Early Learning Hub Implementation Resources:

Governance & Leadership

Oregon Department of Education
Early Learning Division
2013

TABLE OF CONTENTS

Governance and Leadership 3
Instructions: Organizational Charter 5
Organizational Charter 6
Risk Analysis and Contingency Planning 8
Risk Analysis Matrix 13
ORID Focused Conversation Method 14
Focused Conversation Worksheet 17
Focused Conversation Sample Questions 18
Instructions: The Conversation Prep Chart 19
Conversation Prep Chart 20
Value in Conversation 21
Cycle of Value Diagnostic 22
Proposal Composition Guide 23
Toolkit: Building an Accountability Structure
Tool: Issues Management Form
Reference: Five Steps for Structuring Data-Informed Conversations and Action in Education

GOVERNANCE AND LEADERSHIP

Purpose of this chapter

Each Early Learning Hub has the flexibility to design its own governance and leadership structure – a key part of designing local solutions that best fit your community.

This chapter will support you in defining those structures and maximizing the impact you, community leaders and organizations within your network are able to achieve.

You may want to begin by becoming acquainted with all the tools and guides included in this chapter.

- Your **organizational charter** is the keystone and will serve as the foundation for much of your work. While most Hubs will have already defined their mission and values, you might find the charter document helpful in thinking about other elements of vision and direction (strengths, communities, etc.).
- The conversation facilitation tools can help you produce decisions that make your partners feel valued and engaged.
- Additional planning tools are included to help you manage risk, write proposals, track issues and build accountability. It will be helpful to reference your charter and the facilitation tools while using these other planning tools.

If you have other tools or techniques that work well for you, use them and feel free to share them with other Hubs.

Tools in this chapter

While the tools in this chapter are usable and valuable on their own, they will most effectively support your work if used together. In this chapter you'll find the following:

- **Organizational Charter**
  Your charter is critical in building a framework to drive your good work. It is the place where you document agreed-upon vision, overarching goals and objectives, and decisions about what you will and won't do to achieve those goals. Your charter defines your Hub's structure and mission, and it will be a reference, reminder and guide to focus your activities. This template is for those who don't already have a comprehensive charter document or want to consider additional elements of one.

- **Risk Analysis and Contingency Planning**
  Your work will encounter risks at some point, and your ability to respond to these risks will determine your effectiveness in delivering sustained and impactful programming. This tool will help you identify risks and prepare your Hub to manage them.

- **ORID Focused Conversation Facilitator (Instructions, Prep Chart and Sample Questions)**
  The ORID method of guiding conversation is rooted in the natural progression of thought, independent analysis and decision-making. It can help you direct a group through that process together so all participants begin and end on the same page. It helps to focus conversations on one priority issue and enables equal engagement while minimizing the risk of an emotionally driven discourse.

- **Having Effective Conversations (Prep Chart, Value Meter and Diagnostic Tool)**
  These tools can further help you facilitate good and productive conversations. They will prepare and train your partners to approach meetings in ways that are conducive to learning and continuous improvement. The tools encourage participants to empathize with others' perspectives and needs to engage cooperatively. These tools will be especially useful in combination with the **ORID Focused Conversation Facilitator**.

- **Five Steps for Data-Informed Conversations**
  A major goal for Hubs is to use data to inform strategic decision-making and ongoing improvement efforts. This guide provides the framework, tools and vocabulary needed to support data-informed conversations and action in education. It walks you through five key steps: setting the stage, examining the data, understanding the findings, developing an action plan, and monitoring progress and measuring success.

- **Grant Proposal Composition Tips**
  This document provides some helpful guidance on how to write competitive grant proposals. Even if you don't have a dedicated proposal writer on your team, you can still successfully respond to an RFA/RFP to continue your good work.

- **Issues Management Form**
  Your Hub will encounter the unexpected on a daily basis. These issues can range from minor snags that are easily addressed to more significant challenges that may take some time and coordination to solve. In either case a strong issues management approach will help you track your problem-solving efforts and apply what you learn to future challenges. This tool creates a structured way of tracking challenges and solutions.

- **Building an Accountability Structure Toolkit**
  An accountability structure is the framework that illustrates the different groups within your partnership and outlines the roles and responsibilities of each. Think of it as an organizational chart for your network.

INSTRUCTIONS: ORGANIZATIONAL CHARTER

Your Hub's charter is critical in building the framework that drives your good work. It will help you:

- Document agreed-upon vision, overarching goals and objectives, and what you will and won't do to achieve those goals
- Define your organization's structure and mission
- Create a reference, reminder and guide to focus your activities
- Focus on the very important role you and your Hub play in improving educational outcomes for all our children and their families

Who should be involved?

To create an effective charter, your entire core and partner leadership should be involved in its design. Each of your partners will bring a unique and valuable perspective to the design table.

Steps to designing a strong organizational charter:

1. Prioritize writing your charter during start-up.
2. Survey the entire form and make sure you and your partners understand what information is needed to complete it. This will help focus your discussion. As a Hub leader, you will already have clear responses to many of these sections, but also be open to your partners contributing elements you haven't considered.
3. Review the **Conversation Prep Chart** and **ORID Focused Conversation Facilitator Tools** in this package. They will help you facilitate productive and efficient conversations as you make decisions and document new ideas.
4. Encourage participants to candidly discuss their roles and strengths, and deliberately consider challenges.
5. Produce a document that is clear, uses simple and consistent language and flows well. Above all, your charter should be usable.
6. Conduct a thorough review with people who were not involved in the design. Observe its usability once completed. Is it equitable? Are your strategies aligning with it? Is your office culture promoting the values and principles outlined in it? If your charter has not been reviewed by the ELD, a representative should be involved at this stage.
7. Plan regular reviews and updates to your charter with your partners. Write these dates into action plans. Revisit your charter annually or as unforeseen changes occur.
8. Share your final charter widely with your community and share with other Hubs across the state. Be open to learning from one another to improve quality and outcomes.
9. Make your charter accessible to all partners, and consider posting it in your office.

ORGANIZATIONAL CHARTER

Hub Name:

Mission Statement and Goal
Why are we here, what are we hoping to achieve and how? What will our environment look like when we have achieved our goal? Use direct, jargon-free and motivational language.
Operating Principles and Core Values
What are our expectations for interacting within our Hub?
Scope and Boundaries
What is our Hub responsible for? What is outside our realm of responsibility?
Potential Obstacles
What are some of the challenges our Hub may encounter?

Assets
What are some of our Hub's most potent and accessible resources in achieving our objectives?
Roles, Responsibilities and Authority
Who participates and in what ways? Over what processes do we have authority? What are the limits of that authority?
Communication Plan
Summarize internal communication protocols, schedules and objectives. Reference your comprehensive communications strategy in the charter.
Participants in this Charter's Development
Who was involved in developing this charter? What are their titles and associations?

Risk Analysis and Contingency Planning

Whatever your role in your Hub, at some point it's likely you'll need to make a decision that involves an element of risk. Risk is made up of two parts: the **probability** of something going wrong and the **negative consequences** if it does.

Risk is often hard to identify, let alone prepare for and manage. If you're hit by a consequence that you hadn't planned for, partnerships, time and positive outcomes for our children could be on the line. Contingency planning will prepare your organization to continue its work even when threats are encountered.

Risk Analysis is a process that helps you identify and manage potential problems that could undermine key projects.

To carry out a **Risk Analysis**, first identify possible threats and then estimate the likelihood that these threats will materialize.

A strong approach to risk analysis and contingency planning can help you identify and understand potential risks and manage them proactively.

When to use risk analysis

Risk analysis is useful in many situations:

- Planning events and conferences, to help you anticipate and manage possible problems
- Planning your Hub's activities including community engagement, data collection, awareness raising, etc.
- Deciding whether to enlist a new partner or service provider
- Considering engaging a new community group or an existing group in a new way
- Planning for leadership transitions at the Hub or partner level

How to use risk analysis

To carry out a risk analysis, follow these steps:

1. Identify threats

The first step in risk analysis is to identify existing and possible threats. These can come from many different sources. For instance, they could be:

- Operational – Disruption to funding and operations or loss of access to communities
- Reputational – Loss of community or partner confidence in the Hub
- Procedural – Failures of accountability, internal systems or controls
- Project – Exceeding budget, taking too long on key tasks or experiencing issues with service quality, some groups are falling through the cracks and being excluded from program benefits
- Technical – Advances in technology or technical failure
- Political – Changes in public opinion or government policy

You can use several different approaches to conduct a thorough analysis:

- Run through a list such as the one above to see if any of these threats are relevant.
- Think about your objectives and the activities you will engage in to achieve them. Perform an analysis with other Hubs or partners to identify assets and weaknesses in your communities and within your network. Considering the gap between those assets and weaknesses, what threats or risks are most likely to have a negative impact on your work?
- Consider the systems, processes and structures you use, and analyze risks to any part of these. What vulnerabilities can you identify within them?
- Consult others who might have different perspectives or experiences. Ask for input from your partners or other Hubs and collaboratives across the state.

2. Estimate risk

Once you've identified your threats, calculate both the **likelihood** of these threats being realized and their **possible impact**.

The scale below can help you assign probability and impact values. The risk analysis matrix at the end of this section will also help you organize this process.

Probability/Likelihood:	Impact:
Not likely	Minimal *(when isolated, little impact, no need for action)*
Possible	Significant *(some impact, monitor/assess for action)*
Likely	Major *(high impact, requires immediate action)*
Very likely	Severe *(disabling impact, requires immediate action)*

Tip:
Don't rush this step. Gather as much information as you can so you can accurately estimate the probability of an event occurring, along with the associated impacts. Use past data as a guide if you don't have an accurate means of forecasting.

How to manage risk

Tip:
Look for cost-effective approaches. It may be better to accept the risk than use excessive resources to eliminate it.

Once you've identified the probability and potential impact of your risks, you can plan how to manage them.

1. Avoid the risk
In some cases, you may want to avoid the risk altogether. This could mean not getting involved in a new intervention, passing on a project or skipping a high-risk activity. This is a good option when taking the risk involves no advantage to your Hub's mission and objectives.

2. Share the risk
You could also opt to share the risk – and the potential gain – with other groups, collaborations, organizations or third parties.

3. Accept the risk
Your last option is to accept the risk. This option is usually best when there's nothing you can do to prevent or mitigate a risk, when the potential loss is less than the cost of insuring against the risk, or when the potential gain is worth accepting the risk.

How to control risk

If you choose to accept the risk, there are a couple of ways to reduce its impact.

- **Preventive action** involves aiming to prevent a high-risk situation from happening. It includes health and safety training, firewall protection and cross-training your partners and teams.
- **Detective action** involves identifying the points in a process where something could go wrong and putting steps in place to fix the problems promptly if they occur. Detective actions include double-checking finance reports, conducting effectiveness testing before a new education course is taught, or maintaining close communications and relationships with communities.

Contingency Planning

Developing your plan

As you begin, be aware that people can get so emotionally invested in "Plan A" that they're not as motivated to consider "Plan B." You can avoid many obstacles by thoroughly thinking through your contingency plan now. Stress the importance of this with your planning team.

Remember these guidelines when it's time to prepare your contingency plan:

- **Your main goal is to continue to coordinate and measure services delivered** – Look closely at what you need to do to deliver a minimum level of service and functionality.
- **Define time periods** – What must be done during the first stage? Within the first week? Within the first month? If you look at the plan this way, you're less likely to leave out important details.
- **Identify the trigger** – What specifically will cause you to implement the contingency plan? Decide which actions you'll take and when. Determine who is in charge at each stage and what type of reporting process they must follow.
- **Keep the plan simple** – You don't know who will read and implement your plan when it's needed, so use clear, plain language.
- **Consider related resource restrictions** – Will your collaborative be able to function the same way if you need to implement your contingency plan, or will it necessarily reduce capabilities?
- **Identify everyone's needs** – Have people throughout the collaborative identify what they must have, at a minimum, to continue operations.
- **Define "success"** – What will you need to do to return to "activity as usual?"
- **Include contingency plans in your standard operating procedures** – Provide initial training on the plan and update everyone when you make changes.
- **Manage your risks** – Look for opportunities to reduce risk wherever possible. This may help you reduce, or even eliminate, the need for full contingency plans in certain areas.
- **Identify operational inefficiencies** – Provide a standard for documenting your planning process, and find opportunities for performance improvement.

Maintaining your plan

After you prepare your contingency plan, you'll need to do several things to keep it practical and relevant – don't just create a document and file it away. As your collaborative changes, you'll need to review and update these plans accordingly. Here are some key steps in the contingency plan maintenance process:

- Communicate the plan to everyone in your organization.
- Inform people of their roles and responsibilities related to the plan.
- Provide necessary training for people to fulfill these roles and responsibilities.
- Assess the results of training, and make any necessary changes.
- Review your plan on a regular basis, especially if there are relevant environmental, operational and personnel changes.
- Distribute revised plans throughout the collaborative, and discard any old plans.
- Keep copies of your plan off-site in a place where they can be accessed quickly when needed.
- Audit your plan periodically:
    - Reassess the risks to the collaborative.
    - Compare actual risk-control efforts with the performance levels described in your plan.
    - Recommend and make changes, if necessary.

How to use the risk analysis matrix

The matrix below helps you rate potential risks on two dimensions. The **likelihood** that a risk will occur is represented on the x-axis of the chart, and the **potential impact** of the risk, if it occurs, on the y-axis. You use these two measures to plot risks on the chart, giving you a quick, clear view of the priority you need to give to each. You can then decide what resources to allocate to manage that particular risk.

1. Above, you listed all the risks that your Hub is likely to face, and assigned each of them values based on probability and potential impact. Using these assignments, map them on the matrix.
2. Develop a response to each risk, according to its position in the chart. Remember, risks in the bottom left corner can often be ignored, while those in the top right corner need more time and attention.

Low impact/low likelihood – Risks in the bottom left corner are low level and can often be ignored.
Low impact/high probability – Risks in the top left corner are of moderate importance – if these things happen, you can manage them. Try to reduce their likelihood.
High impact/low probability – Risks in the bottom right corner are of high importance if they do occur, but they're very unlikely to happen. Do what you can to reduce their impact if they do occur, and create contingency plans in case they do.
High impact/high probability – Risks towards the top right corner are critical. These are your top priorities and are risks that you must pay close attention to.

Adapted from Mindtools.com's Risk Assessment and Contingency Planning toolkit.

Risk Analysis Matrix

Potential Impact	Unlikely	Possible	Likely	Very Likely
Severe				
Major				
Significant				
Minimal				

Likelihood

ORID Focused Conversation Method

The purpose of the ORID process is to:

- Enable participants to reflect on an event or shared experience (e.g., lecture, quotation, article, television program or meeting), interpret the experience, and **decide what to do** as a result.
- Enable participants to listen to one another's perceptions and emotional responses, suspend judgment during the discussion, and as a result gain a broader and deeper understanding of an experience.

The method was developed by the Institute for Cultural Affairs to enable users to analyze facts and feelings, ask about implications and make decisions intelligently. It is a strategy for avoiding unfocused, unproductive and often destructive meetings.

Stages

The ORID conversation method follows the standard human process of understanding, analysis and action, which leads to a decision-making stage. During an ORID conversation, a facilitator takes the group through four distinct stages of questioning:

- **O**bjective questions
- **R**eflective questions
- **I**nterpretative questions
- **D**ecision questions

The facilitator begins the process by preparing questions for the group. Use the included **ORID Focused Conversation Prep Chart** to identify your topic, choose questions and define your aims. At the beginning of the session, the facilitator should explain the objective of the process and its structure. It may help to explain the four stages so participants stay on task. If participants bypass a stage, try to calmly guide them back to the stage you're in. Ask each participant to give only one idea at a time to encourage as many people as possible to participate. For each question, a scribe writes the main points on a flipchart.

During the conversation, acknowledge any differences in perception or memory. It may be helpful to record these ideas on the flip chart as well. Summarize or ask for further explanation when needed.

In all four stages, careful phrasing of questions and statements is critical to maintaining a focused discussion. Questions need to be:

- Prepared beforehand, tailored with care and related to the experience itself;
- Open-ended and specific; and
- Sequenced (start with easy questions).

See the **ORID Focused Conversation Question List** for more examples in each category.

1. Objective questions: Facts, data & senses (“What?”)

Objective questions are used to draw out facts and observable data about an event or topic. Through this process, participants learn there are different perspectives of observable reality. Questions relate to thought, sight, hearing, touch and smell. For example:

- What images or scenes do you recall?
- Which people, comments or words struck you?
- What ideas/people caught your attention and why?

2. Reflective questions: Reactions, heart & feelings (“Gut?”)

Reflective questions relate to the affective domain of emotional responses, moods and hunches. Examples include:

- How did _____ affect you?
- Were you concerned at any time?
- Were you surprised at any time?

If individuals have difficulty identifying feelings, the facilitator can give suggestions. For example, “During the experience were you surprised/angry? Intrigued/confused?” Participants frequently respond to correct the questioner regarding the intensity of the feeling suggested (for example, “No I wasn't angry, I was livid”).

3. Interpretative questions: Critical thinking (“So what?”)

This is the analytical phase of the discussion. This stage is based on information derived during the Objective and Reflective stages to give the topic perspective and allow participants to explore potential impacts.

Through the questions, participants are invited to consider the value, meaning or significance of the event for them. By hearing other people’s viewpoints, participants then put their thoughts into perspective. For example:

- What does it mean to you/the organization?
- What was the most meaningful aspect of this activity?
- What can you conclude from this experience?

4. Decisional questions ("Now what?")

This is the stage in which a decision is produced. It is based on information from the three previous stages. For example:

- So, with all of this taken into account, what are we going to do?
- How should we proceed?
- What would you say to people who were not at this meeting?

You might set the scene for this critical question by recapping the findings of the previous three stages. The discussion in the decisional stage focuses on the future. What is the best course of action? What are achievable, positive outcomes? What is realistic given our limited resources?

Adapted from ORID instruction by The Commons Group at Kettering.org. The method was developed by The Institute of Cultural Affairs.

Focused Conversation Worksheet

Topic:

Rational Aim:

Experiential Aim:

Opening:

Your intents for each level:

Objective:

-
-

Reflective:

-
-
-

Interpretive:

-
-
-

Decisional:

-
-

Closing:

Sample Questions for Each Level of the Focused Conversation

Objective Questions

1. What object do you see? What did you see?
2. What words stand out?
3. What are some of the things we did today?
4. Who were the characters? Who was there?
5. What are some events you recall in the past year?
6. What do you notice about this new form?
7. Who was present at the meeting? Who spoke?
8. What scenes do you remember?
9. What facts do we know about this situation?
10. What caught your attention about _____?
11. What are some teams you've been a part of?
12. What headlines have caught your attention this week?
13. What lines of dialogue do you recall?
14. What do you think of first when I say the word(s) _____?
15. What were the key points in the speech?
16. What behaviors or responses have you observed?

Reflective Questions

1. What parts reminded you of your own _____?
2. Where were you anxious?
3. What made you feel appreciated?
4. What seemed boring?
5. What is most exciting?
6. Where are you really clear? Where confused?
7. What concerns you?
8. What was annoying?
9. Where are you confident? Where is more work needed?
10. What gives you courage?
11. What seems the most critical?
12. What are you most doubtful about?
13. What was inspiring?
14. What color would you add? Why?
15. What was really easy? Most difficult?
16. What music would you play? Why?

Interpretive Questions

1. What is the importance of this?
2. What new vantage point has this given us?
3. What difference will it make?
4. What would you say lies underneath these issues?
5. How has this been beneficial to you personally?
6. What appears to be the central issue or key problem area?
7. What other things do we need to consider?
8. What kind of decisions do we need to make as a group?
9. What is being recommended here?
10. What options are open to us?
11. What questions did this raise for you?
12. What insights are beginning to emerge?
13. When have you experienced this?
14. How have other groups dealt with these issues?
15. What kinds of changes will we need to make?
16. What are the values we are holding here?

Decisional Questions

1. What are these themes really about?
2. Tell a story about what this is about.
3. What would it look like for you to act in this way?
4. What does it mean to have experienced this?
5. So just what have we decided?
6. What does this mean for our future?
7. How will you title our final product?
8. So, just what have you learned?
9. If we did this again, what would we change?
10. What are we really committed to?
11. Then, what are the first steps we need to take?
12. What is the resolve of this group?
13. How would you articulate our consensus?
14. What will you do differently?
15. What name will you give to our time together?
16. What applications or action ideas has this session triggered for you?

The Conversation Preparation Chart Exercise

Think of an important interaction you will participate in within two weeks.

Characteristics of the interaction:

- It is important to you.
- You are not certain the interaction will be successful.

Print a copy of the Conversation Prep Chart and follow these instructions:

1. Write down your sincere opinion about the upcoming interaction. No one will see this but you, so you can express yourself honestly.
2. Next, answer this question: Who are the crucial people in the interaction?
3. List names of the people involved in the far left column. Start with yourself.
4. For each person, fill in the purposes, concerns, and circumstances that are important to that person. Purposes are what they are *for* and concerns are what they are *against*.
    a. It is important to do the best job you can of filling in the spaces from <u>their</u> point of view. Here are three ways to do that:
        i. If you have personal experience or direct access to the information, use the person's actual words to describe his or her purposes, concerns, and circumstances.
        ii. Use a personal contact: If you know someone with direct access to the person, ask your contact how the person would express his or her important purposes, concerns, and circumstances.
        iii. If you do not have personal access or a contact who does, ask yourself this question: "If I had their accountability, what purposes, concerns, and circumstances would be important to me?"
5. At the bottom of each column, write down intersections: anything you see in common as you scan all the information in the purpose boxes, concern boxes, and circumstances boxes. If you see common words, be sure to use those words in your intersection boxes.
6. Next, use the words in the intersections boxes to draft an authentic purpose for the interaction. The purpose will be "magnetically" attractive to the people involved, because it is the <u>intersection</u> of their purposes, concerns, and circumstances.
    a. Test your purpose with one or more participants and see if you have designed a "magnetic meeting."
    b. If you are hosting the meeting, design your agenda to achieve the authentic purpose.
    c. If you are not the host, simply keep your attention on the purpose as you prepare for the meeting and while you are in it.
7. Final step: In the far right column, assess your relationship with the others in the interaction. Where are <u>you</u> on the meter regarding each person? If currently below accuracy or authenticity, make a conscious decision to converse above "50." Interactions below "50" lack learning so they cannot stimulate new insights and new, valuable actions.

If you follow these steps, we predict you will have a far more productive interaction.

CONVERSATION PREP CHART

WHAT CONVERSATION IS IT TIME FOR NOW?

MY SINCERE OPINION:

RELATIONSHIP STATUS

KEY PEOPLE	PURPOSES (FOR)	CONCERNS (AGAINST)	CIRCUMSTANCES (FACTS)	
ME				
INTERSECTIONS:				

AUTHENTIC PURPOSE:

CONVERSANT
HIGH-PERFORMANCE CONVERSATION

Moving up the Meter: Above 50, the Conversation Shifts

BELOW 50—WASTE	ABOVE 50—VALUE
Protect and justify • Already know, do, have	**Listen to learn** • Poise: true to purpose
Fear & domination • Fight, Flee, Freeze, Appease	**Fact-based, purpose-driven**
Resistance → convince • How can I prove them wrong?	**Resistance → research** • What is important to them?
Irrational judgment • My reaction = the truth about you	**Intelligent judgment** • Hold lightly, research, and compare
Listen at the speed of opinion	**Listen at the speed of comprehension**
The bioreactive amygdala dominates	***Activating the cortex enables connection and presence***

To move up the meter, the fundamental shift is in listening.

BELOW 50: I'm listening to justify, validate, and protect what I already know. It is more important to me that I convince you of the rightness of my position than that I discover something new.

ABOVE 50: The test for listening becomes learning. I become fact-based, and committed to a shared purpose rather than to "winning the point."

When I discover resistance, I do research to uncover new facts or better understand different positions.

I hold my own facts and opinions lightly and compare them with what others know and believe.

CYCLE OF VALUE DIAGNOSTIC

TOPIC: DATE:

CONVERSATION		PURPOSE	OFF TRACK	WEAK	ON TRACK
	Intersect	Identifying key constituents and mutual purpose	☐	☐	☐
	Invent	Inventing a surplus of ideas to fulfill the mutual purpose	☐	☐	☐
	Invest	Creating effective plans and processes; making resource decisions	☐	☐	☐
	Engage	Effectively connecting actors to strategic action	☐	☐	☐
	Clarify	Clarifying precise expectations	☐	☐	☐
	Close	Committing to goals and launching action	☐	☐	☐
	Review	Looking back to accurately understand victories and disappointments	☐	☐	☐
	Renew	Applying insights, adjusting goals, improving performance	☐	☐	☐

CONVERSANT
HIGH-PERFORMANCE CONVERSATION

Proposal Composition Guide

Your Hub will be required to raise significant matching funds to continue its work and ensure continued funding from the state. There are a few ways to do this, and one of the most effective is through the grant proposal. It is an opportunity to very clearly outline the reasons your Hub should receive financial support for its work. This section will help guide you through writing competitive proposals so even if you don't have a dedicated proposal writer on your team, you can still respond to a request for applications or proposals to continue your work.

Read the instructions

Identify what the donor wants and requires, both programmatically and in terms of proposal format and submission. Highlight key pieces to remember or that may present challenges. Follow all directions completely, including font size and spacing, page numbers, margins and page numbering.

Write an outline

Begin your outline by making headings for each section you will include. Much of this content will be prescribed by the RFA or RFP. Consider the overall argument you want to make to the donor, and structure your outline accordingly. Add bullets under each heading that will guide your key points and contribute to an overall compelling message.

Begin with a strong executive summary

The executive summary should very clearly present all the important parts of your program, not just project-specific elements. Answer these questions in the executive summary:

What is the problem to be addressed?
What is your solution?
Why is your Hub best positioned to respond to the problem?
What will the environment look like following your intervention?

Use the executive summary to make your reader feel positive about reading the rest of your application. It sets the tone. Whoever reads this will also be reading many other strong applications, so highlight how your Hub and proposal stand out from the crowd. What are your particular strengths? Why will your program be more effective than others? What is your competitive edge? Continue to emphasize and reiterate these aspects throughout the proposal.

Writing Tip

Keep your writing clear and consistent in voice, language and flow. Use the active voice whenever possible. Your organization is performing the action and making the change. The action is not just "being done" and the change is not simply "coming about."

Open with main ideas

Don't wait to present your main ideas. Your reader should understand your main points and primary programmatic elements very early in the proposal. Details will come in their appropriate sections, but the overall structure and components should be clear within the first two pages of the narrative.

Be local, specific and concrete

Include as much detail as you can without making your language cumbersome or constricting. Show the reader you know very well, ideally better than anyone else, what you're talking about. You are well-acquainted with the problem, the communities it affects and what has been tried in the past. You also know how to address it, and your Hub is the best one to do so. To be convincing, you must be specific. If you're not sure of a detail, get the information you need to be sure. Use locally specific language to describe local contexts and strategies.

Writing Tip

Be specific! A good way to check for language or descriptions that are too vague is to ask yourself if it answers the question "how?"

"Our Hub will coordinate services provision."

How will it do that?

Write simply, directly and concisely

Be clear. Use simple phrases. Be direct. Don't say more than you need to. Use a conversational tone, and be assertive. Avoid using jargon or highly technical terms your readers might not know.

Use graphics effectively

Graphics can be very valuable tools in proposal writing. They offer alternative and often more effective ways to understand key pieces of your program. In a long proposal, they also give your readers a visual and intellectual break from pages of narrative text, refreshing their ability to fully comprehend your message. Unfamiliar processes, systems, organizational relationships and intervention tactics are often easier to describe graphically than through text alone.

Writing Tip

Text boxes can very effectively draw your reader's attention to a unique or vital piece of your program, highlight an impressive statistic or outline key partnerships.

Review and revise!

To make your proposal as strong as possible, plan to spend nearly as much time reviewing and revising as you do writing. It is best to have at least one reviewer who was not involved in the writing, and ask them to give very candid feedback. The people who will implement and manage the program need to read it and agree it is feasible. Ask for technical feedback – is it clear? Is it accurate? How could it be better? Separate yourself from your writing as much as possible so you feel comfortable asking for real help from others. Be specific about what kind of feedback you need. This will prevent people from simply doing redundant copy edits. Finally, double-check that your proposal is responsive to the RFA/RFP, includes all your key points and strengths, is doable, and meets all the donor's requirements.