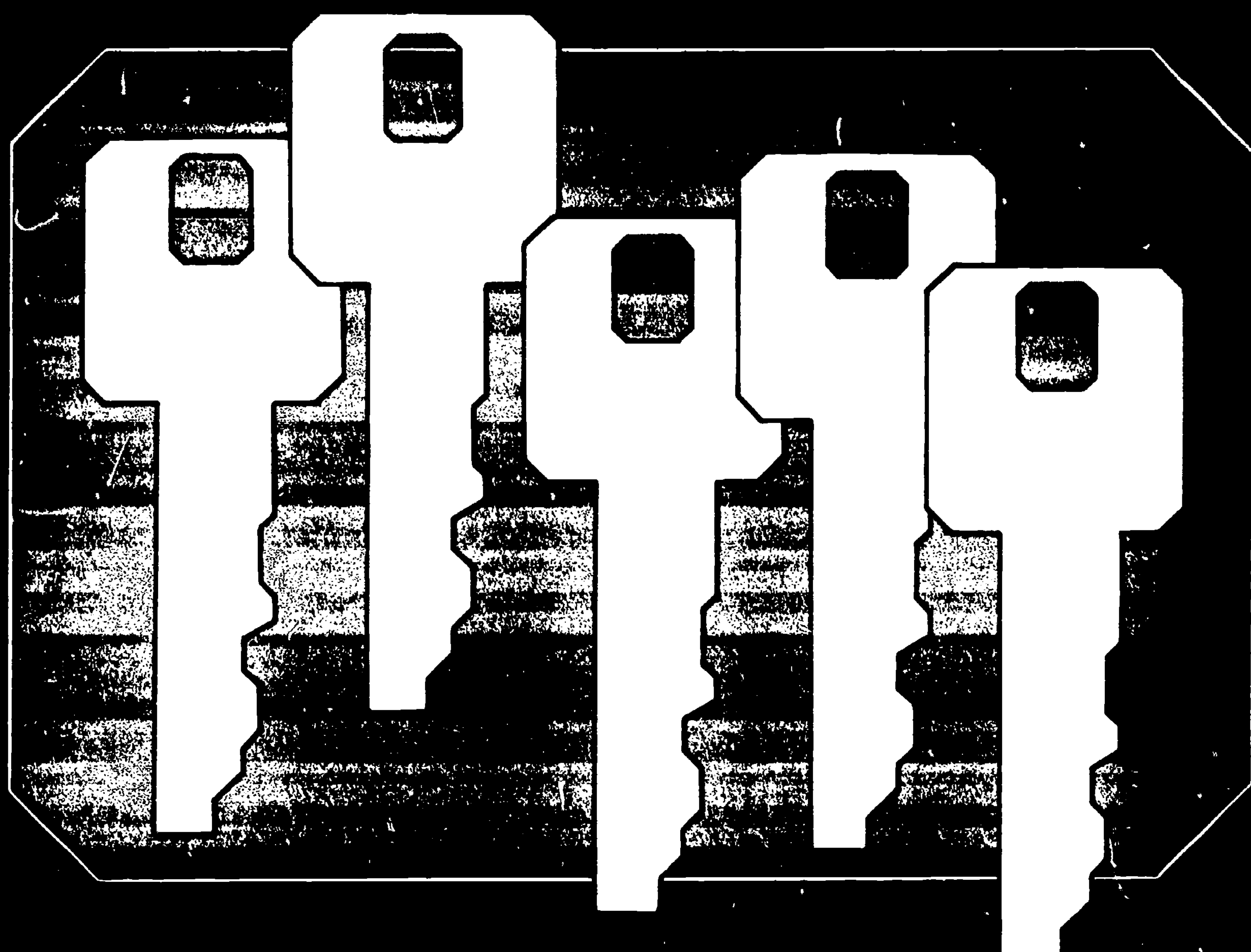
ABSTRACT

This module is intended to help guidance personnel in a variety of educational and agency settings plan and develop successful proposals to assist in financing the improvement of existing or future career guidance programs. The module is one of a series of competency-based guidance program training packages focusing upon specific professional and paraprofessional competencies of guidance personnel. Patterned after the Performance Based Teacher Education Modules developed at the National Center for Research in Vocational Education, the modules teach competencies for planning, supporting, implementing, operating, and evaluating guidance programs. The module follows a standard format that includes the following components: (1) an introduction that gives the user an overview of the purposes and content of the module; (2) a section that provides information about the module goal and a list of the competencies covered in the module; (3) a reading containing information on each of the competencies; (4) learning experiences consisting of an individual activity, individual feedback, and a group activity; (5) evaluation techniques that can be used to measure what workshop participants need prior to training and what they have accomplished through training; and (6) an annotated list of resources. Topics include maintaining sources of support, developing a rationale, selecting funding sources, writing a proposal outline, drafting a budget, and drafting a full proposal. (KC)

Write Proposals



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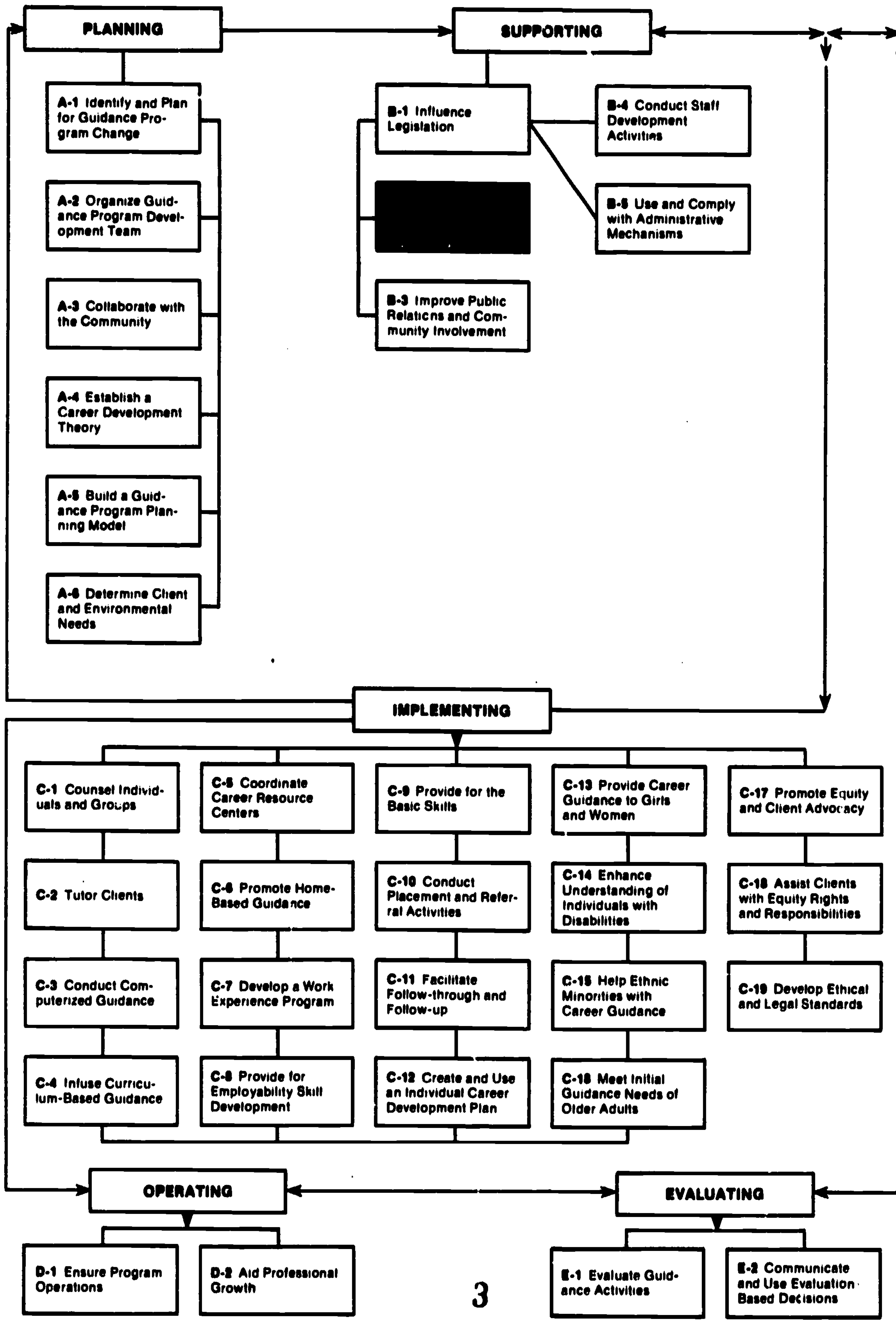

MODULE B-2

Write Proposals

Module CG B-2 of Category B — Supporting
Competency-Based Career Guidance Modules

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FOREWORD

This counseling and guidance program series is patterned after the Performance-Based Teacher Education modules designed and developed at the National Center for Research in Vocational Education, under Federal Number NE-C00-3-77 Because this model has been successfully and enthusiastically recieved nationally and internationally, this series of modules follows the same basic format

This module is one of a series of competency-based guidance program training packages focusing upon specific professional and paraprofessional competencies of guidance personnel The competencies upon which these modules are based were identified and verified through a project study as being those of critical importance for the planning, supporting, implementing, operating and evaluating of guidance programs These modules are addressed to professional and paraprofessional guidance program staff in a wide variety of educational and community settings and agencies

Each module provides learning experiences that integrate theory and application, each culminates with competency referenced evaluation suggestions The materials are designed for use by individuals or groups of guidance personnel who are involved in training Resource persons should be skilled in the guidance program competency being developed and should be thoroughly oriented to the concepts and procedures used in the total training package

The design of the materials provides considerable flexibility for planning and conducting competency-based preservice and inservice programs to meet a wide variety of individual needs and interests The materials are intended for use by universities, state departments of education, postsecondary institutions, intermediate educational service agencies, JTPA agencies, employment security agencies, and other community agencies that are responsible for the employment and professional development of guidance personnel

The competency-based guidance program training packages are products of a research effort by the National Center's Career Development Program Area Many individuals, institutions, and agencies participated with the National Center and have made contributions to the systematic development, testing, and refinement of the materials

National consultants provided substantial writing and review assistance in development of the initial module versions over 1300 guidance personnel used the materials in early stages of their development and provided feedback to the National Center for revision and refinement The materials have been or are being used by 57 pilot community implementation sites across the country

Special recognition for major roles in the direction, development, coordination of development, testing, and revision of these materials and the coordination of pilot implementation sites is extended to the following project staff Harry N Drier Consortium Director, Robert E Campbell, Linda Pfister, Directors; Robert Bhaerman, Research Specialist Karen Kimmel Boyle, Fred Williams, Program Associates, and Janie B Connell, Graduate Research Associate

Appreciation also is extended to the subcontractors who assisted the National Center in this effort Drs Brian Jones and Linda Phillips-Jones of the American Institutes for Research developed the competency base for the total package, managed project evaluation, and developed the modules addressing special needs Gratitude is expressed to Dr. Norman Gysbers of the University of Missouri-Columbia for his work on the module on individual career development plans Both of these agencies provided coordination and monitoring assistance for the pilot implementation sites Appreciation is extended to the American Vocational Association and the American Association for Counseling and Development for their leadership in directing extremely important subcontractors associated with the first phase of this effort

The National Center is grateful to the U S Department of Education, Office of Vocational and Adult Education (OVAE) for sponsorship of three contracts related to this competency-based guidance program training package In particular, we appreciate the leadership and support offered project staff by David H Pritchard who served as the project officer for the contracts We feel the investment of the OVAE in this training package is sound and will have lasting effects in the field of guidance in the years to come.

Robert E Taylor
Executive Director
National Center for Research
in Vocational Education

THE NATIONAL CENTER
FOR RESEARCH IN VOCATIONAL EDUCATION
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The National Center for Research in Vocational Education's mission is to increase the ability of diverse agencies, institutions, and organizations to solve educational problems relating to individual career planning, preparation, and progression. The National Center fulfills its mission by:

- Generating knowledge through research
- Developing educational programs and products
- Evaluating individual program needs and outcomes.
- Providing information for national planning and policy.
- Installing educational programs and products.
- Operating information systems and services
- Conducting leadership development and training programs.

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ABOUT THIS MODULE

ABOUT USING THE CBCG MODULES

CBCG Module Organization

The training modules cover the knowledge, skills, and attitudes needed to plan, support, implement, operate, and evaluate a comprehensive career guidance program. They are designed to provide career guidance program implementers with a systematic means to improve their career guidance programs. They are competency-based and contain specific information that is intended to assist users to develop at least part of the critical competencies necessary for overall program improvement.

These modules provide information and learning activities that are useful for both school-based and nonschool-based career guidance programs.

The modules are divided into five categories.

The GUIDANCE PROGRAM PLANNING category assists guidance personnel in outlining in advance what is to be done.

The SUPPORTING category assists personnel in knowing how to provide resources or means that make it possible for planned program activities to occur.

The IMPLEMENTING category suggests how to conduct, accomplish, or carry out selected career guidance program activities.

The OPERATING category provides information on how to continue the program on a day-to-day basis once it has been initiated.

The EVALUATING category assists guidance personnel in judging the quality and impact of the program and either making appropriate modifications based on findings or making decisions to terminate it.

Module Format

A standard format is used in all of the program's competency-based modules. Each module contains (1) an introduction, (2) a module focus, (3) a reading, (4) learning experiences, (5) evaluation techniques, and (6) resources.

Introduction. The introduction gives you, the module user, an overview of the purpose and content of the module. It provides enough information for you to determine if the module addresses an area in which you need more competence.

About This Module. This section presents the following information:

Module Goal: A statement of what one can accomplish by completing the module.

Competencies: A listing of the competency statements that relate to the module's area of concern. These statements represent the competencies thought to be most critical in terms of difficulty for inexperienced implementers, and they are not an exhaustive list.

This section also serves as the table of contents for the reading and learning experiences.

Reading. Each module contains a section in which cognitive information on each one of the competencies is presented.

1. Use it as a textbook by starting at the first page and reading through until the end. You could then complete the learning experiences that relate to specific competencies. This approach is good if you would like to give an overview of some competencies and a more in-depth study of others.
2. Turn directly to the learning experiences(s) that relate to the needed competency (competencies). Within each learning experience a reading is listed. This approach allows for a more experiential approach prior to the reading activity.

Learning Experiences. The learning experiences are designed to help users in the achievement of specific learning objectives. One learning experience exists for each competency (or a cluster of like competencies), and each learning experience is designed to stand on its own. Each learning experience is preceded by an overview sheet which describes what is to be covered in the learning experience.

Within the body of the learning experience, the following components appear.

Individual Activity: This is an activity which a person can complete without any outside assistance. All of the information needed for its completion is contained in the module.

Individual Feedback: After each individual activity there is a feedback section. This is to provide users with immediate feedback or evaluation regarding their progress before continuing. The concept of feedback is also intended with the group activities, but it is built right into the activity and does not appear as a separate section.

Group Activity: This activity is designed to be facilitated by a trainer, within a group training session.

The group activity is formatted along the lines of a facilitator's outline. The outline details suggested activities and information for you to use. A blend of presentation and "hands-on" participant activities such as games and role playing is included. A Notes column appears on each page of the facilitator's outline. This space is provided so trainers can add their own comments and suggestions to the cues that are provided.

Following the outline is a list of materials that will be needed by workshop facilitator. This section can serve as a duplication master for mimeographed handouts or transparencies you may want to prepare.

Evaluation Techniques. This section of each module contains information and instruments that can be used to measure what workshop participants need prior to training and what they have accomplished as a result of training. Included in this section are a Pre- and Post-Participant Assessment Questionnaire and a Trainer's Assessment Questionnaire. The latter contains a set of performance indicators which are designed to determine the degree of success the participants had with the activity.

References. All major sources that were used to develop the module are listed in this section. Also, major materials resources that relate to the competencies presented in the module are described and characterized.

INTRODUCTION

Career guidance is a rapidly changing field requiring you to be constantly on the lookout for supporting the best possible services for your clients. If you are fortunate, you have the available resources to fully support all the necessary career guidance services. However, most of us are not so fortunate and must seek **funding support** for special projects or services which enable us to add that margin of excellence to our programs.

The successful pursuit of external funding is fast becoming the mark of an effective program manager. **Identifying potential sources** for grant or contract funds and developing a winning proposal to acquire needed funds is a skill you must have if you expect to maximize your impact on clients. How many different sources of potential funding can you identify? How many different sources of support do you have in your program? Have you had success in developing winning grant applications?

The purpose of this module is to provide you with the skills to become a successful proposal writer. The skills are surprisingly simple to learn and generalizable to many different career guidance settings. By starting small and building gradually, you can easily increase external private sectors at local, state, and national levels. You can begin to open this vast potential for funding support by completing the reading and learning experiences detailed in this module.

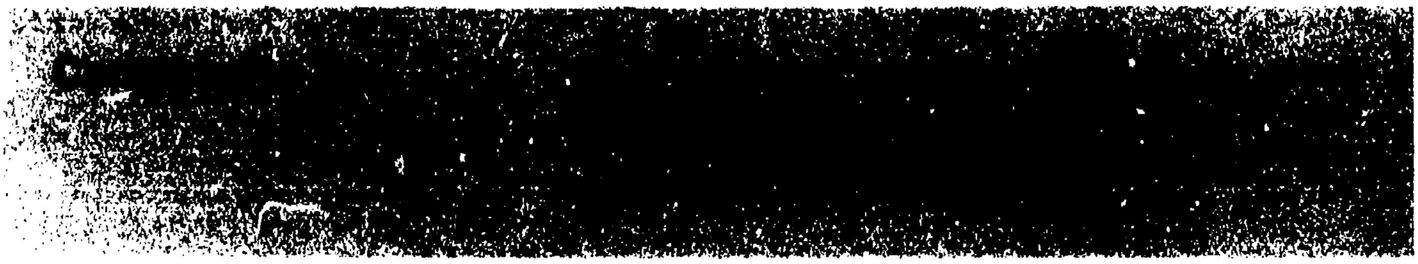
Proposal development skills are important for career guidance personnel to have because they can provide--

- the potential for **program expansion** and excellence;
- a program with **multiple sources of support**, thus lessening the impact of the loss of any one source of support;
- an avenue for the **professional development** of staff through conferences, publications, and professional associations; and
- increased **career mobility** for the career guidance professional.

There are a number of steps in the proposal development process (writing the grant application does not occur until late in the game). The basic steps are as follows:

1. Reading the **legislation** or foundation document that is the ultimate source of funding support.
2. Studying the associated **rules and regulations** that specify eligible applicants and allowable activities.
3. Obtaining **program information packages** from the public or private funding source.
4. Contacting the **people in charge** of funding programs to "try out" your ideas for support.
5. Developing a **proposal outline** or prospectus for the funding agency to examine.
6. Writing a **full proposal** if the preceding steps indicate a good chance of success.
7. Following up on **unsuccessful proposals** or implementation of projects.

Maintaining Sources of Support



The number and variety of external sources of potential support are astounding. More than 60 federal agencies annually make grants in excess of $75 billion. There are more than 26,000 private foundations providing grant support that also amounts to billions of dollars annually. Certainly there is no difficulty in identifying potential sources!

However, it is clear that you must **bring structure** to this vastness or your research for support will be random at best. Sample 1 is a matrix that may be helpful for recording these support sources.

Sample 1

Local		
State		
National		

In order to focus on the sources of support that would most likely be appropriate for you and your organization, keep these points in mind.

1. The amount of funds available from public governmental sources is much more than that from the private sector (foundations, industry).

2. Public agencies or institutions generally are more successful in acquiring funding for public sources, and private agencies or institutions are more successful with private sources.

3. There are generally more funds available from national and state sources than from local sources.

4. Local sources tend to focus on localized needs and problems. State and national sources may require your efforts to be less specific or more in line with their goals.

By using the matrix approach to potential funding sources you can examine your own situation and decide which "cells" are most appropriate to your purposes. For instance, a local YMCA interested in the career development of junior high students would probably begin by focusing at the local level and seek private support. This initial decision gives direction to the "Y" staff as to where to begin in its personal contacts and phone calls.

Most agencies or institutions will place themselves in **different cells** of the search matrix at different times depending upon the type of guidance activity they have in mind and their success or failure with given funding sources in the past. Therefore the file of support sources will be varied as to source and level.

How do you determine which documents you need and which people or agencies you should contact? Try the following techniques:

1. In reading your professional journals or newsletters, look for--

   a. legislative notes on **new or existing legislation** that has provisions affecting your sector,

   b. articles on **interesting projects** that have already been supported by public or private funds, and

   c. bibliographic entries that cite **sponsored projects** in career guidance.

2. Contact your colleagues to **seek their advice** on funding sources. You may find occasional resistance here, because some people may regard their sources as proprietary.

3. Read your local newspaper with an eye for **local, regional, or national efforts** for which monies have been made available.

The above three activities are always being conducted by the successful proposal writer--you must always be "tuned in" and "keep your ear to the ground." The game of external funding is run on a fast track.

As potential sources of funds are located, you should then--

1. write your public representative to get a copy of the federal or state law;

2. write for a copy of the foundation reports;

3. contact the foundation or public agency to obtain specific rules, regulations, and application materials if appropriate; and

4. contact program people to try out your ideas for sponsored projects.

Contacting people is an effort that never stops in the building of your file. It is an ongoing activity vital to your success in acquiring grants and contracts for your career guidance programs.

Resource documents are widely used by many groups and agencies and should be considered. Sample 2 displays some of these documents.

Sample 2

The Found

The Federal Regi

Career Education: A
book of Funding
by Charles W. Ryan

Document	Purpose	Source
[illegible]	[illegible]	U.S. Dept. of Labor, [illegible]
[illegible]	[illegible]	[illegible]

Developing a Rationale

The preparation of a **problem statement** is the first major activity in defining a career guidance program need. It is quite often the most difficult yet some would say the most important activity in the proposal development process. Developing a concise problem statement gives direction to the proposed effort and communicates clearly to prospective funding agencies.

A **problem situation** is based on one or more of the following factors:

1. A perplexing state
2. An undesirable consequence
3. A conflict which renders the selection from a set of alternative courses of action debatable

The **solution or proposal** for change suggests actions that--

1. clarify the perplexing state,
2. alleviate the undesirable consequence, or
3. resolve the conflict and help delineate the most appropriate course of action.

A problem statement, referred to by some as the statement of need, is designed to explain what needs to be done and why (Axelrod 1978). Essentially you are identifying a gap between **"what is"** and **"what ought to be,"** and will be proposing a method for the closing of this gap.

As you develop your problem statement, which may become part of a full proposal at a later date, you must present a convincing case for support. Try the hints below.

1. **Be specific** in the definition of the problem. You cannot cure the ills of the world with a few thousand dollars in 1 year. Limit the problem by focusing on--
   a. a specific client group,
   b. a particular career guidance problem, and
   c. association with a given agency (school, hospital, industry) which can serve the target group.
2. Document the problem with **factual information** if it is available. Cite similar efforts for related client groups in your area or across the country. Show you are in touch with the "state of the art" with regard to career guidance services to the group in question. It can be very embarrassing to discover that an identical effort has been supported in a neighboring town and you did not even know about it!
3. If there are other individuals or agencies that share your view of the problem and your proposed solution, seek **letters of support** from them. Consider using them as a formal or informal advisory group to help in the development of your proposal--and if funded, to provide direction and advice to the project. Funding agencies like to see collaborative planning--it shows you are working together and not duplicating services or wasting resources.
4. If you have had **previous experience** serving the group in question or using a given approach for a different group, highlight this capability. It demonstrates you have a successful track record and should encourage the funding source to "go with a winner."
5. Speak to the **generalizability** of your proposed effort. Will your efforts, if successful,

have implications for similar clients in other settings. If the solution of your problem has transfer potential to other people in other places, this makes your project of interest to state and national agencies.

The problem statement should flow naturally into your statement of goals and objectives for your project.

Speak to the **benefits of your actions** in terms of--

- individual growth in learning or attitude development,
- efficient and effective program operations, and
- societal and community benefits

Selecting Funding Sources

Using the resources that you developed under Competency 1, you can now identify a number of potential funding resources. The narrowing of this list to a manageable few that are **good prospects** is the next step.

One approach is to ask yourself a series of questions about the project you have in mind. In this way you can rule out certain sources and highlight other positive prospects. Sample 3 lists some of these questions.

Sample 3

Once a limited number of potential sources for funding have been identified, you should begin to make **personal contacts** with each agency. This personal contact cannot be overemphasized. Funding agencies are operated by concerned professionals who are serious about achieving maximum results with their limited resources. They want to have confidence in those projects they support and the individuals who operate them.

During the personal contact you can request more specific information about the application process and request the contact person to give you feedback on your ideas for a project. Most program people are very willing to do this and can provide you with helpful hints as to what "they would really like to see" in a proposal.

After these contacts are made, you should have a good idea of where your best chances are--and you have not even written a proposal yet!

Good proposal writers do not develop a full proposal until they are quite confident of its chances for funding.

Writing a Proposal Outline

Competency 4

Quite often you will be developing a proposal outline at the same time you are making the personal contacts to identify likely funding sources. A **clear and concise outline** of what you have in mind provides a good agenda for your discussions with potential funding sources and also helps you identify areas where changes need to be made.

It is important to **involve others** in the development of your summary outline because they can assist with good ideas and creative ways to implement a project. Also, it is good politics to keep everyone informed at each stage because you will eventually need their support and assistance to successfully implement your project.

There are a number of approaches you can take in developing a summary outline for a proposal.

One approach is to use the "Innovations Evaluation Guide" (Hull 1974) developed by the National Center for Research in Vocational Education. This pamphlet poses a number of questions concerning your ideas and the answers will assist you in translating these ideas to concrete program components. Sample 4 is taken from the "Innovations Evaluation Guide."

Sample 4

Summary Outline

Benefits

Individual Pupil Growth

- **Rate of Learning**

  What effect will the innovation have on the rate of student learning?

- **Scope of Learning**

  How does the innovation affect the number and type of learning experiences and/or skills to which the students will be exposed?

- **Attitude**

  What effect on attitudes can be attributed to the innovation (i.e., community, students, teachers, administrators)? Are there any experiences that assist the students in the development of their self-concepts and their abilities to relate to other individuals?

Program Operations

- **Efficiency**

  What information is available that will allow a cost-benefit analysis of the innovation? How does this analysis compare to the present status or other alternatives?

- **Effectiveness**

  What evidence indicates the innovation can achieve the required objectives to our satisfaction?

Society and the Economy

- **Entry and Advancement in an Occupation**

  What effect does the innovation have on increasing the opportunities to acquire job entry skills? Does the innovation include activities that will contribute to promotion and satisfaction on the job?

- **Economic and Social Efficiencies**

  What effect will the innovation have on productivity and costs to society in relation to such items as wages, occupational mobility, and school dropout rate?

- **Social Values**

  What attempts will be made to create an awareness of society in the students through the teaching of concepts concerning institutions, laws, cultures, and social problems?

- **Community Involvement**

  What benefits will accrue to the school and community after installing the innovation? What effect will the innovation have on such items as school and community relations, and the public image of the school?

Credibility

- **Validity**

  What evidence indicates that the innovation can achieve its objectives?

- **Reliability**

  Where has the innovation been tested previously? How similar are these [illegible] situation?

Assurance Contract

- **Warranty**

  To what extent does the developer or promoter warrant the soundness [illegible] Who is responsible for ensuring the services of the innovation?

  What types of consultation and services are provided by the sponsoring [illegible] the product?

Costs

Funding

- **Costs**

  What is the cost per unit over time? Will the innovation involve a [illegible]

- **Sources of Dollars**

  How can the innovation be funded? Must the cost be borne [illegible] available wholly or in part from state, federal, or public sources such [illegible] are the possibilities of reallocating present budget items to accom[illegible]

- **Availability of Dollars**

  What processes or procedures must be followed to acquire the necessary funding? Is the local educational agency in a position to expend its own money and be reimbursed later, or are funds from other sources available prior to expenditures?

- **Proportion of Dollars Available from Different Sources**

  In what proportion are funds available from other sources? Do matching funds have to be local funds?

- **Limitations on Use Other Than Local Funds**

  What limitations are placed on the use of other funds? Can funds be used for instruction only, equipment and instruction, or equipment, supplies, and instruction? Can funds be used for items such as construction, food, transportation, or consultants?

Time Considerations

- **Installation Time**

  How much time does it take to get the innovation working?

- **Lead Time**

  What deadlines are placed on activities prior to the operating date? How much time is necessary to order and receive items such as texts and materials? How much time is necessary to order, receive, and install equipment? Will the innovation require teacher orientation or advanced teacher planning time?

- **Planning Time**

  How much time must be devoted to planning by a teacher, coordinator, or administrator during each week?

- **Operation Time**

  What amount of time is required by the innovation in daily preparation, classroom activities, meetings, and so forth?

- **Cyclical Considerations**

  What characteristics of the innovation dictate that it be installed at a particular time during the calendar or academic year?

Installation Considerations

- **Acceptance**

  What barriers can be anticipated from the community, school personnel, or students concerning the installation of the innovation?

- **Complexity**

  What is the extent of involvement necessary to install the innovation; how many staff members, [illegible]

- [illegible]

  [illegible]

- [illegible]

  [illegible]

- [illegible]

  Is the [illegible] tional materials [illegible]

- **Feasibility**

  What evidence is there to [illegible]

- **Adaptability**

  What adjustments can be made to meet local conditions [illegible] ity of the innovation?

Organizational Change

- **Disruption of Routine**

  What interruption of routine is required by the innovation [illegible] retraining of teachers, sharing of facilities, and [illegible]

- **Effect on Staff Organization**

  What effect will the innovation have on the present [illegible] separate division or department?

- **Role Change for Individuals**

  What changes in duties and/or responsibilities are necessary [illegible] the innovation?

- **New Relationships among Groups**

  What new kinds of relationships among departments or grade levels [illegible] successful operation of the innovation?

Personnel Needs

- **Quantity of Staff**

  What additions to the staff are required? How many part-time or full-time people per unit [illegible]?

- **[illegible]**

  [illegible] are necessary for successful operation of the innovation? Do [illegible] knowledge of the community?

- **[illegible] by the Innovation**

  [illegible] for the development of certain role attitudes, skills, and [illegible] by personnel? Is the present staff capable of [illegible] personnel development necessary for the success of [illegible] available?

[illegible]

- **[illegible]**

  [illegible] sufficient? If not, what physical facilities are necessary to house the [illegible]

- **[illegible]**

  [illegible] necessary for installing the innovation?

- **[illegible] Other Programs**

  [illegible] innovation require close proximity to ongoing programs or [illegible] other hand, is a separate location desirable?

- **[illegible]**

  [illegible] to acquiring needed space for the innovation (i.e., donation, pur- [illegible] build)?

[illegible]

- **[illegible]**

  What are the major items of equipment or their components necessary for the operation and success of the innovation?

- **Software**

  What supplies are necessary for the operation of the innovation?

Budget Requirements

- **Personnel costs of administrative program and clerical staff and consultants**
- **Facilities costs of building space, equipment, supplies.**
- **Operating expenses of travel, communications, overhead.**

Sample 5 presents another approach to developing a proposal outline.

Sample 5

Proposal Outline

Proposer's Name: ______________________ **Telephone Number:** ______________
Address: ____ **Date:** ______________
____

Title of Proposal: ____

1. **Describe your proposed project.**
2. **List the project goals or objectives.**
3. **Discuss your plan of action, project design, or methodology.**
4. **Give the implications of project (potential value or educational [illegible]**
5. **If research is proposed, is it basic or applied in nature?**
6. **Conduct a literature search if it has not already been done.**
7. **Has this project been discussed with staff in any applica[illegible] funding groups? If answer is yes, please list contacts made [illegible]**
8. **Has any prior work been done in this area by the investigator [illegible] so, please explain. (Attach vitae if available.)**
9. **Determine the proposed time frame for the project? Include propo[illegible] dates.**

10. Give a rough estimate of the anticipated first-year budget, direct costs only.

Drafting a Budget

Competency 6 **Draft a preliminary budget of the proposed program [illegible] the scope of the project.**

The preparation of a realistic budget that relates directly to a proposed project is a critical activity. You must be sure to identify all the direct and indirect costs that would be required to complete your proposed project.

If and when you prepare a full proposal, the funding source will require a detailed budget. The budget categories may change a bit from agency to agency, but all require essentially the same information. In planning your budget you may wish to be generous in your estimates. Generally, specific budget line items are negotiated before a final funding agreement is reached.

Sample 6 outlines major budget categories.

Sample 6

Budget Categories

Personnel

- **Enter here all administrative, program professional, and clerical costs. Professionals are usually figured on a salary basis, with clerical staff figured on an hourly basis.**

- [illegible]

[illegible]

- [illegible]
- [illegible]

Travel

- [illegible]
- [illegible]
- [illegible]

Supplies

- [illegible]
- [illegible]
- [illegible]

Equipment

- Check the [illegible]
- Equipment [illegible]

Communications

- Costs for [illegible]
- Sometimes costs for [illegible]
- Advertising, brochures [illegible]

Services

- For some projects you may have to contract for services such as research surveys, computer services, third-party evaluations, testing services, and so forth.

Other Costs

- This is [illegible] line items.
- Items [illegible]:

  a. consultant [illegible]

  b. rent and utilities

  c. conference [illegible]

  d. publication costs

Indirect Costs

- Some [illegible] mail handling, [illegible] office furniture, [illegible] services, space, utilities, [illegible].
- Indirect cost rates are usually set by the funding agency and are figured at a percentage of your direct costs.

Drafting a Full Proposal

Competency 6

Produce a first draft of each section of the proposal that is consistent with the guidelines of the funding source, submit the draft to qualified reviewers, and make necessary revisions.

Finally! You are now at the point of writing a full proposal for funding a career guidance program effort. With all the preliminary work accomplished (potential sources, most likely source, problem definition, proposal summary, and tentative budget), the writing of a proposal is merely putting **"flesh on the skeleton"** that you have already constructed.

Axelrod (1978) has an excellent synopsis of the major components to be found in a complete project proposal. Sample 7 presents her approach in its entirety.

Sample 7

Typical Proposal Elements

One page [illegible] incl[illegible] fit most pro[illegible] major compo[illegible]

Major Proposal Components

I. Title page

II. Proposal abstract

III. Statement of problem

IV. Program objectives

V. Plan of action

VI. Staff

VII. Facilities

VIII. Evaluation

IX. Budget

The format of the proposal is dependent upon the specific criteria issued by the funding agency and existing guidelines should be followed closely. In the absence of a prescribed format, the one shown above may serve as a useful guide.

Information to be provided by each major component is described below.

- **Title page.** The reviewers' first impressions about the proposal will be formed from the proposal title. In order to make their initial reaction a favorable one, the title should be brief, yet descriptive. Other information that needs to be presented on the title page is (1) the name and address of the applicant, (2) the agency to which the proposal is being submitted, (3) the inclusive dates of the proposed effort, (4) the total amount of funds requested, and (5) the signatures of personnel who are authorized to sign legally binding documents.

- **Proposal abstract.** A proposal abstract is a brief summary of the statement of need, the objectives, strategies, and expected outcomes of the proposed plan. It should be written as concisely and accurately as possible. In most cases, the proposal abstract should not exceed 250 words. Proposal abstracts or summaries are frequently used as input into information system databases. The descriptions provided by information dissemination agencies are likely to be more accurate if a large amount of editing is not required.

- **Statement of problem.** This section of the proposal is designed to explain what needs to be done and why. The problem statement delimits the specific problem area and offers a promising solution. It is of utmost importance that the description of the need is closely related to the objectives and procedures described in later sections of the proposal document. In most cases, proposal writers err in the direction of presenting a need that is so global that it cannot be met by attainment of objectives described in the plan. In writing this section of the proposal it is important to keep in mind that the individuals who will be reviewing the proposal are not necessarily informed about the general problem area. Highly technical terms, if used at all, should be clearly explained.

  An adequate review of the literature is usually incorporated to give further evidence of the need for the proposed project and to reflect the current state of the art in attempted solutions. Overall, it is the applicant's job to convince the reviewer that a gap exists between "what is" and "what should be" and that the applicant proposes to fill it.

  Special emphasis should be given to the impact that the proposed project is [illegible] upon similar [illegible]. The greater the [illegible] the identified problem is [illegible], the more apt the [illegible] serious consideration for [illegible].

  Many proposal developers have found it useful to highlight their organization's [illegible] ties in solving similar or related problems in this section of the proposal. However, [illegible] detailed information about the applicant should be incorporated in the plan of [illegible] the proposal or attached as an appendix.

  In summary, this section of the proposal documents the need and provides the rationale for the proposed project effort. It represents the first major section of the proposal and is, therefore, the most important component of the proposal document. The skilled grantsperson will strive to ensure that this section compels the reviewer to read on.

- **Program objectives.** This section should be introduced by a statement of the overall intent of the proposed project that was defined in the previous section. In this section, the overall purpose of the proposed project must be further defined by specific, measurable objectives. The establishment of specific objectives to accomplish broad program goals is important to the success of any program. Without specifically stated program objectives, it is difficult to ensure that the program is focused upon need-based expected outcomes and almost impossible to determine whether program goals are ever obtained.

  This section of the proposal has become increasingly important—especially to federal agencies—because of the demand for accountability. In addition to the role that objectives serve in evaluation, they provide the framework for the selection of appropriate strategies, personnel, and resources. Well-written program objectives will specify the desired outcome, a particular time frame, and a minimum level of acceptability. The successful grantsperson will follow these criteria to help ensure that the proposed objectives are reasonable.

- **Plan of action.** One way to introduce this section, which spells out how the identified objectives will be met, is to describe the **overall approach** for the project. This overview is used to present the project design in general terms.

  At this point, it is important to keep in mind that the various proposal components are interrelated. The problem statement provided the answer to the "why"; program objectives, the "what"; and the plan of action must next answer the "how."

The proposal writer must identify specific activities aimed at accomplishing each program objective. A [illegible] may be employed to [illegible] required to [illegible]

Program Objective [illegible]	[illegible]	[illegible]
1.0 Conduct [illegible] on [illegible] February 1[illegible]	[illegible]	[illegible]
	1.2 Develop [illegible]	[illegible]

In the previous [illegible] major activity that [illegible] program objective [illegible] overlooked.

It is suggested that [illegible] project objectives [illegible]

Different individuals [illegible] program objectives [illegible] this approach.

It should be pointed out here that [illegible] individual [illegible] coordinated efforts of [illegible]

A realistic time schedule presented in this section of the [illegible] project has been carefully planned and that the [illegible] designated time period. The time schedule [illegible] ranging from simple bar charts (Gantt) to the use of more [illegible] such as PERT (Program Evaluation and Review Technique). The simple Gantt chart illustrated on the next page is recommended for the novice fund seeker.

Gantt Chart

Task	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.
Select workshop participants	X	X				
Develop program materials		X	X	X		
Identify workshop leadership		X	X			

As [illegible] in writing the plan of action section [illegible]

- **Staff.** This section of the proposal [illegible] information on the [illegible] of considerations: (1) Who will be the key project staff? (2) How will [illegible] (3) Are there [illegible] relationships [illegible]

  The proposal writer should clearly define who will have [illegible] for the project. In addition, the procedures for coordination of [illegible] the proposed [illegible] should be [illegible] to present this information when charts are used to supplement the narrative. An [illegible] include an organizational [illegible] the focus of [illegible]

  If [illegible] are to be used, their role and contribution to the [illegible] explained. Likewise, the role of advisory councils or other [illegible] are explained in this section.

  Key project staff member qualifications for successfully [illegible] should also be included. However, it is necessary to focus specifically on areas of their background and expertise that relate directly to their qualifications in terms of the proposed effort. In an attempt to provide greater detail, a common practice is to include curriculum vitae of key project staff in an appendix.

  Letters of agreement from consultants or other personnel external to the submitting agency should also be appended. The funding agency is thus assured of having their commitm[illegible]

- **Facilities.** [illegible] setting for the project should be clearly described in this section. The availability of supporting resources such as research libraries, computer facilities, and conference rooms that are needed to successfully conduct the project should be noted. It is a mistake, however, to address facilities and resources that are outside the realm of the activity being proposed. To illustrate, an auditorium with a seating capacity for 500 people is not likely to be considered an asset if the scope of work is limited to a research effort designed to produce a self-instructional module on small engine repair.

In other words, this section should be devoted to a description of the location and the nature of facilities that will be used **specifically** for the proposed project. If facilities are to be leased, it is important to explain the terms of the lease and to justify the request for leased facilities.

Within this section, the applicant should also describe the major equipment that is needed. An outline of what the agency already has and what it is requesting to purchase should be described.

- **Evaluation.** The evaluation design for the proposed project should serve to provide useful information to the project manager and the appropriate funding agency--both will be responsible for making decisions about the project. In addition, the evaluation should be designed to determine whether the program **accomplished its purpose**.

  The starting point of a good evaluation design is the program objectives. There are several items that should be described in relation to each program objective or, where the same means of evaluation are used, for a group of related objectives.

  These items include (1) the evaluation information that is needed, (2) the purpose that the information is intended to serve, (3) the source of information, (4) the means for obtaining the needed information, and (5) the means of analyzing and reporting the information. Other important elements to include in the evaluation plan are the identification of responsibility for the evaluation, how often or when the evaluations will be made, and what will be done with the evaluation results.

  If the evaluation is to be conducted by someone external to the program staff, it is essential that early collaboration between program staff and evaluators is documented.

  The evaluation section of a proposal is frequently the one that reflects the least thought and planning. Statements such as "an appropriate evaluation design will be planned by experienced evaluators" are antithetical to a winning proposal.

- **Budget.** The preparation of a budget to accompany the detailed project plan may be viewed best as the translation of other sections of the proposal into the common denominator of dollars. The budget should be based upon the stated program objectives and the plan of work.

  Most funding agencies require a detailed program budget for the first full-year of funding. If the proposed project is to be of longer duration, estimates by budget categories for the succeeding years are generally adequate.

  In planning all budget estimates, the experienced grantsperson keeps in mind that all proposed budgets may have to be cut regardless of program merit. Although not an openly recognized practice, budgets are frequently constructed on higher estimates of cost than may actually be anticipated.

  The funding agency may have specific forms for submitting budget requests. Most often, the categories include the following:

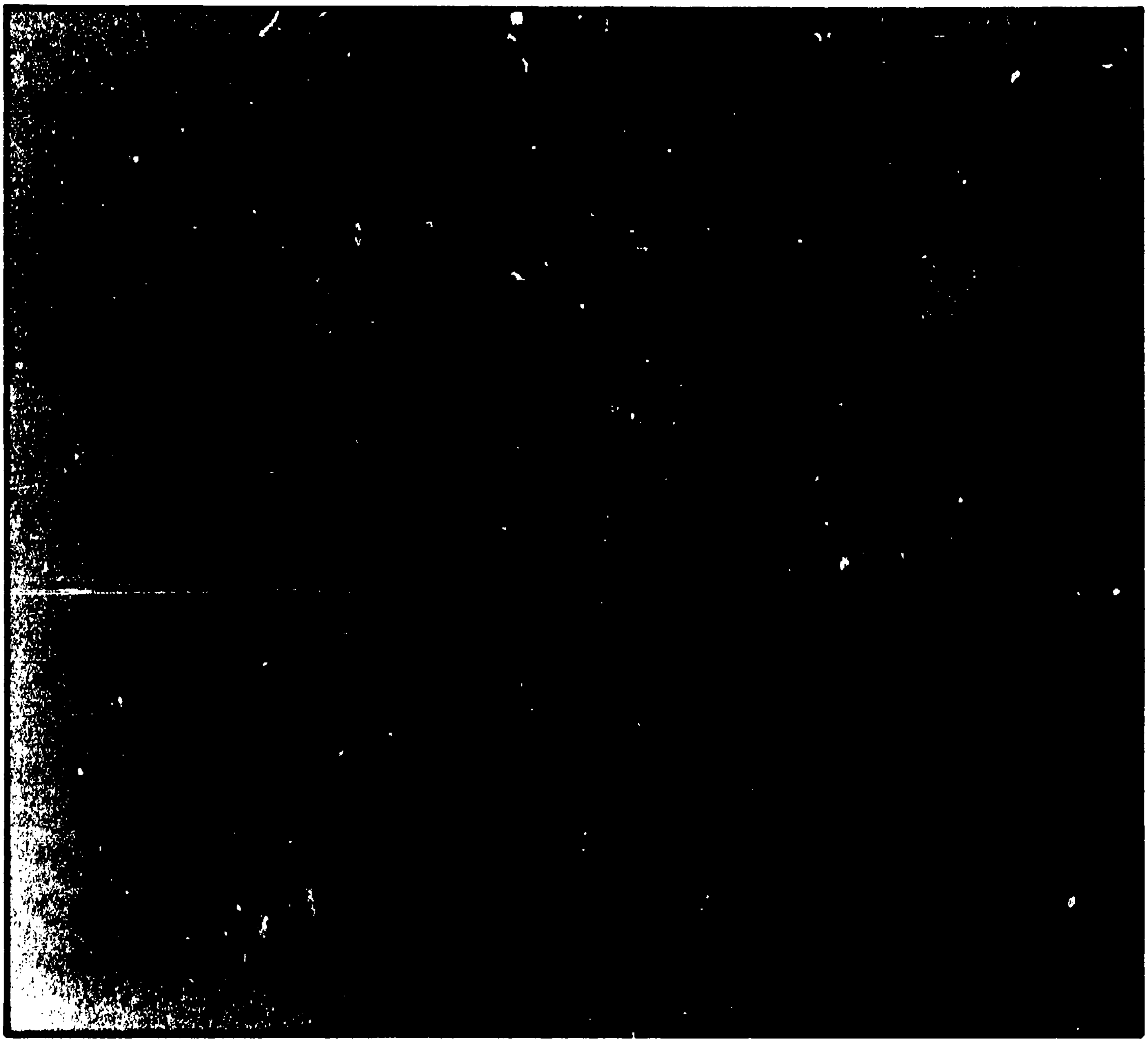
  - Personnel
  - Employee Benefits
  - Travel
  - Supplies
  - Equipment
  - Communication
  - Services
  - Indirect Costs

[redacted]

Learning Experience 1

Maintaining Sources of Support

OVERVIEW



INDIVIDUAL ACTIVITY **Build an acquisition plan for your resource file.**

Prior to starting this activity, read Competency 1 on page 7. In this activity you will ask yourself a series of questions regarding the who, what, when, where, and why of your activities and those of your organization. The purpose of this "self-check" is to define your place in the world of career guidance in terms of your base of operations, the clients you serve, and the services you do or could provide.

1. Public or private? ____________________
2. Urban or rural? ____________________
3. Type of institution? ____________________
4. Clients served? ____________________
5. Age level? ____________________
6. Sex? ____________________
7. Handicapped? ____________________
8. Disadvantaged? ____________________
9. Type of services provided? ____________________
10. Professional groups to which you belong? ____________________
11. Journals you receive? ____________________

With the above questions answered, review sample 2 on page 9 to determine the documents that would be most useful for you to have in your resource file. Make a list of these documents.

Also, identify four colleagues in your field whom you can contact to discuss grant-related activities.

INDIVIDUAL FEEDBACK

Compare the list of resource materials that you selected for your resource file with those of other individuals. Try to identify a person who is from a like or similar environment to see if you agree on the best resources available.

GROUP ACTIVITY

Note: The following outline is to be used by the workshop facilitator.

Facilitator's Outline	**Notes**
A. Starting Point	
1. Indicate that the participants will be working in small groups to use resource materials in locating potential sources of support for grant proposals.	
2. Review with the participants the materials or resource documents available to them in their search. Make reference to sample 2 on page 9.	Sample copies of some of these documents are found in Modules CG B-1, *Influence Legislation* and CG B-5, *Use and Comply with Administrative Mechanisms*.
• *Catalog of Federal Domestic Assistance* • *Federal Register* • Copies of selected legislation • Copies of selected journals • *The Foundation Directory* • *Career Education: A Handbook of Funding Resources* • *Catalog of Local Foundations* • *Annual Register of Government Support* • Other special documents that may relate to the particular workshop audience	

Facilitator's Outline	Notes
B. Small-Group Work 1. Have participants work in small groups to identify probable sources for support for one of the following problems. **Problem 1** You are with an adult basic education program in an urban area. Funds are provided for the basic skills, but support for career testing and guidance is minimal. Most of your clients are nonminority, middle aged, and balanced between males and females. Some are economically disadvantaged. Your base of operation is a local vocational school. Hunt for potential sources of funds. **Problem 2** You are in a rural area of an agricultural state where the small farms being bought out by large corporations. The youth of this area have had little variety in career exposure but their work habits and attitudes are good. Search for support for a career exploration program for these young men and women. 2. Reconvene groups and ask them to discuss their responses. 3. Point out that many potential sources of funds can be easil, identified. The next step of personal contact will reduce the list substantially. One should never "shotgun" a proposal to all potential sources.	If possible have two different groups working with each problem to see what similar/different sources are identified.

Learning Experience 2

Developing a Rationale

OVERVIEW

INDIVIDUAL ACTIVITY **State a career guidance problem your clients face and list the associated goal(s).**

Review the reading for Competency 2 on page 11. As mentioned, your ability to sense a perplexing state, conflict, or discrepancy between "what is" and "what ought to be" is a critical step in developing a request for external funding. However, many people can sense a problem, but are unable to articulate the state of affairs beyond a fuzzy notion that "something is wrong and something ought to be done about it." Define the need and identify a noble goal to right the need and you have the key ingredients for a successful proposal.

Think of the client group you serve and the biggest problem they face that could be alleviated through career guidance? Complete the following worksheet.

Worksheet

Problem Statement

1. State the client group. ____________________

2. State a problem they face. ____________________

3. If this client group were to overcome this problem, how would you know it? What would be happening? ____________________

4. What's happening to the client group now? ____________________

5. What facts and figures can you get to document the problem? ____________________

6. Who else in your community or profession can attest to the problem? ____________________

7. Have you or others had success with this client group in the past? ____________________

Now develop a clear and concise (no more than 100 words) statement of the problem. What goal would you set for the resolution of this problem?

Does your problem statement specifically identify the target population to be served?

Is the problem statement clear, concise, and understandable? Have someone read it and try to explain what they think you mean. Is the feedback what you expected?

Have you used data and "authorities" in the field to help provide evidence for the problem?

If the goal is achieved, will the problem be solved?

Note: The following outline is to be used by the workshop facilitator.

Facilitator's Outline	Notes
A. Starting Activity 1. Divide the group into 2 groups of up to 10 participants each. 2. Indicate they are both going to work on the same situation for the purpose of developing a problem and goal statement. 3. Indicate that the final activity will be a presentation by one member of the group. The purpose of the presentation is to present the most forceful and convincing statement of the problem. The facilitator will declare a "winner" with reasons for his or her judgment. B Small-Group Work 1 Have each group complete the handout. Problem Situation on page 37. 2 Reconvene groups and ask each one to present its problem statement and goal.	

Handout

Group Number ____

Problem Situation

Students in the high school are dropping out of school before graduation. Their rate of unemployment is high and their job mobility is also high.

You are to operationalize this problem situation with real or plausible facts and figures. Also, develop a goal to solve the problem. Review the reading for Competency 2 on page 11.

Problem Statement:

Goal:

NOTES

Learning Experience 3

Funding Sources

OVERVIEW

[illegible]

GROUP ACTIVITY

[illegible] public and two private sources to pursue for [illegible]

As you have probably discovered, it is easy to locate a number of funding sources that seem, at first glance, to be likely prospects for your career guidance proposal. In fact, your chances of success will depend largely on your ability to narrow this list to a few that closely match your proposed project.

The narrowing process is really a refinement of the approach for identifying potential sources of funding covered under Competency 1. Review the readings for Competency 1 on page 7 and Competency 3 on page 12.

Given that you have an idea for a particular grant application for your career guidance program efforts, use the resources in your library to select two public and two private sources for funding that seem to show good promise. Give reasons for their selection.

Remember to use specific descriptions about your project to help narrow the list.

Have you selected two public and two private agencies?

Did you consider the following factors?

- Type of institution with which you are associated
- Geographic location
- Client group by age, sex, handicap, and so forth
- Particular service to be provided

Did you use any other unique characteristics of your potential project to help narrow the choice? If so, what was this factor?

Note: The following outline is to be used by the workshop facilitator.

Facilitator's Outline	**Notes**
A. Setting the Stage 1. Indicate that personal contact with a potential funding source is critical for two reasons. • You can determine if your grant idea meets their criteria for support. • You have an opportunity to build rapport based upon your capability to perform career guidance work.	

Facilitator's Outline	Notes
2. Divide the participants into groups of 3 to role-play a first contact with a funding agency. There are 3 roles to be played. • The agency professional • The person seeking information about the appropriateness of the grant idea • An observer to provide feedback to 1 and 2 when the contact discussion is complete	
B. Role Playing	
1. Ask each member of the group to take 10 minutes to outline an idea for a grant application. Include the following: • Problem • Objectives • Methods • Budget	Encourage participants to review the reading for Competency 3 on page 12.
2. Cycling the roles, have each person "contact" the potential funding agency to inquire concerning the appropriateness of the grant idea. The conversation should be carried by the person interested in the grant. That person is trying to create a good image and find out all the possible information regarding the agency, its priorities, and feedback on the grant idea. Allow about 5 minutes for each contact discussion.	Tell the person playing the agency role that the "narrowing" process has occurred and this agency is a likely funding source for the grant in question.
3. Have the observer provide feedback to the person seeking the grant information on the effectiveness of the interrogation.	
C. Group Feedback	
1. Reconvene the group and make a list of the major categories of topics/issues that are raised in the initial agency contact. Ask if participants can add to the list.	
2. Ask if the participants are now more confident in contacting a potential funding source in terms of what they are expected to say and the kind of information they are seeking.	

Learning Experience 4

Writing a Proposal Outline

OVERVIEW

GROUP ACTIVITY

As you approach potential funding agencies, it is important that you have given some time and thought to defining the major parameters of your proposed project. In this way you can be more specific in the questions you ask a prospective funding source and your contact can then recommend more specific modifications.

Review the reading for Competency 4 on page 13 and develop a summary outline for a proposed project you have in mind. Select one of the suggested outlines for completing this activity.

1. Is your target group well defined?

2. Are the two or three key objectives obvious and well spelled out?

3. Does the approach you propose make sense?

4. Can you relate to other projects or individuals who have conducted similar activity?

5. How many staff members will the project require?

6. How much will it cost?

Note: The following outline is to be used by the workshop facilitator.

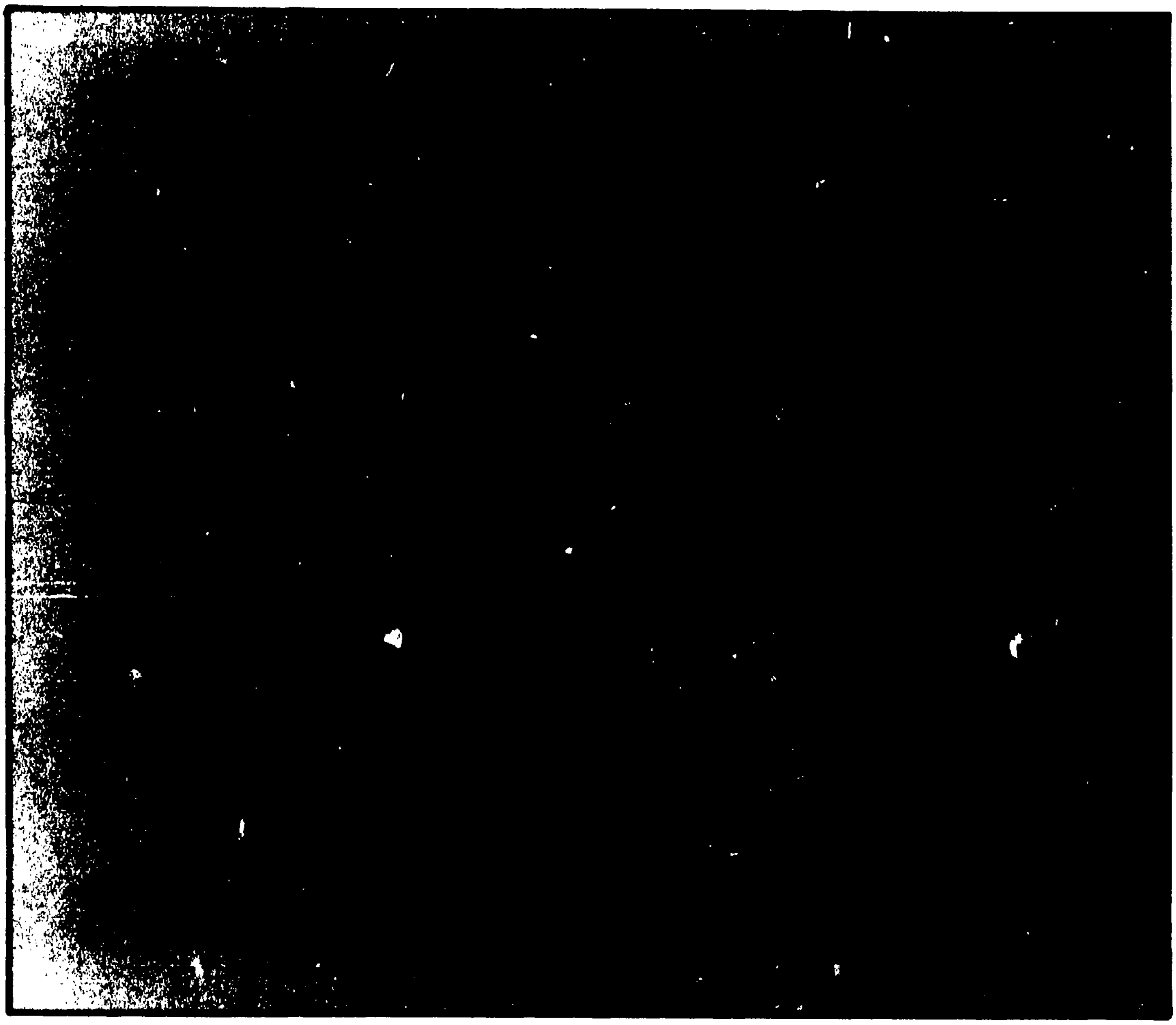
Facilitator's Outline	**Notes**
A. Purpose 1. Explain that it is important for proposal developers to be able to generate alternative ways of defining problems, identifying benefits, and establishing different approaches. The purpose of this exercise is to demonstrate how many different items a group can generate. It can also demonstrate, very vividly, a good reason to pull together a planning group as one develops a proposal. 2. Have participants review the reading for Competency 4 on page 13.	

Facilitator's Outline	Notes
B. Group Activity	
1. Give the group the following situation: "A career guidance counseling staff wants to develop a strong vocational assessment and career exploration program for prisoners in a correctional facility."	
2. Elicit ideas in the following areas using the brainstorm technique: a. **Problem definition**--different ways to document/illustrate the problem. b. **Benefits**--ways in which individuals, institutions, and society benefit from a successful career guidance effort for these clients. c. **Approaches**--different ways of operating such a project to obtain the benefits.	Write the ideas on large sheets of paper. Hang the completed pages around the room as the group generates its ideas.
3. Discuss and summarize the results of the brainstorming session.	

Learning Experience 5

Drafting a Budget

OVERVIEW



Review the reading for competency 5 on page 20 that indicates the process for developing a preliminary budget for projects.

Now read the sample proposal for a career guidance project on page 49 or another proposal available to you. After you have studied the proposal carefully, develop a budget that you feel would be adequate to accomplish the project as proposed. Do not look at the budget on the last page of the proposal when reading the sample proposal. Be sure to cross-check your work against each of the line items discussed in the reading.

PROPOSAL FOR DEVELOPING A CAREER RESOURCE CENTER

I. Title Page

Title:	Development of a Career Resource Center
Funding Source:	Career Development Unit Vocational Education and Career Development Services Michigan State Department of Education Box 928 Lansing, Michigan 48904 (517) 373-3370
Initiator	Mr. Francis Bebow, Principal Slate Run High School 271 Stone Drive Slate Run, Michigan
Project Director:	Ms. A. J. Weber, Counselor Slate Run High School 271 Stone Drive Slate Run, Michigan
Funding Period	October 1—September 30
Total Funds Requested:	$5,000.00
Date Submitted:	May 15

From Axelrod Valija Drier Harry Kimmel Karen Sechler Judith *Career Resource Centers* Columbus OH The National Center for Research in Vocational Education 1977

II. Proposal Abstract

This project is designed to plan and begin operation of a career resource center. This center will serve as a primary career guidance service and information center for students, parents, teachers, and community members as the Slate Run School District attempts to meet its expressed needs.

As a result of the career resource center, the 2,100 students at Slate Run, their teachers, parents, and others will be able to obtain much more useful information and professional assistance. This center is viewed as a service arm of the Guidance Department, and it will also be helpful to the district's career education efforts as well as to all curriculum departments.

III. Introduction

A. *Background and Organization*

The Slate Run Public School District has long been recognized by educators in the state as an innovator and leader in the area of career guidance. It has demonstrated many techniques that have been adopted by numerous other medium-sized schools in this state.

One major finding of the district's career guidance needs assessment was a marked interest and demand for increased services and materials by parents, community members, and teachers.

To this date Slate Run High School has been operating a very traditional library service with most of the volume in the senior high school building. Our six elementary and two junior high schools have not had the services they have needed and expect to need in the future.

It is our plan that through the use of a career resource center we can amass our limited resources to meet the increased career resource and service needs expressed by our 2,100 students and 72 faculty members. It should also be pointed out that our city's business leaders, city council, and the Slate Run School Board have fully endorsed our proposed plans.

B. *Statement of the Problem*

The career resource center has proven to be an effective means of impacting on the career development needs of individuals in Michigan. At Slate Run High School the career development focus is on increased self-understanding, exploration experiences, decision-making skills, and career planning and preparation.

The career resource center is a viable method of providing increased information and services to students and community members to promote their development in positive directions.

Although the career resource center has gained acceptance here in Slate Run, a need remains for a plan and the resources to systematically and logically implement and evaluate a career resource center. This need is based upon a recent career development needs assessment study. Sixty-seven percent of the students in grades nine through twelve indicated that they need increased career information. Seventy-two percent of the parents indicated that they need school assistance in working with their children to aid them in their career planning and decision making. Seventy-eight percent

of the teachers indicated a need for materials and inservice related to career development. A locally developed career resource center designed to assist these persons will fulfill these needs. The career resource center would provide basic information and services to our school district that would enhance our existing career education and guidance programs. In addition, it would provide opportunities for community members to become involved in the career development of youth and adults.

C. *Program Objectives (For the Center)*

1. To acquaint students with general and specific career information.

2. To develop student profiles with regard to interest, values, aptitudes, etc.

3. To acquaint students with available educational information including college, university, technical college, and vocational institutions and programs.

4. To assist students in their decision-making process by providing the needed information, experiences, and guidance assistance.

5. To aid parents in their efforts to help their children plan, experience, and make career decisions.

6. To assist the teachers in the area of infusing their curriculum with guidance information and techniques.

7. To assist employers in placing students in work experience and work study programs and part-time and full-time employment.

IV. Plan of Action

The following plan of action projects how it is intended to organize and begin operation of the career resource center during the school year. A time line and operational objectives are presented below.

Career Resource Center Time Chart

	1977				1978							
	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.
1.	– – –	– →										
2.	– –	– – –	– →									
3.			– – –	– →								
4.	– –	– – –	– – –	– →								
5.			– –	– – –	– – –	– →						
6.				– –	– →							
7.					– –	– – –	– – –	– – –	– – –	– – –	– – –	– →
8.								– –	– – –	– – –	– – –	– →
9.											– – –	– →

Operational Objectives

1. Hire and assign staff and volunteer help.
2. Prepare room and locate district materials and equipment.
3. Purchase needed materials and equipment.
4. Develop all operational procedures for center.
5. Promote the availability of the center.
6. Conduct inservice training on center use.
7. Operate the center.
8. Evaluate the center.
9. Develop second-year proposal.

(In a completed proposal each objective should be fully developed with descriptive narrative.)

V. Staff

The career resource center will be managed by one half-time counselor on a prearranged schedule. This one half-time counselor position will be accomplished by rotating our district's three counselors into the center on a 10:00 a.m. to 2:00 p.m. basis. One half-time paraprofessional will be made available to cover the period when the counseling staff is not in the center. Additionally, the district will provide a full-time typist. The center will also attempt to have an appropriate number of students and community volunteers in the center at no charge to the State Department of Education.

VI. Facilities

The career resource center will be developed through the conversion of a 20' x 23' classroom which is located adjacent to the school library. The room will be fully painted, and appropriate electrical wiring will be installed.

VII. Evaluation

With the assistance of a paid outside consultant, three types of evaluation data will be collected: (1) impact data that relates to established goals, (2) student, teacher, and parent opinions, and (3) data related to center operation and management. A final evaluation report will provide recommendations for program improvements.

VIII. Budget

		State Requested Funds	In-Kind Contributions
A.	Staff		
	1. salaries (trained paraprofessional at half time)	$2,000.00	
	2. clerical assistance (1 full-time)		$ 6,000.00
	3. counselor (half-time)		$ 7,000.00
	4. evaluation consultant	$ 200.00	
B.	Equipment		
	1. chairs	$ 200.00	
	2. MOIS reader	$ 160.00	
	3. book shelving	$ 230.00	
	4. DuKane cassette A-Vmatic (sound) filmstrip projector	$ 281.00	
	5. tables (3 @ $75.00)	$ 225.00	
	6. equipment (general)		$ 1,400.00
	7. furniture (tables/chairs)		$ 2,300.00
	8. reading carrels (2)	$ 332.00	
	9. material racks and bulletin boards	$ 220.00	
C.	Communication		
	1. telephones ($10.00 per month)		$ 120.00
	2. postage (surveys, etc.)	$ 65.00	
D.	Duplication	$ 60.00	
E.	General Supplies	$ 100.00	$ 300.00
F.	Materials (films, tapes, booklets, posters, etc.)	$ 700.00	$ 4,500.00 (existing inventory)
G.	Evaluation materials		
	1. self-directed search	$ 120.00	
	2. work values inventory	$ 36.00	
	3. Strong/Campbell interest inventory	$ 71.00	
	Funds Requested $5,000.00	$5,000.00	$21,620.00

INDIVIDUAL FEEDBACK

Compare your budget against the actual budget developed for a given proposal.

Take the budget that you developed for the sample project and compare it to the actual project budget.

Make the comparison with these factors in mind.

1. How close were you on the totals?
2. Within each line item, did you agree on the **types** of things to be budgeted?
3. Within each line item, did you agree with the **amounts to be spent** for each of the activities?
4. List your major disagreements in terms of **types** and **costs** for given activities.

GROUP ACTIVITY

Review a proposal and its budget to ascertain or question each expenditure.

Note: The following outline is to be used by the workshop facilitator.

Facilitator's Outline	Notes
A. Activity	
1. Break the large group into smaller groups of 3 to 5 people each. Give each person a copy of the sample proposal and its budget.	You will need a sample proposal and budget. By having alternative budget pages, you can introduce "fat" vs. "lean" budgets depending upon the group.
2. Give each person about 15 to 20 minutes to look through the proposal/budget and make notes.	
3. Have each small group now work together and develop a "composite position" on their review of the budget.	Also, if you have a final budget that was actually negotiated, this would be good information for the group to see.

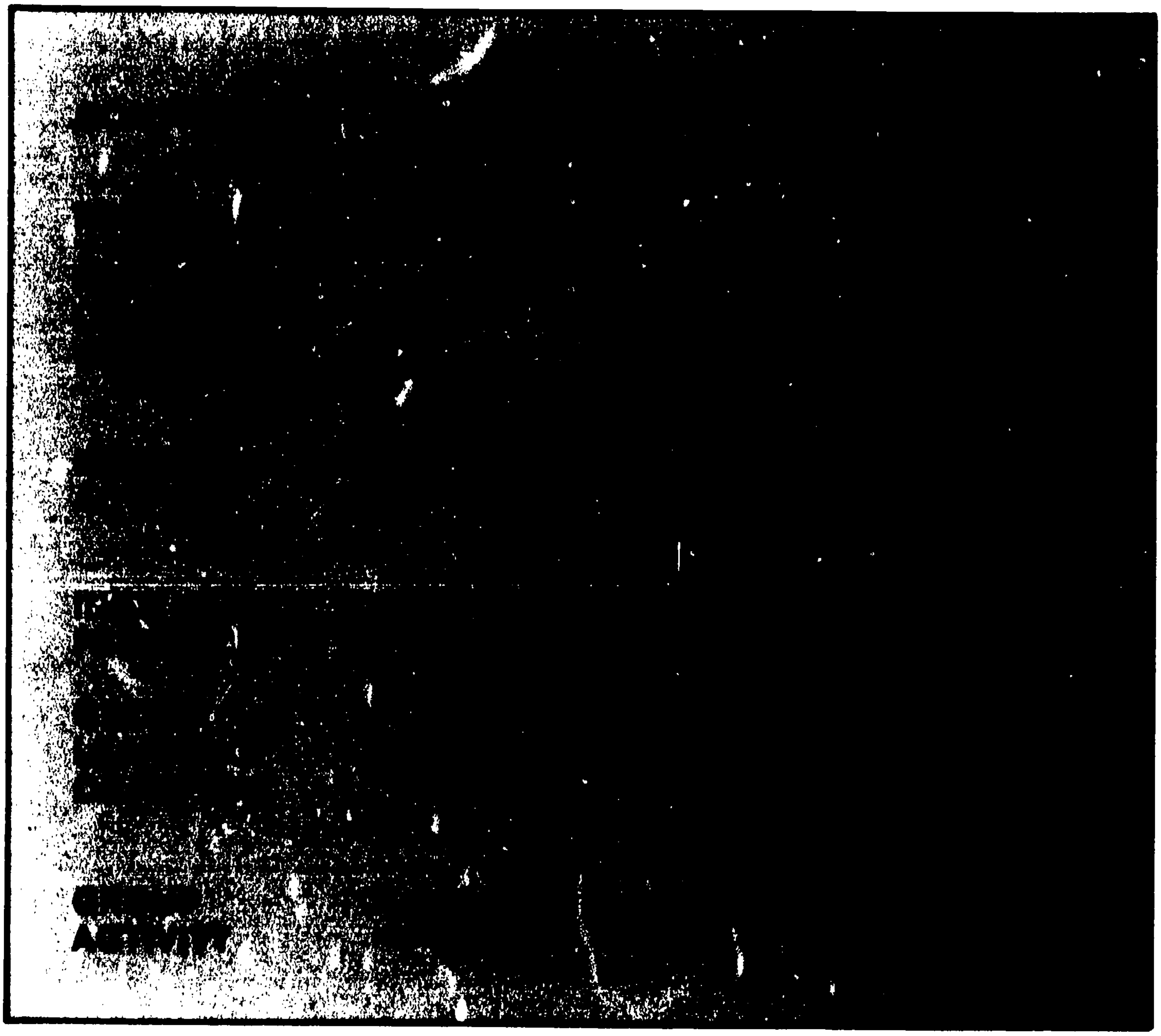
Facilitator's Outline	Notes
B. Feedback 1. Have each group report its analysis of the budget. 2. Evoke discussion to highlight areas of similarity and difference. Also, were there any areas that all groups overlooked? 3. Pass out an actual budget that was funded so they can see the final result. Would they have been as stingy/generous in making the funding award.	

NOTES

Learning Experience 6

Drafting a Full Proposal

OVERVIEW



[illegible] Activity

Draft a proposal for a project you have in mind.

The development of a final proposal for funding is often a long process. It must be preceded by good detective work and the development of a summary outline, including an estimated budget.

Take an idea that you have for a career guidance project and develop a first draft of a complete proposal. Refer closely to the reading for Competency 6 on page 22 to be sure that you have developed narrative for all the major areas of the proposal and that you have covered the required content under each area.

INDIVIDUAL FEEDBACK

Have colleagues critique your draft proposal and suggest improvements.

Make two or three copies of your draft proposal and circulate it to colleagues or other professionals outside your organization. Tell them you plan to propose this project and are interested in frank feedback on the idea and your specific approach to the project.

Be prepared to swallow your "pride of authorship" and be open to suggestions.

GROUP ACTIVITY

Review a draft of a career guidance proposal and suggest improvements.

Note: The following outline is to be used by the workshop facilitator.

Facilitator's Outline	Notes
A. Introduction 1. Indicate that by reviewing the first draft of a proposal, the group can see the roughness of a first attempt and can suggest substantial improvements. 2. Break the large group into smaller groups of 3 to 5 people each. 3. Have each group complete the Individual Activity or provide them with draft proposals. B. Activity 1. Have groups exchange draft proposals. 2. Have each small group work together to suggest change and improvement in each section of the draft. Have them organize their notes section by section.	

Facilitator's Outline	Notes
C. Feedback 1. Have each group report the improvements they would make in each section of each proposal. 2. Record these changes on a wall chart. 3. Pose the question and discuss the resulting "fundability" of the proposals if the suggested modifications were made.	

PARTICIPANT SELF-ASSESSMENT QUESTIONNAIRE

1 Name (Optional) ______________________ 3. Date ______________________

2 Position Title ______________________ 4 Module Number ______________________

Agency Setting (Circle the appropriate number)

6 Elementary School
7 Secondary School
8 Postsecondary School
9 College/University
10 JTPA
11 Veterans
12 Church
13. Corrections
14. Youth Services.
15 Business/Industry Management
16. Business/Industry Labor.
17 Parent Group.
18. Municipal Office.
19. Service Organization.
20. State Government.
21. Other.

Workshop Topics	PREWORKSHOP NEED FOR TRAINING *Degree of Need* (circle one for each workshop topic).					POSTWORKSHOP MASTERY OF TOPICS *Degree of Mastery* (circle one for each workshop topic).				
	None	Slight	Some	Much	Very Much	Not Taught	Little	Some	Good	Outstanding
1. Knowing which resource documents you need to identify potential funding sources.	0	1	2	3	4	0	1	2	3	4
2. Identifying public and private sources of support for grants.	0	1	2	3	4	0	1	2	3	4
3. Developing problem statements or need statements for proposals.	0	1	2	3	4	0	1	2	3	4
4. Defining strategies for documenting a problem or need.	0	1	2	3	4	0	1	2	3	4
5. Narrowing potential funding sources to a few good prospects.	0	1	2	3	4	0	1	2	3	4
6. Discussing proposal ideas with prospective funding agencies.	0	1	2	3	4	0	1	2	3	4
7. Developing a summary outline for a career guidance proposal.	0	1	2	3	4	0	1	2	3	4
8. Identifying key benefits, and alternative approaches for given projects.	0	1	2	3	4	0	1	2	3	4
9. Drafting a proposal budget.	0	1	2	3	4	0	1	2	3	4
10. Critiquing and improving a sample proposal budget.	0	1	2	3	4	0	1	2	3	4
11. Completing a rough draft of a proposal.	0	1	2	3	4	0	1	2	3	4
12. Reviewing a draft proposal and suggesting ways to strengthen it.	0	1	2	3	4	0	1	2	3	4

	None	Slight	Some	Much	Very Much	Not Taught	Little	Some	Good	Outstanding
Overall Assessment on Topic of Write Proposals	0	1	2	3	4	0	1	2	3	4

Comments:

Trainer's Assessment Questionnaire

Trainer: ____________ Date: ____________ Module Number: ____________

Title of Module: ____________

Training Time to Complete Workshop: ____________ hrs. ____________ min.

Participant Characteristics

Number in Group ________ Number of Males ________ Number of Females ________

Distribution by Position

________	Elementary School	________	Youth Services
________	Secondary School	________	Business/Industry Management
________	Postsecondary School	________	Business/Industry Labor
________	College/University	________	Parent Group
________	JTPA	________	Municipal Office
________	Veterans	________	Service Organization
________	Church	________	State Government
________	Corrections	________	Other

PART I

WORKSHOP CHARACTERISTICS—Instructions: Please provide any comments on the methods and materials used, both those contained in the module and others that are not listed. Also provide any comments concerning your overall reaction to the materials, learners' participation or any other positive or negative factors that could have affected the achievement of the module's purpose.

1. *Methods:* (Compare to those suggested in Facilitator's Outline)

2. *Materials:* (Compare to those suggested in Facilitator's Outline)

3. *Reaction:* (Participant reaction to content and activities)

PART II

WORKSHOP IMPACT—Instructions: Use Performance Indicators to judge degree of mastery. (Complete responses for all activities. Those that you did not teach would receive 0.)

	Group's Degree of Mastery				
	Not Taught	**Little (25% or less)**	**Some (26%-50%)**	**Good (51%-75%)**	**Outstanding (over 75%)**
	Note: Circle the number that best reflects your opinion of group mastery.				
Learning Experience 1					
Group	0	1	2	3	4
Individual	0	1	2	3	4
Learning Experience 2					
Group	0	1	2	3	4
Individual	0	1	2	3	4
Learning Experience 3					
Group	0	1	2	3	4
Individual	0	1	2	3	4
Learning Experience 4					
Group	0	1	2	3	4
Individual	0	1	2	3	4
Learning Experience 5					
Group	0	1	2	3	4
Individual	0	1	2	3	4
Learning Experience 6					
Group	0	1	2	3	4
Individual	0	1	2	3	4

Code:

Little: With no concern for time or circumstances within training setting if it appears that less than 25% of the learners achieved what was intended to be achieved

Some: With no concern for time or circumstances within the training setting if it appears that less than close to half of the learners achieved the learning experience.

Good: With no concern for time or circumstances within the training setting if it appears that 50%-75% have achieved as expected

Outstanding: If more than 75% of learners mastered the content as expected.

PART III

SUMMARY DATA SHEET—Instructions: In order to gain an overall idea as to mastery impact achieved across the Learning Experiences taught, complete the following tabulation. Transfer the number for the degree of mastery on each Learning Experience (i.e., group and individual) from the Workshop Impact form to the columns below. Add the subtotals to obtain your total module score.

GROUP

Learning Experience

1 = score (1-4) __________

2 = score (1-4) __________

3 = score (1-4) __________

4 = score (1-4) __________

5 = score (1-4) __________

6 = score (1-4) __________

Total (add up) __________

INDIVIDUAL

Learning Experience

1 = score (1-4) __________

2 = score (1-4) __________

3 = score (1-4) __________

4 = score (1-4) __________

5 = score (1-4) __________

6 = score (1-4) __________

Total (add up) __________

Total of the GROUP learning experience scores and INDIVIDUAL learning experience scores = __________. Actual Total Score __________ Compared to Maximum Total* __________.

*Maximum total is the number of learning experiences taught times four (4).

Performance Indicators

As you conduct the workshop component of this training module, the facilitator's outline will suggest individual or group activities that require written or oral responses. The following list of **performance indicators** will assist you in assessing the quality of the participants' work:

Module Title: *Write Proposals*

Module Number: CG B-2

Group Learning Activity	Performance Indicators to Be Used for Learner Assessment
Group Activity Number 1: Work with resource materials to identify potential sources of support.	1. Has the group identified **at least four** (4) potential sources of funding? 2. Did the group narrow the potential to **one** or **two** and could they justify the reduction? Use criteria such as-- • type of agency, • geographic area served, and • population to be served
Group Activity Number 2: Document and substantiate a problem statement.	1. Did the group identify the following points? • Workable program development team • The client group • Specify the problem they face • Document the problems using data, experience or authority figures • Justify the need to address the problem
Group Activity Number 3: Role play an initial contract with a potential funding source or foundation.	1. Group should be able to list questions to ask in this initial contract, such as-- • eligibility, • level of funding, • are certain activities not permitted, • what must be done, • chances for funding, • deadlines, and • proposal guidelines 2. Ask them to rate their confidence in contracting an agency.

Group Learning Activity	Performance Indicators to Be Used for Learner Assessment
Group Activity Number 4 Brainstorm items which might be highlighted in a summary outline in the areas of problem definition, budget, and approach.	1. Look for ideas such as the following in each area. A. **Problem Definition** • client group • specific problem • document the problem • other similar effects B. **Likely Budgets** • individual • institution • society C. **Approach** • justify certain activities because of past services to self or others • justify because of cost • justify because of time
Group Activity Number 5: Review a proposal and its budget to ascertain and/or question each expenditure	1. Budget review should include-- • figures calculated and added correctly; • each budget category specified (personnel, fringe benefits, travel, supplies, equipment, contractual, other, indirect costs, total costs); • budget expenditures related to project activities; and • questions related to project objectives and activities.
Group Activity Number 6: Review a draft of a career guidance proposal and suggest improvements	1. General ideas on proposal improvement. • Correction of spelling and grammar • Editing for good reading and logic • Be sure that facts and figures are correct • Need is documented • Objectives flow from need • Approach is logical and feasible • Budget is related to project activities

NOTES

REFERENCES

American Personnel and Guidance Association. "Information Aids for Proposal Writing and Possible Funding" appeared as Volume 4, no. 10 of the *INFORM* newsletter for the National Career Information Center, Washington, DC, May 1976.

Axelrod, Valija. "Grantsmanship and Proposal Development" in *Solving the Guidance Legislative Puzzle*. American Vocational Association and American Personnel and Guidance Association, Washington, DC, May 1976.

Axelrod, Valija; Drier, Harry; Kimmel, Karen; Sechler, Judith. *Career Resource Centers*. The National Center for Research in Vocational Education, Columbus, OH, 1977.

Drier, H. N., and Herr, E. L., eds. *Solving the Guidance Legislative Puzzle*. American Vocational Association and American Personnel and Guidance Association, Washington, DC, March 1978.

Hull, William L., and Wells, R. L. *The Classification and Evaluation of Innovations in Vocational and Technical Education*. Research Series No. 71. The Center for Vocational Education, Columbus, OH, 1973.

Hull William. "Innovations Evaluation Guide - IEG." The Center for Vocational Education, Columbus, OH, 1973.

ADDITIONAL RESOURCES

Career Education: A Handbook of Funding Resources by Charles W. Ryan. Houghton Mifflin Co., Boston, Massachusetts, 1973. 65 pp.

Addressed primarily to K-12 educators, this handbook gives a profile of career education and its infusion at the elementary and high school levels. It describes and suggests local, state, federal, and foundation funding sources. It outlines techniques for proposal preparation and provides the following appendices: Career Education Terminology; State Research Personnel; Developing the Research Proposal; Developing the Abstract; Activities Sequence for Education Project; Proposal Rating Criteria; Guide to Federal Resources for Career Education; Foundation Grants to Education. Sample of a Funded Research Proposal; and the 1972 Education Amendments.

How to Write Successful Foundation Presentations by Joseph Dermer. 1972. Public Services Materials Center, 104 East 40th Street, New York, New York 10016. $6.95

This book provides step-by-step instructions in writing foundation presentations and examples of grant-winning proposals. Subjects include writing appointment letters and preparing presentations for general operating funds, special projects, and capital funds.

Sources of Information on Proposal Writing and Possible Funding. 1975. U.S. Department of Labor, Employment Standards Administration, Women's Bureau, Washington, D.C. 20210.

Although published in January, 1975, this 14-page booklet lists valuable resources and materials which should be helpful to persons seeking funds for projects. The sources of information are divided into three major categories. (1) bibliography on proposal writing and obtaining grants; (2) private foundation grants and references; and (3) federal grants and sources of information. Listings are annotated and include prices. Most can be found in public or university libraries. The booklet also includes a listing of foundation center libraries. The booklet also includes a listing of foundation center libraries (regional collections are listed by state).

NOTES

KEY PROJECT STAFF

The Competency-Based Career Guidance Module Series was developed by a consortium of agencies. The following list represents key staff in each agency that worked on the project over a five-year period.

The National Center for Research in Vocational Education

Harry N. Drier .... Consortium Director
Robert E. Campbell .... Project Director
Linda A. Pfister .... Former Project Director
Robert Bhaerman .... Research Specialist
Karen Kimmel Boyle .... Program Associate
Fred Williams .... Program Associate

American Institutes for Research

G. Brian Jones .... Project Director
Linda Phillips-Jones .... Associate Project Director
Jack Hamilton .... Associate Project Director

University of Missouri-Columbia

Norman C. Gysbers .... Project Director

American Association for Counseling and Development

Jane Howard Jasper .... Former Project Director

American Vocational Association

Wayne LeRoy .... Former Project Director
Roni Posner .... Former Project Director

U.S. Department of Education, Office of Adult and Vocational Education

David Pritchard .... Project Officer
Holli Condon .... Project Officer

A number of national leaders representing a variety of agencies and organizations added their expertise to the project as members of national panels of experts. These leaders were--

Ms Grace Basinger
Past President
National Parent-Teacher Association

Dr Frank Bowe
Former Executive Director

Ms Jane Razeghi
Education Coordinator
American Coalition of Citizens with Disabilities

Mr Robert L Craig
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Dr Walter Davis
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AFL-CIO

Dr Richard DiEugenio
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House Education and Labor Committee

Mr Oscar Gjernes
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CATEGORY A: GUIDANCE PROGRAM PLANNING
- A-1 Identify and Plan for Guidance Program Change
- A-2 Organize Guidance Program Development Team
- A-3 Collaborate with the Community
- A-4 Establish a Career Development Theory
- A-5 Build a Guidance Program Planning Model
- A-6 Determine Client and Environmental Needs

CATEGORY B: SUPPORTING
- B-1 Influence Legislation
- B-2 Write Proposals
- B-3 Improve Public Relations and Community Involvement
- B-4 Conduct Staff Development Activities
- B-5 Use and Comply with Administrative Mechanisms

CATEGORY C: IMPLEMENTING
- C-1 Counsel Individuals and Groups
- C-2 Tutor Clients
- C-3 Conduct Computerized Guidance
- C-4 Infuse Curriculum-Based Guidance
- C-5 Coordinate Career Resource Centers
- C-6 Promote Home-Based Guidance
- C-7 Develop a Work Experience Program
- C-8 Provide for Employability Skill Development
- C-9 Provide for the Basic Skills
- C-10 Conduct Placement and Referral Activities
- C-11 Facilitate Follow-through and Follow-up
- C-12 Create and Use an Individual Career Development Plan
- C-13 Provide Career Guidance to Girls and Women
- C-14 Enhance Understanding of Individuals with Disabilities
- C-15 Help Ethnic Minorities with Career Guidance
- C-16 Meet Initial Guidance Needs of Older Adults
- C-17 Promote Equity and Client Advocacy
- C-18 Assist Clients with Equity Rights and Responsibilities
- C-19 Develop Ethical and Legal Standards

CATEGORY D: OPERATING
- D-1 Ensure Program Operations
- D-2 Aid Professional Growth

CATEGORY E: EVALUATING
- E-1 Evaluate Guidance Activities
- E-2 Communicate and Use Evaluation-Based Decisions

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