

BCCDA-CERIC Webinar Series

Strengthening the Skills of Career Development Leaders

Part 2: Policy, Proposal Writing & Program Design

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Webinar Series

Part 1: Leadership 101

Part 2: Policy, Proposal Writing & Program Design

Part 3: Leading People and Partnerships

Part 4: Operational Logistics, Fiscal Management, and Evaluation

Webinar Agenda

Setting the
Scene

Leadership
Competencies

Policy

Proposal
Writing

Program
Design

Good Morning, from the
Big Island of Hawaii!



Introductions



Roberta Neault, PhD, CCC, CCDP, GCDFi



Deirdre Pickerell, PhD, CHRP, GCDF-I

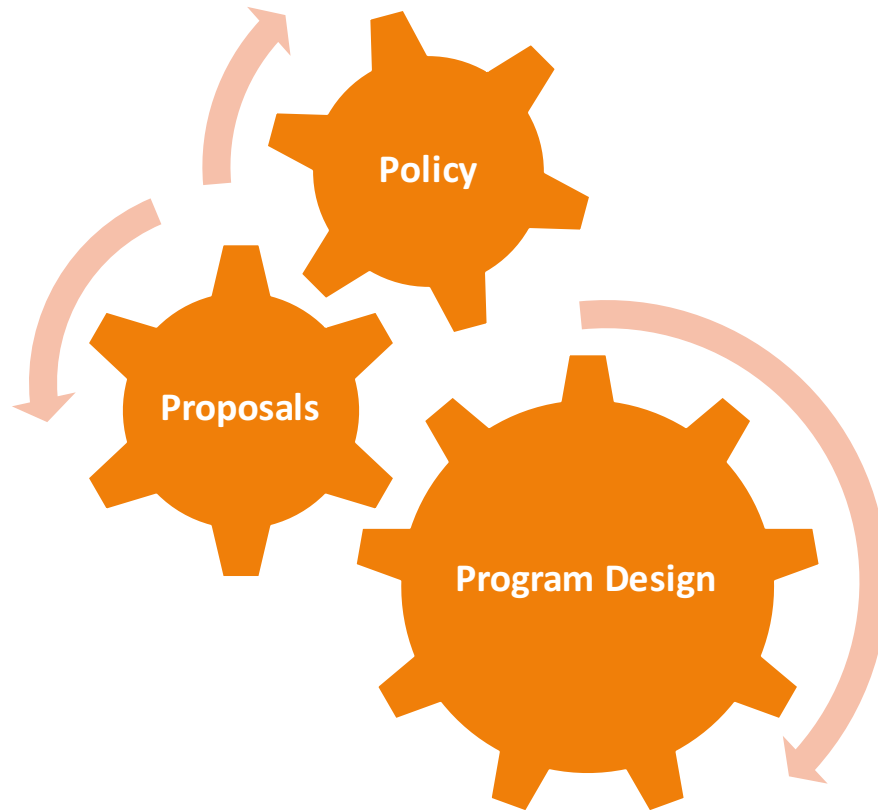


Tannis Goddard, MA

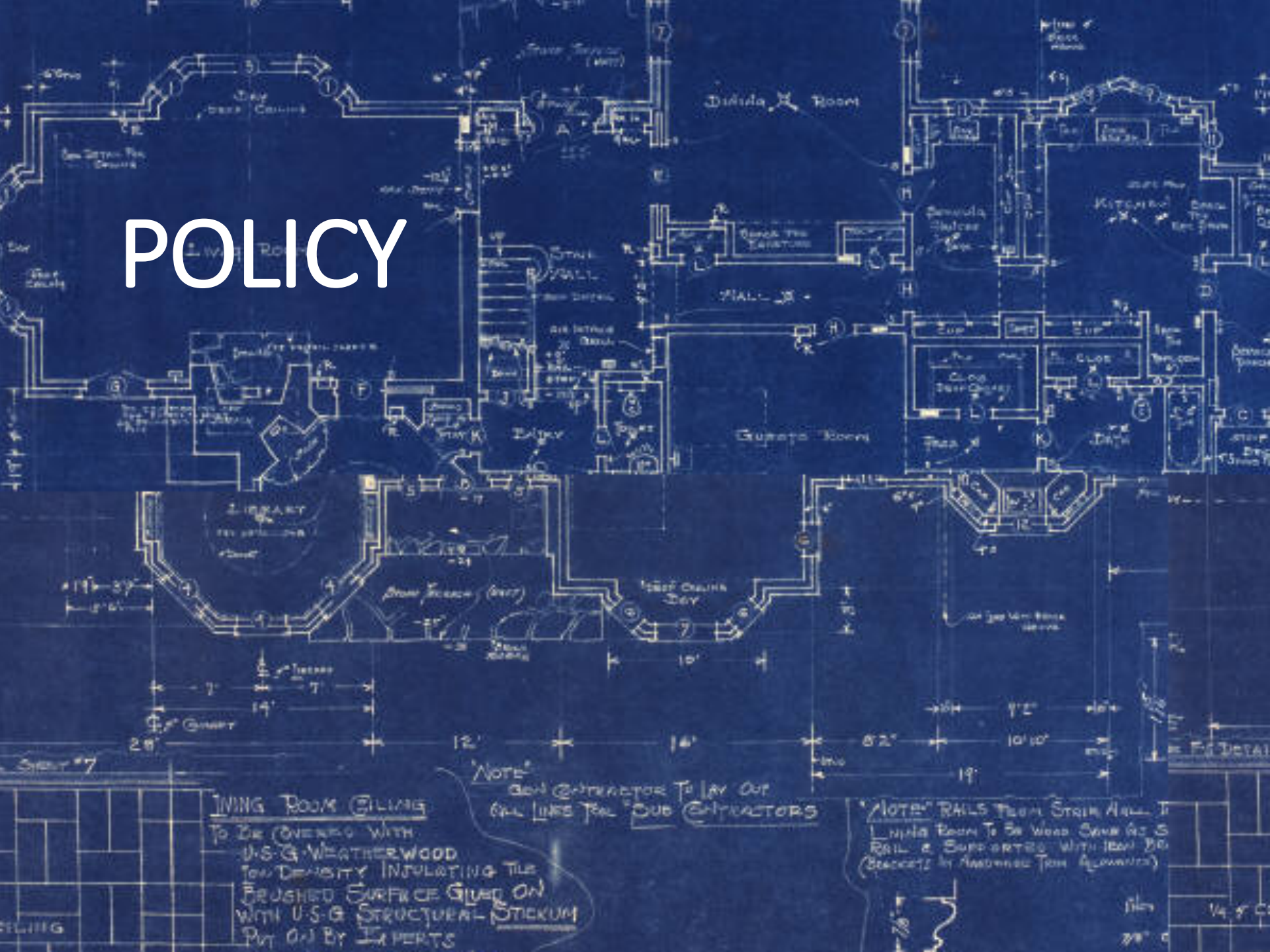


Tom Burnell, MA

The 3 P's & Leadership Competencies



POLICY



LIVING ROOM CEILING
TO BE COVERED WITH
U.S.G. WEATHERWOOD
LOW DENSITY INSULATING TILE
BRUSHED SURFACE GLEED ON
WITH U.S.G. STRUCTURAL STICKUM
PUT ON BY EXPERTS

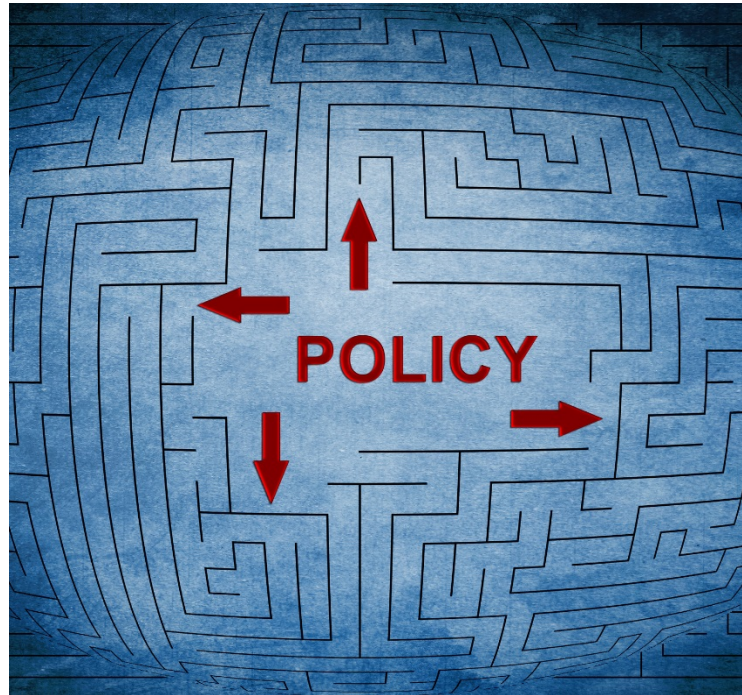
NOTE
GEN CONTRACTOR TO LAY OUT
GAL LINES FOR SUB CONTRACTORS

NOTE
RAILS FROM STAIR HALL TO
LIVING ROOM TO BE WOOD SAVE AS IS
RAIL & SUPPORTS WITH LEAD PC
(BRACKET IN ASSIGNED JOINT ALLOWANCE)

Poll

Select the word that most closely aligns with your understanding & definition of policy?

- Strategy
- Principle
- Rule



Policy Synonyms

Strategy

Principle

Rule



Public Policy

Program Policy

Organizational Policy

Understand, Interpret and Apply

Set Strategy to Work with
Policies

Guide Staff to Reconcile Policies
with Inspiring Service / Practice

Influence Policy Development



**Leadership
Roles**

Panelist Perspectives



**Roberta
Neault**



**Deirdre
Pickerell**



**Tannis
Goddard**



**Tom
Burnell**



PROPOSAL WRITING

6 SUCCESS
STEPS

1. Find & Respond to the Right Funder



“To Respond or Not to Respond to the RFP”...that is the KEY Question



KEY

Ask Yourself...

Does the project fit your core business strategy?

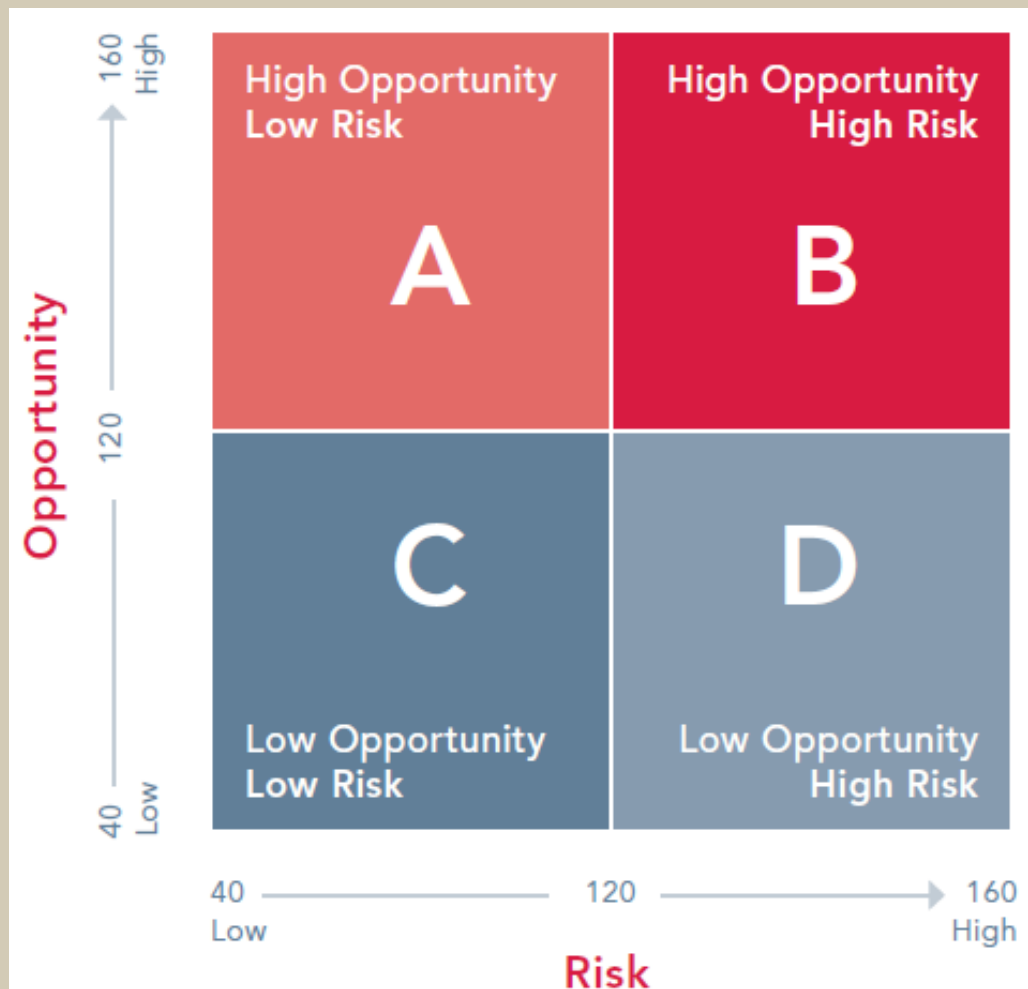
Are you ideally positioned to win?

Do you understand the stakeholders needs and expectations?

Can you deliver the contract?

Do you have the necessary corporate commitment and bid resources?

Source: <http://www.projectconnect.com.au/Documents/Tender%20Tips%20-%20BidWrite/Tender%20Tip%20-%20Bid%20-%20No%20Bid.pdf>



Opportunity/Risk Grid

Source:

http://www.ncmahq.org/files/Articles/DB13A_CM0407_F02.pdf

Analyzing RFPs

Who's the Funding Body and what do they need?

Do you agree with terms/conditions?

Can you meet the evaluation criteria?

What makes you unique?

What resources/strategies do you have to meet needs?

How does your proposal fits with funder's ongoing programs?

Ask yourself 'Who Cares?' before adding anything!

Source: NETWERCC Journal 18 (page 12- 14)

2. Build a Team



Context & Research

Coordinator/
Project Manager

Graphic Design

Historical, Organizational
Knowledge

Structuring the Response

Financial Modelling

Subject-Matter Expertise

Writing & Editing



3. Do the Math

Tips for Budgets

Be realistic

Avoid inflating your budget

Have someone else review your budget

Consider cash flow and project phases

Adhere to required budget categories, if applicable

Source: <http://www.learnerassociates.net/proposal/hints15.htm>



Budget Categories

- Personnel (salary and benefits)
- Consultants (salary)
- Instruction
- Equipment
- Supplies
- Communication (telephone/postage)
- Materials preparation
- Travel
- Rental/Lease of facilities
- Evaluation
- Other expenses
- Indirect costs

4. Be Clear, Concise, and Compelling



Approaching the RFP

Read/Re-Read
the RFP

- Understand context and requested details fully

Understand
Response Templates

- e.g., mandatory criteria and response formats

Develop a
Table of Contents

- Note key points to address under section headings

Organize
Writing/Review Plan

- Determine document layout ahead of time
- Identify who will maintain MASTER and how

Say What You
Intend To Deliver

- Include how you will deliver it and how you will evaluate and continuously improve

Allow Time
For Formatting

- e.g., page numbering and inserting appendixes



5. Leave Wiggle Room



Submitting On-Time

Plan for what you can

- Know in advance how, where, and when you need to submit
- Leave 24 hours for incidentals

Prepare for the unexpected

- Getting stuck in traffic en-route to the courier
- Delivering to the wrong address
- Ferries/flights being cancelled
- Printing mishaps

6. Follow-Up



Debrief Lessons Learned



What worked?

What didn't work?

What would you do differently?

Panelist Perspectives



**Roberta
Neault**



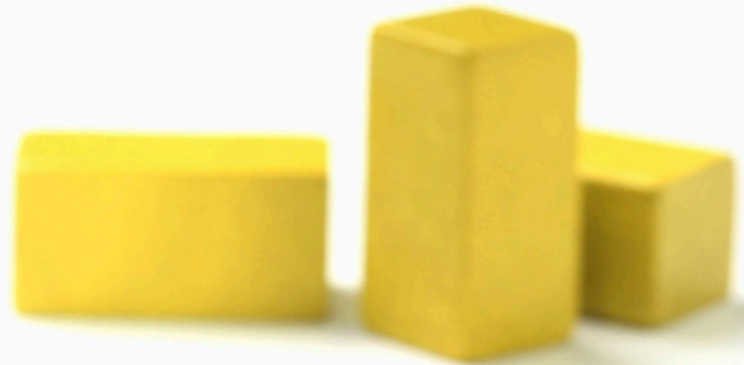
**Deirdre
Pickerell**



**Tannis
Goddard**

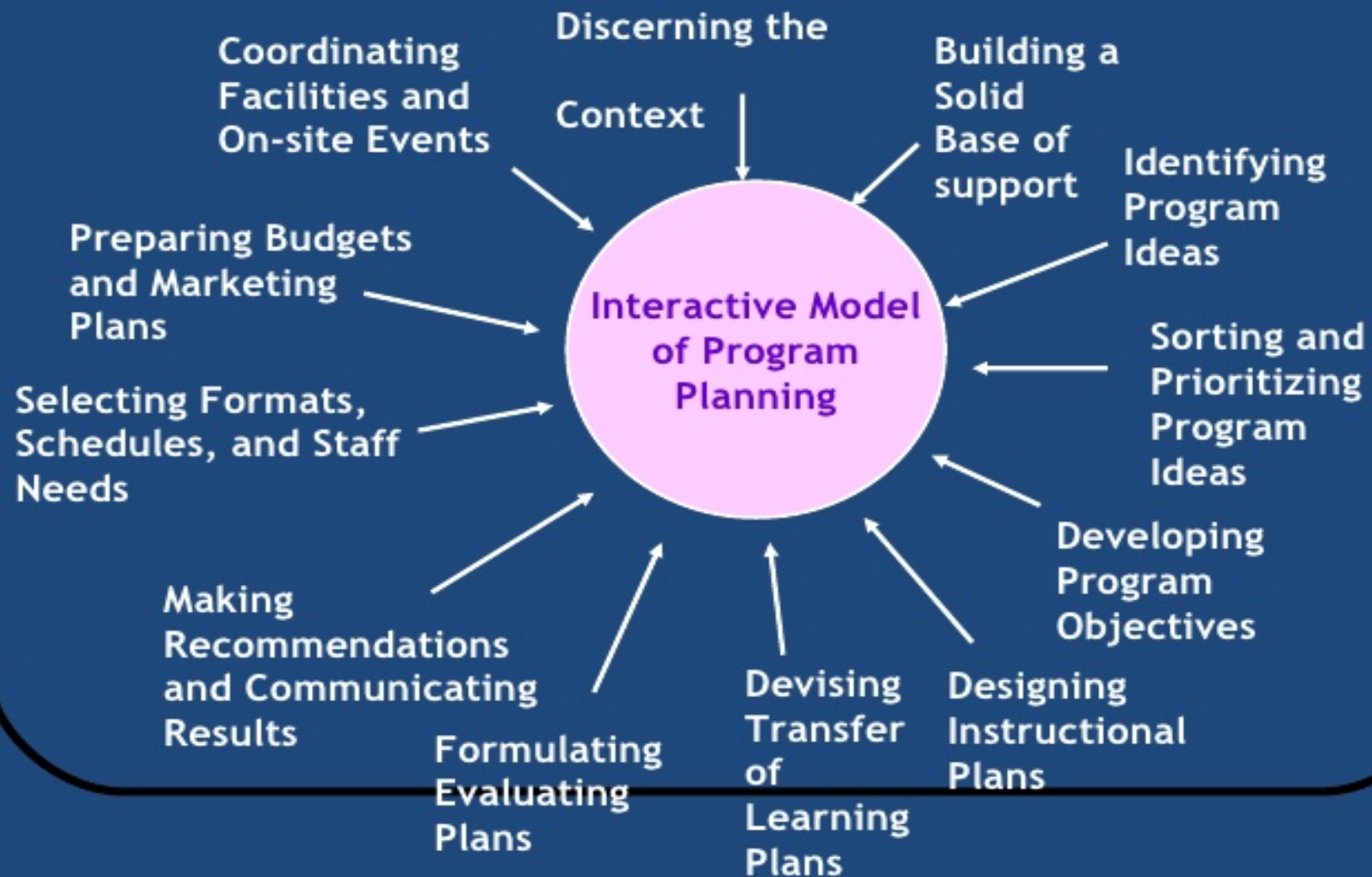


**Tom
Burnell**

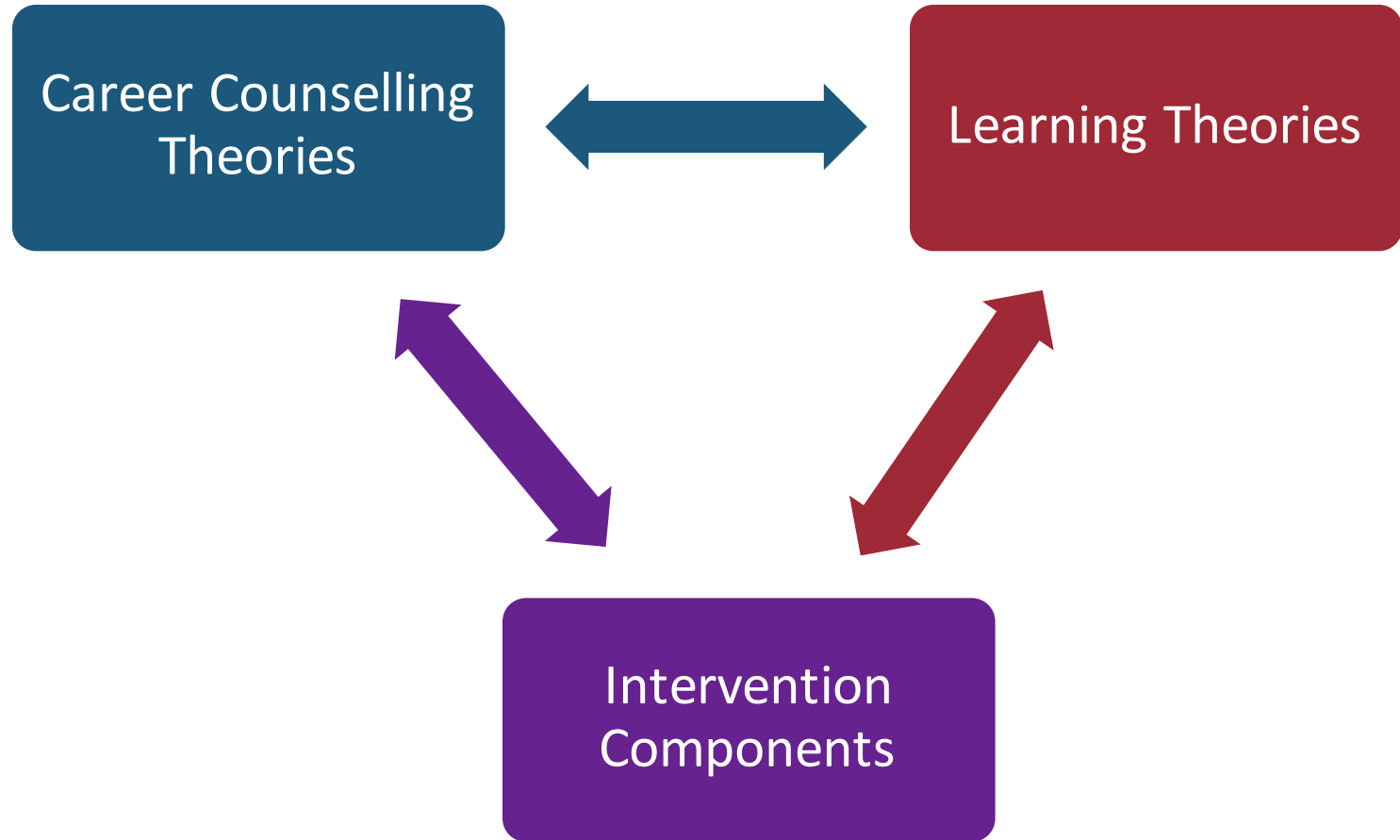


**PROGRAM
DESIGN**

Caffarella's Interactive Program Planning Model



Building Interventions



Counselling & Learning Dimensions

Learning / Counselling Dimensions	Learning & Development Experience
Learning Environment	<ul style="list-style-type: none">▪ The learning space – physical or technology enabled.▪ Efficacy of the space for the purpose and learner needs.▪ Comfort in the learning environment.
Content	<ul style="list-style-type: none">▪ Information being shared in the interventions. Selecting information that is relevant to Client's circumstance.▪ Selecting method of information delivery – including opportunities for learners to engage with the content.
Cognitive	<ul style="list-style-type: none">▪ Counselling strategies and activities that engage students in cognitive development (ie: becoming aware of factors that are impacting their career development situation).

Counselling & Learning Dimensions

Learning / Counselling Dimensions	Learning & Development Experience
Metacognitive	<ul style="list-style-type: none">Strategies and activities that engage students in metacognitive development (ie: reflective thinking, critical thinking, self-evaluation, critical judgement).
Social	<ul style="list-style-type: none">Strategies and activities that impact the nature of your relationship with Clients.
Affective	<ul style="list-style-type: none">Activities and responses that indicate a Client is feeling comfortable, happy, and satisfied in the experience.

Intervention Components

Workbooks & Written Exercises

Individualized Interpretation & Feedback

Self-Report Inventories

Values Clarification

Counsellor Support

Outside Reading

Personal Performance Accomplishments

Anxiety Reduction

Attention to Decreasing Barriers

Decision-Making Models & Strategies

Panelist Perspectives



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Conclusion

Strategic
Relationship
between the 3 P's

Leader's Role