

Facilitator Notes

# Writing Proposals and Following Up: Other Aspects

These notes accompany the PowerPoint presentation of the same title by Barbara Gastel.

This module normally would accompany other modules on preparing a grant proposal.

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| Module Title | Writing Proposals and Following Up: Other Aspects |
| Course title (or analogous information) | This module can serve as part of a workshop on preparing grant proposals. It also can serve as part of a workshop unit, course unit, or short course on the topic. It is one of nine modules on preparing grant proposals. Typically, most or all of the nine should be used, in the order (or approximately the order) in which they are numbered. |
| Unit Title | Preparing Grant Proposals |
| No. of Unit | Not applicable |
| Session Day/Time | Not applicable |
| Length of Session | This module could run anywhere from about 45 minutes to about 2 hours, depending largely on how many of the wrap-up exercises at the end are done. The length also would depend in part on how much the facilitator elaborates on points in the slides and how much discussion there is. If the session will run much more than about 1 hour, a break probably should be included. |
| Aim | This module is intended mainly to help participants (1) know the basics of revising and resubmitting proposals, (2) know the basics of preparing progress reports on funded projects, (3) be aware of additional resources on preparing grant proposals, and (4) review, integrate, and retain material from this series of sessions. |
| Learning Outcomes | By the end of this module, participants will be able to (1) summarize a suitable approach to revising and resubmitting a proposal, (2) state basic guidelines for preparing progress reports on funded projects, (3) identify additional resources on preparing grant proposals, and (4) recall key messages from this series of sessions. |
| Facilitator Profile | This module would ideally be facilitated by someone with experience in writing, editing, or reviewing grant proposals. A less experienced facilitator also can present the module, as the combination of PowerPoint slides and facilitator notes provides sufficient information to do so. |
| Participant Profile | This module is primarily for early-career researchers with little or no experience preparing grant proposals. However, it also may aid mid-career researchers who wish to improve their preparation of grant proposals or their mentoring of others in this regard. In addition, it may be helpful to some editors and writing instructors. Participants having experience with grant proposals may be able to enrich the workshop by sharing their experience. |
| Pre-workshop Activities | No pre-workshop activities are required. However, participants are encouraged to review the previous sessions in this series before attending this one. |
| Room Layout | Ideally, this module will be presented in a room layout facilitating interaction—for example, with several small tables, with tables in a U configuration, or with a conference table. However, this module also can be presented in a traditional classroom or a lecture hall. |
| Number of Participants | For optimum discussion, the number of participants should be limited to about 10–15. However, the module also can reasonably delivered to about 25 participants. |
| Files and Materials | PowerPoint file: 09\_Writing a Proposal and Following Up – Additional Aspects |
| Visual Aids and Resources | Computer with PowerPoint; projector for PowerPoint presentation  If feasible, internet access  If feasible, some examples of progress reports  Depending on which exercises are chosen and what approach is taken for them, perhaps such items as flip charts, markers, and participants’ laptop computers  If relevant, evaluation forms  If relevant, certificates of completion |
| Potential Embellishments of the PowerPoint | To keep the file small, the presentation consists almost solely of text. Images can be added to make it more visually appealing. For example, decorative images can be inserted between sections to signal a change of subtopic and provide visual relief. Also, relevant images can be added to selected slides if desired.  If desired, the facilitator can divide the material on a given slide into more than one slide or can format some slides for progressive disclosure, in which items on a slide are revealed one by one.  As this session is the last in the series, perhaps include one or more slides in this regard. For example, if a group photo was taken at a previous session, include it and distribute it to the participants. Likewise, if candid photos were taken of the participants working in small groups, perhaps include some. |
| Learning methods and activities | The following notes may help facilitators to (1) elaborate on the content of some slides and (2) elicit group participation at suitable times. (Slide 1 is a title slide.)   * Slide 2 (“Overview”)   + Note the topics that the module will address.   + Note the module’s overall aim, which is stated earlier in this facilitator’s guide. (Feel free, of course, to frame it in the way that the group is likely to find most relevant.) * Slide 3 (“Revising and Resubmitting Proposals”)   + (This slide is just a “divider slide” providing transition to the next section.) * Slide 4 (“Revising and Resubmitting a Proposal”)   + Perhaps ask participants whether they have experience revising and resubmitting proposals. If they have such experience, include opportunity for them to share it during discussion of points on this slide.   + If you have experience revising and submitting proposals, or if you know of colleagues’ experience in this regard, integrate items from the experience as appropriate.   + Perhaps note that the feedback from the reviewers can help not only in revising the current proposal but also in writing better proposals in the future. * Slide 5 (“Following Up: Preparing Progress Reports”)   + (This slide is just a “divider slide” providing transition to the next section.) * Slide 6 (“Progress Reports: Some Functions”)   + Note that if a grant is received, the funder generally will require periodic progress reports on the work.   + Emphasize that in addition to informing the funder, progress reports can be useful to the grant recipient.   + Perhaps ask participants whether they have experience preparing progress reports. If they have such experience, include opportunity for them to share it during discussion of points on this slide and the following slides.   + If you have experience preparing progress reports, or if you know of colleagues’ experience in this regard, integrate items from the experience as appropriate when discussing points on this slides and the slides that follow. * Slide 7 (“Preparing to Write a Progress Report”)   + Re bulleted item 2: Perhaps note that colleagues or program officers may be able to provide sample progress reports.   + Re bulleted item 3: Note that reviewing the proposal or project plan prepares one to show how the work done compares with the work expected. * Slide 8 (“Progress Reports: A Common Structure”)   + Summarize the structure noted on the slide. If you know of other structures for progress reports, feel free to describe them.   + If feasible, show one or more progress reports or have participants do so.   + Perhaps include a brief exercise in which small groups of participants look at a progress report and make observations about its structure and in other regards. * Slide 9 (“Writing a Progress Report”)   + Present the points on this slide.   + Regarding bulleted item 1: Note that organizing the progress report like the project plan (for example, with sections on the same parts of the work) helps make the report easy for readers to follow. * Slide 10 (“Writing a Progress Report (cont)”)   + Re bulleted item 2: Note that in the long run, it is better to discuss problems encountered in funded work than to hide them.   + Re bulleted item 3: Note that putting each progress report on a project in the same format makes things easier for both the writer and the reader. Remind participants to be sure to make all needed updates when using a template or modifying one progress report to yield the next.   + Re bulleted item 4: Also remind participants to proofread their progress reports. * Slide 11 (“Additional Resources”)   + (This slide is just a “divider slide” providing transition to the next section.) * Slide 12 (“Some Resources”)   + This slide lists some sources of additional guidance on preparing grant proposals. Feel free to list additional resources, either on this slide or subsequently. Also provide opportunity for participants to suggest additional resources.   + If internet access is available and time permits, perhaps follow the links and show the listed resources. Of course, also feel free to show other relevant resources.   + If internet access will not (or might not) be available, considering adding slides containing screen shots from resources. * Slide 13 (“Looking Ahead”)   + (This slide is just a “divider slide” providing transition to the next section.) * Slide 14 (“Looking Ahead”)   + Re bulleted item 1: Too often, participants attend training sessions but do not go on to apply the content. This point and the wrap-up exercises are intended to help ensure that participants do use what they learned.   Re bulleted item 2: Encourage participants to share what they learned in this workshop. Note that in addition to helping others, sharing what one learned helps reinforce one’s own knowledge. .   * Slide 15 (“Wrap-Up Exercises”)   + (This slide is just a “divider slide” providing transition to the next section.)   + Three exercises follow. Depending on the amount of time available, the backgrounds of the participants, and other factors, the facilitator may choose one or two of the exercises or have the group do all three. If not all three exercises will be done, the next part of the PowerPoint presentation should be modified accordingly. * Slide 16 (“Exercise 1: Looking Ahead”)   + This exercise follows directly from Slide 14 (“Looking Ahead”).   + Consider having participants do this exercise in groups of about three or four and then telling the full group some items they came up with.   + With regard to the second bulleted item, the full group could develop a master list combining ideas from the small groups. * Slide 17 (“Exercise 2: Identifying Key Points”)   + Consider having groups of about four or five participants do this exercise. To increase exchange of ideas, perhaps have different people work together on this exercise than on the previous exercise.   + A possible approach is to have each group write its “master list” on a large sheet of paper (for example, on a flip chart) and then to have people circulate, read the various lists, and perhaps write comments on them. * (Note: If this session will include a break, now might be a good time to have it.) * Slide 18 (“Exercise 3: Proposing a 1-Day Workshop”)   + This exercise is intended largely to help participants practice starting to develop a persuasive, robust proposal. It also is intended to help participants review the content of the training. The specific task may be modified as deemed appropriate. For example, participants might have the option of developing a proposal for a lecture series, online course, or book on the topic instead of a workshop.   + In general, this exercise would best be done by groups of about four or five participants.   + In giving the instructions, it might be useful to remind participants to include the “5 Ws and an H” (who, what, where, when, why, and how), which were presented in an earlier session   + Perhaps have each group share its proposal as a brief PowerPoint presentation and have the members of another group serve as the main ones posing questions to the group and commenting on the proposal.   + Depending in part on the number of participants, about an hour probably should be allocated for this exercise. * Slide 19 (“In Conclusion”)   + Provide opportunity to ask remaining questions.   + If relevant, distribute (and have participants complete) evaluation forms for the training or say that participants will receive such forms electronically. Note that such feedback can be very helpful in refining the training.   + If relevant, distribute certificates of completion or say how such certificates will be provided. * Slide 20 (“Wishing you much success!”)   + Thank the participants for taking part in the sessions.   + Say you hope the sessions have been helpful.   + Wish the participants great success.   + If appropriate, encourage participants to inform you if they have grant proposals accepted. * Slide 21 (Creative Commons information etc):   + (This is the standard closing slide for this series of presentations.) |