Julie Orr Consulting

Technical Communication Consultant and Business Analyst

Capabilities and Sample Work

Introduction

Julie Orr Consulting focuses on technical communication and business analysis, bringing expertise and passion for technical communication to private and public sector clients. As an independent and agile consultant with an entrepreneurial spirit, I partner with businesses to bring clarity to complex work—leading with collaboration, initiative, and a tailored approach to see your projects thrive. Every engagement is addressed with intention and rigor.

- Over 20 years of experience translating complex information into clear, concise, and compelling content that enables people to consume the information quickly and effectively.
- Master of Science degree in Technical Communication with a focus on user-centered design and instructional design.
- Flexible, strategic, responsive, and friendly.

Capabilities

Business Analysis

- ✓ Analyze and document complex workflows
- ✓ Identify process inefficiencies and opportunities for improvement
- ✓ Transform abstract requirements into concrete, actionable specifications
- ✓ Develop process flow diagrams and documentation

Requirements Elicitation & Analysis

- ✓ Facilitate collaborative and productive stakeholder interview sessions
- ✓ Create questionnaire forms for collecting quantitative and qualitative data
- ✓ Create clear, actionable specifications
- ✓ Develop requirements traceability matrices for tracking and compliance

Technical Documentation & Communication

- ✓ Create user guides and training materials
- ✓ Develop RFPs and scope of work statements
- ✓ Transform complex technical concepts into accessible content
- ✓ Design knowledge transfer and onboarding materials

Proposal Development & Strategy

- ✓ Lead multi-million-dollar proposal responses
- ✓ Develop winning strategies and value propositions
- ✓ Creating compelling narratives that align with client needs
- ✓ Coordinate cross-functional proposal teams

Who I Work With

- IT consulting firms
- State agencies navigating complex system implementations or upgrades
- SaaS and technology teams
- Organizations improving alignment

Sample Work

Requirements and Statements of Work

Example 1:

Context

Colorado Parks and Wildlife (CPW) is an enterprise state agency, relying primarily on license sales, state parks fees, and registration fees to support its operations, including 43 state parks and more than 350 wildlife areas covering approximately 900,000 acres, management of fishing and hunting, wildlife watching, camping, motorized and non-motorized trails, and boating and outdoor education. CPW's work contributes approximately $6 billion in total economic impact annually throughout Colorado.

Problem

Each conservation, recreational, park, and wildlife business unit across CPW operates independently, and yet, must coherently function as a unified agency to perpetuate the wildlife resources of the state, to provide a quality state parks system, and to provide enjoyable and sustainable outdoor recreation opportunities that educate and inspire current and future generations to serve as active stewards of Colorado’s natural resources. Each business unit uses a variety of platforms, databases, and productivity tools to conduct their day-to-day business and activities. Many of the agency’s business units’ forms, records, and program information, etc. are stored in physical file storage, on computer hard drives, or shared drives across the State, which makes it difficult to standardize, correct, access data or records, and key information on the agency’s initiatives easily and effectively.

Contribution

I started as a contract Business Analyst with CPW in 2020 and am still working with the Agency in 2026. I have led business analysis efforts for over 40 enterprise-level system implementations and/or updates to existing systems. I conduct interviews with a variety of business and technical stakeholders to understand their business and technical processes, understand their pain points, and their vision for the future of their work. I also conduct research to understand their programs and the nature of their work so that I can define and develop specific statements of work narratives, business, functional, and non-functional requirements for new systems, and document current and future workflow diagrams. As part of this important work, I create process documentation and diagrams to assist cross-function teams of stakeholders with workflows illustrating new processes being implemented because of new systems or upgrades to existing systems.

I work with the various business units across Colorado Parks and Wildlife to develop the statements of work, and the business, functional, and non-functional requirements. I also create workflow diagrams, and a variety of exhibits or appendices to give potential vendors more context for understanding CPW's business needs and operations.

Impact

- Stakeholders align more clearly with consistent meetings to discuss processes, system(s), governance, and goals.
- Ensure implemented solutions support end-user needs, workflows, and solve real business problems.
- Identify process inefficiencies and opportunities for improvement.
- Transform abstract requirements into concrete, actionable specifications.

Sample pages from a statement of work

III. Background

Colorado Parks and Wildlife (CPW) is an enterprise agency, relying primarily on license sales, state parks fees, and registration fees to support its operations, including 43 state parks and more than 350 wildlife areas covering approximately 900,000 acres, management of fishing and hunting, wildlife watching, camping, motorized and non-motorized trails, and boating and outdoor education. CPW's work contributes approximately $6 billion in total economic impact annually throughout Colorado.

In November 2024, the Parks and Wildlife Commission (PWC) approved changes to CPW's Commercial Use Regulations, which affects the policies, fees, and processes for individuals or entities applying, purchasing, and being issued a commercial use activity or event permit. Prior to the new regulations going into effect, CPW parks and wildlife properties operated independently in their permit policies, fees, and processes. The agency expects that the updated regulations will provide a more consistent and transparent permitting process across Colorado Parks and Wildlife owned and managed parks and wildlife properties. As part of the updated regulations, the agency will also standardize permit applications and other permit-related forms, and fees for consistency and ease of use across the state.

As was the case before the updated regulations, each park and wildlife area is responsible for reviewing and approving permit applications, charging and collecting permit fees, and overseeing the individuals and entities that are issued activity and event permits. The parks and wildlife areas differ in the allowable activities and events they issue permits for. For example, the Arkansas Headwaters Recreation Area, located in the southeastern part of the state in Salida, CO, typically issues permits appropriate for that area such as boating permits, walk and wade, climbing, and shuttle service. Another CPW Park located in the southeastern region called Lake Pueblo, typically issues permits for river and reservoir guides, kayak permits, and jet ski rentals. Lori State Park, located in the northeastern part of the state, issues permits for food trucks, guided bike rides, rock climbing guides, etc. The number of permits issued varies by location. A busy park in the southeast region of the state issued 94 commercial use permits in 2023. Another park in the southeast region issued 22 commercial use permits in 2023. Most parks and wildlife areas issue on an average between zero to five permits a year.

CPW park and wildlife managers use a variety of tools to administer and manage the permits, often using a Google suite of applications to support their processes. Permit applications are typically formatted as fillable PDF documents. Customers submit their applications by emailing, mailing, or walking in their forms. All customer-related permit information is stored on internal CPW servers, Google drives, or in hardcopy files. Park or wildlife managers communicate with applicants and permittees about applications, permits, status, reports, fees, etc. through email, phone, and face-to-face conversations. The managers and park staff track permits via Excel, Google sheets, and/or third-party systems. Some parks and wildlife areas may use other tools that are not captured in this summary due to how independently the parks and wildlife areas operate.

Administering and managing permits is time consuming for the park and wildlife managers and staff. They spend many hours tracking down information from applicants and permit holders, entering information into spreadsheets, customizing and generating the permits, and communicating with internal and external stakeholders. Additionally, there is currently not a good way for CPW to share information about permits and permit holders with other parks and wildlife areas. Many staff expressed that it would be beneficial for the park and wildlife areas to know that a previous permit holder did not perform well or follow the rules of the park or wildlife area during their permit activity or event. The varied processes, rules, fees, etc. have historically not served the customer efficiently and effectively. Customers have had to rely on CPW staff at the parks and wildlife areas to get relevant information about applying for permits. Additionally, they often do not know what activities/events are appropriate for the area where they want to get a permit, what the fee structure for the park/wildlife area is, or what other required documentation they will need to submit to CPW to be issued a permit.

Park and wildlife managers and staff are spending a significant amount of time communicating with permit applicants, permit holders, and performing manual processes and tasks that would be better spent managing the parks and wildlife areas. At the same time, customers are spending too much time tracking down accurate information and applying for permits. CPW anticipates that the new regulations will help to alleviate some of the burdens placed on the staff and customers by providing a consistent and transparent process across Colorado Parks and Wildlife owned and managed properties. However, the agency needs a technology solution that will facilitate and support streamlining the processes, payments and tasks associated with issuing commercial use activity and event permits.

IV. Statement of Work

To ensure that the new Commercial Use Regulations are upheld and administered as appropriately as possible, CPW needs a unified permit management system to enable more consistency in processes, procedures, and fees for issuing commercial use activity and event permits. CPW also anticipates that a unified permit management solution will make the permit application, issuing process, and fee structure more customer-friendly and transparent for the customers.

CPW is seeking a vendor to develop a vendor hosted/supported modern, unified, and user-friendly permit management solution to facilitate and support CPW park and wildlife area managers and staff administer and manage commercial use activity and event permits across the State of Colorado. The solution must be designed to allow CPW park and wildlife managers and staff to easily implement and manage the fundamental permit issuing process including:

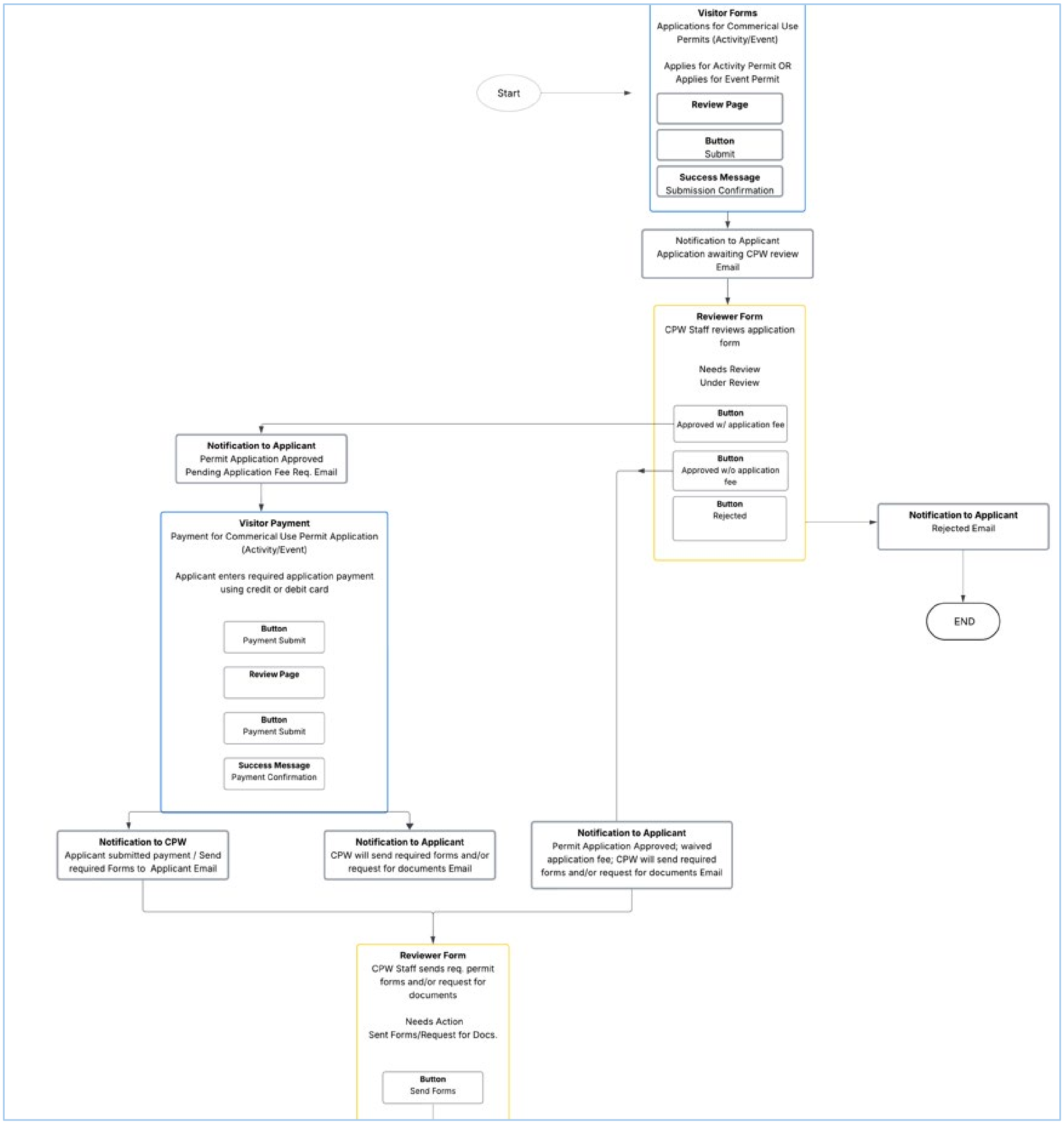
1. Assessing park and wildlife areas to plan what activities and/or event permits will be allowed for a season's time and establishing what forms and supporting documents are required for the allowable activities and events for each property, managing permit application information and communication.
2. Screening individuals or entities who are interested in getting a permit; accepting commercial use activity and event permit applications; managing permit application questions.
3. Reviewing applications and approving applications. The CPW Property Manager may make permit-specific alternative arrangements as allowed by CPW regulations. See CPW Regulations Chapter P-7 #712, and Chapter W-9.
4. Requesting additional approval signoffs on specific permits from CPW personnel.

5. Sending entities/individuals who are approved communication about next steps in the permit process (further instructions on supplemental documentation required and information on fees that will be charged to the permittee).
6. Managing/tracking what information is due, received, etc. from an approved application.
7. Issuing permits.
8. Managing/tracking permits are issued for a park or wildlife area.
9. Monitoring permit holder's activity or event to make sure they're in compliance with the rules and regulations.
10. Issuing final invoices and instructions for final reports due from permit holders (if applicable).
11. Processing final payments and reports.
12. Closing out the permittee's permit.

The solution must be designed to allow CPW Park and Wildlife managers and staff to easily record and have access to data about permit applicants, approved permit holders, commercial use activity and event performance. It must also allow CPW to run reports for analysis on permit allocation and management. The system must be web-based and mobile-friendly to accommodate a geographically dispersed audience of internal and external users.

The project will include hosting, securing, maintaining, and supporting a permit management solution.

CPW vision of the future workflow is shown below:



Example 2:

Context

Colorado Department of Public Health and Environment (CDPHE) is one of Colorado's 16 cabinet-level departments. The department serves Colorado by providing public health and environmental protection services that promote health for people and the places for which they live in Colorado. As part of the department's work, they identify and respond to emerging issues affecting Colorado's public and environmental health. Some of CDPHE's programs and activities include:

- Chronic disease prevention
- Control of infectious diseases
- Family planning
- Injury and suicide prevention
- General promotion of health and wellness
- Air and water quality protection
- Hazardous waste and solid waste management

Problem

CDPHE's Data Modernization Initiative (DMI) was a multi-year effort to modernize core data infrastructure across the federal and state public health landscape. CDPHE, in collaboration with several other public health jurisdictions, including Kansas, Missouri, Nevada, and Utah, created a Disease Surveillance System Modernization program to meet the DMI goals and objectives. The department needed a Business Analyst/Technical Writer to develop an RFP to solicit responses from service and solution providers that were able to design, build, and implement a flexible, open source, cloud-based, highly secure and configurable, comprehensive surveillance and outbreak management application and the underlying architecture for the application.

Contribution

In 2021, I contracted with CDPHE as a Business Analyst and Technical Writer to develop the RFP. I worked with the DMI Project Manager, technical and business SMEs, and other stakeholders to identify resources (reports, presentations, websites, etc.) that would help me articulate the goals and objectives of the initiative, and convey the vision CDPHE had for the application's architecture. In less than four months, I had developed the RFP and a package of supplemental information.

Impact

- The RFP was published and distributed two months earlier than the target date; resulting in a faster RFP process and vendor selection.
- CDPHE procured a solution that replaced more than nine separate systems with one integrated solution that helps CDPHE and other participants identify,

investigate, and mitigate communicable diseases and outbreaks across the State of Colorado.

Sample pages from the statement of work

SECTION 2: STATEMENT OF WORK

This section provides the Offeror with a general overview of the requirements contained within this RFP. Additional information regarding the specific requirements are detailed in this RFP and Exhibit A.

2.1. Introduction

The State of Colorado's Department of Public Health and Environment (CDPHE)'s Disease Control and Public Health Response Division (DCPHR) is soliciting proposals from qualified Offerors for data architecture modernization solutions to enable an integrated data management, sharing, and analytics ecosystem that enhances and accelerates DCPHR/CDPHE's disease management, sharing, reporting, and analysis capabilities, resulting in improved public outcomes for Coloradans and our nation.

The intent of this RFP is to implement the future state design and road map DCPHR crafted in partnership with the Advisory Committee, which brings a modernized system architecture for disease surveillance.

The road map outlines a path for the future state vision and architecture implementation that will be delivered over the next two years. The road map and specific use cases for functionality and data integration goals to be delivered include, but are not limited to:

1. Enterprise architecture/application architecture services;
2. Technical definition & design services;
3. Application modernization services & automation services (not in scope for this RFP);
4. Testing services;
5. Data management services;
6. Data integration/service enablement services;
7. Organizational change management services;
8. Transition planning & support services; and

9. Data migration services.

2.2. Background

The State of Colorado's Department of Public Health and Environment (CDPHE)'s Disease Control and Public Health Response Division (DCPHR) serves Coloradans by detecting, investigating, and responding to communicable diseases and the health effects of environmental and occupational exposures. DCPHR promotes disease prevention and epidemic control through the surveillance and monitoring of disease information; diagnosis of infection; distribution of vaccines and medications; and outbreak detection and response.

This request for proposal (RFP) is part of the DCPHR/CDPHE's overarching Disease Surveillance System Modernization (DSSM) initiative, which aligns with the Center of Disease Control's (CDC) Data Modernization Initiative (DMI). The vision is to create automated, integrated, real-time public health data and surveillance architecture across Colorado and nationally to promote improved disease prevention, detection, and response. The ultimate goal is to move away from fractured, cumbersome, and siloed systems and processes to an integrated, resilient, and flexible infrastructure that is ready to respond to the many challenges associated with disease monitoring and control. For more detail on the background of the DCPHR DSSM initiative please see Exhibit A.

In the winter of 2021 DCPHR assessed the current architecture and service model for a comprehensive disease surveillance system. This effort brought together stakeholders across each

DCPHR domain, Communicable Disease, Labs, Emergency Preparedness and Response, and Immunization, to align on a future state vision and architecture to support the long-term needs of disease surveillance for the State of Colorado. Current state documentation included an analysis of stakeholders, creation of a current state data flow, personas, journey, data flows, and technical inventory. This current state analysis gave the department a comprehensive view of disease surveillance architecture that had previously not been considered across the siloed domain areas.

As stated in the introduction, the intent of this RFP is to implement the future state design and road map DCPHR crafted in partnership with the Advisory Committee, which brings a modernized system architecture for disease surveillance. The road map outlines a path for the future state vision and architecture implementation that will be delivered over the next two years. These work products align to the Center for Disease's (CDC's) recommendations for data modernization and advances CDPHE's maturity in modern architecture and interoperable standards for disease control, including cross domain ingestion collaboration (electronic lab reporting (eLR), electronic case reporting (eCR), vital records, and syndromic surveillance (SyS)), shared business rules engines, electronic message staging areas, data lakehouse architecture, and modularized architecture to facilitate scale and interoperability.

There are primarily two core user groups, those that are internal to CDPHE and those that are external at LPHAs, providers, hospitals, and labs. Seven personas were used to characterize these user groups, described in the table below.

Persona	Roles	Key Tasks
Epidemiologists	Epis at CDPHE and LPHAs	Identify, document and respond to infectious disease
Informatician	Data managers & analysts Product owners Reporting techs	Data integration, manipulation, visualization, data entry and quality control
Case Investigator (CI) / Contact Tracer (CT)	CI/CTs at CDPHE CI/CTs at LPAs	Contact and interview potential cases to educate and collect information
Product manager	Product owner Branch chiefs	Translate vision for the development team; align on projects with various stakeholders
Public Health leader	Branch chiefs and directors CDPHE Directors LPHAs Directors	Report on data to inform public policy Responsible for data capabilities
Data Presenter	Communications team Training team	Communicate the data in layman's terms
IT / Infrastructure	DCPHR Tech OIT	Manage the infrastructure Ensure security and privacy

To meet the needs of disparate users and personas across disease surveillance, DCPHR has set out on a vision to create an enhanced disease management, reporting and analytics system that enables data entry, sharing, reporting and analysis, resulting in improved public health outcomes.

Successful implementation of a comprehensive disease surveillance system aims to meet the following success measures:

- Data entry: >20% reduction in case investigation call length
- Over 90% of quality data ingestion by volume is automated
- Highly usable data and self-service reporting functionality

- Interoperability and seamless transitions to other regulatory agencies
- >50% reduction in IT change requests as team is able to configure the system themselves
- 100% of data fields are defined in a data dictionary

To understand the idealistic view for the user experience in the future, and the capabilities that enable it, a service design blueprint for comprehensive disease surveillance was created (see Exhibit A for more detail). This resource can be used to reinforce program goals, identify users to consider, and strengthen ways to work towards this vision. It also includes the core capabilities required to bring the experiences to life.

Key themes included:

- **Seamless administration of business rules by CDPHE**. Data and workflow changes are configurable and do not require coding.
- Users feel like they are using **one system with unified data**, though the data may be housed in multiple applications. Users trust data from integrated systems and can trace data lineage.
- Users are completing advanced day to day disease surveillance by **analyzing data in near real-time to view trends across subgroups, pathogens, and cross referenced with other data sets** in the analytics layer.
- **Business rules and data needs are aligned**. Users are aware of processes that affect them, know who to go to for support, and have common understanding of data flowing through the system.
- **Data ingestion and integration of ELR, EMR, SyS, HIEs and eCR are fully automated**, resulting in reduced manual data entry and higher data quality.
- **All users have a shared baseline of data literacy to enable easier and more accurate applications of data**. Data available for reporting is trusted.

To meet these service requirements, DCPHR developed a future state architecture to help organize and break down the large, complex web of systems from point-to-point integrations to a digestible set of componentized layers. The future state architecture will serve as both a plan for the future state, as well as a mechanism to compartmentalize and discuss different aspects of the technology and data landscape. This modernization of the disease application architecture, reporting processes, and data management systems will prepare the Department for future pandemics and outbreaks as well as daily disease control and prevention efforts. This will ultimately allow the Department to provide better disease control services to the public and ensure the state is prepared to respond in an emergency.

In support of implementing the modernization initiative, DCPHR/CDPHE is issuing two RFPs:

1. **RFP #1**: Separate, but integral to the purposes of this RFP, seeks qualified bids to support the implementation of the open-source disease surveillance tool EpiTrax, to meet the State's core disease surveillance requirements for a broad range of conditions currently met by ten plus disease control systems. This new core disease surveillance application will be a part of the operational application layer within the comprehensive disease control ecosystem to fulfill the day-to-day operational needs of DCPHR.
2. **RFP #2**: *(this RFP)* Seeks qualified bids to integrate an underlying data system and data management infrastructure (ecosystem) to interface and support the new core disease surveillance platform. For the new core disease surveillance applications, there will need to be integration for all data to be fed back through a data ingestion layer and normalized into a data lakehouse, so that the data can be analyzed, shared, and used by the other systems and users.

The conceptual architecture shown below in Figure 1, illustrates DCPHR's future state architecture. Offerors should consider this as the future state environment as they respond to the technical requirements.

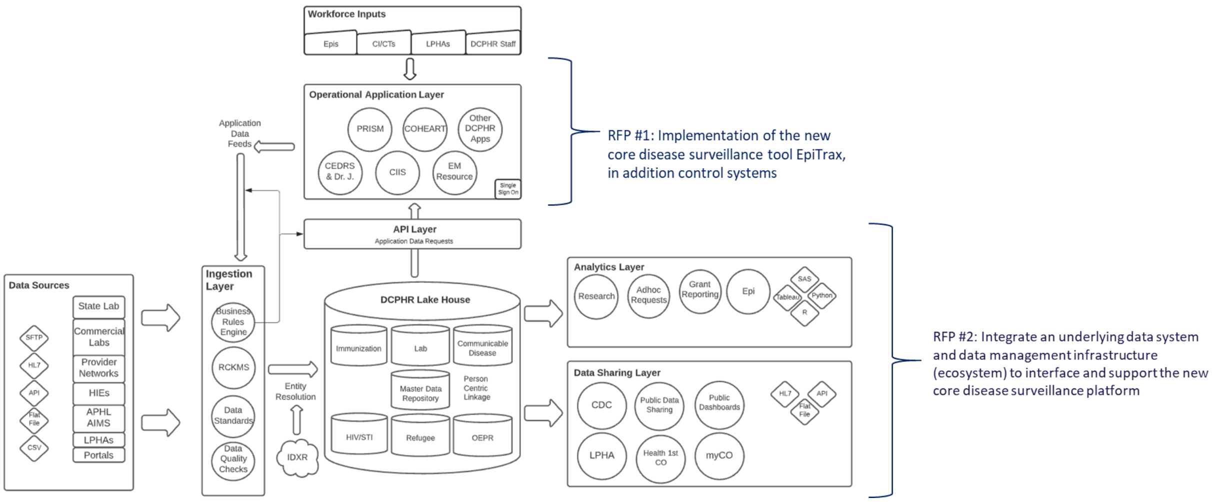


Figure 1 - DCPHR's Future State Architecture. RFP #1, not part of this RFP, is for the implementation of EpiTrax, a new core disease surveillance system. RFP #2, in scope for this RFP, is for integrated services for an underlying data system and data management ecosystem.

Technical Components Needed for Data Ingestion and the Data Lakehouse

In order to successfully break down silos and achieve the vision for a comprehensive disease surveillance system, DCPHR designed a componentized future state architecture aligned to the core elements below:

1. Ingestion Layer with Business Rules Engine
2. Data Lakehouse Layer
3. API Layer
4. Analytics Layer
5. Operational Application Layer (discussed in previous section; part of RFP #1)

By decoupling these architectural elements from applications, DCPHR will be able to break down the existing data silos and leverage repeatable technology services for data integration rather than complex point to point integrations.

More information about each core element is provided in Exhibit 1.

2.3 Overview and Statement of Work Summary

DCPHR seeks data architecture modernization solutions to integrate an underlying data system and data management infrastructure (ecosystem) to interface and support the new core disease surveillance platform. For the new core disease surveillance applications, there will need to be integration for all data to be fed back through a data ingestion layer and normalized into a data lakehouse, so that the data can be analyzed, shared, and used by the other systems and users. The core disease surveillance systems will include the new implementation of EpiTrax, and other State proprietary systems.

DCPHR expects that initial work will involve two priorities: 1) integrating core public health data with an aligned and single source of truth that is highly trusted and reliable, and 2) development of the strategy, architecture, and system and data transition plans in support of an enhanced disease management, reporting, and analytics system that enables data entry, sharing, reporting, and analysis, to improve public health outcomes.

The Offeror selected through this RFP will collaborate with DCPHR in the planning, implementation, integration of the ingestion, data lakehouse, API, analytics, and sharing layers with the applications layer to ensure uninterrupted operations. The Offeror selected through this RFP will also work with DCPHR for the planning and execution of transition activities as existing systems are replaced in whole or in part because of the modernization efforts.

Online Help

Example 1:

Context

CenturyLink (rebranded as Lumen Technologies) is a global communications services provider. As part of the company's offerings, they provide technical support, repair services, and billing assistance for their networking, edge cloud, collaboration, cybersecurity, and managed services technologies.

Problem

Lumen Technologies provides customers 24/7 technical support, repair services, and billing assistance primarily through a digital platform. To support customers, the company was creating a library of self-help support articles into the platform using Adobe Experience Manager. However, the business support team did not want to simply migrate legacy material over to Adobe Experience Manager. The material was written a long time ago, was also written from a 'system perspective' (versus a user perspective) and was not structured appropriately for a self-service support library.

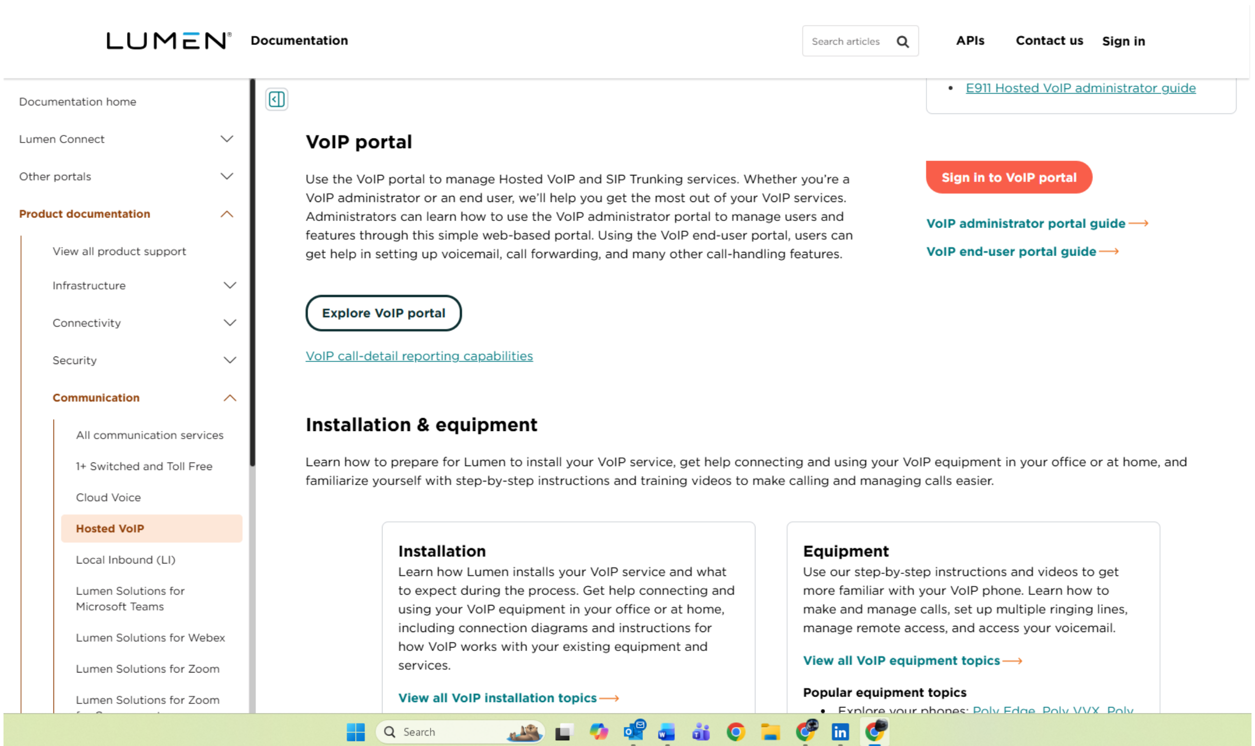
Contribution

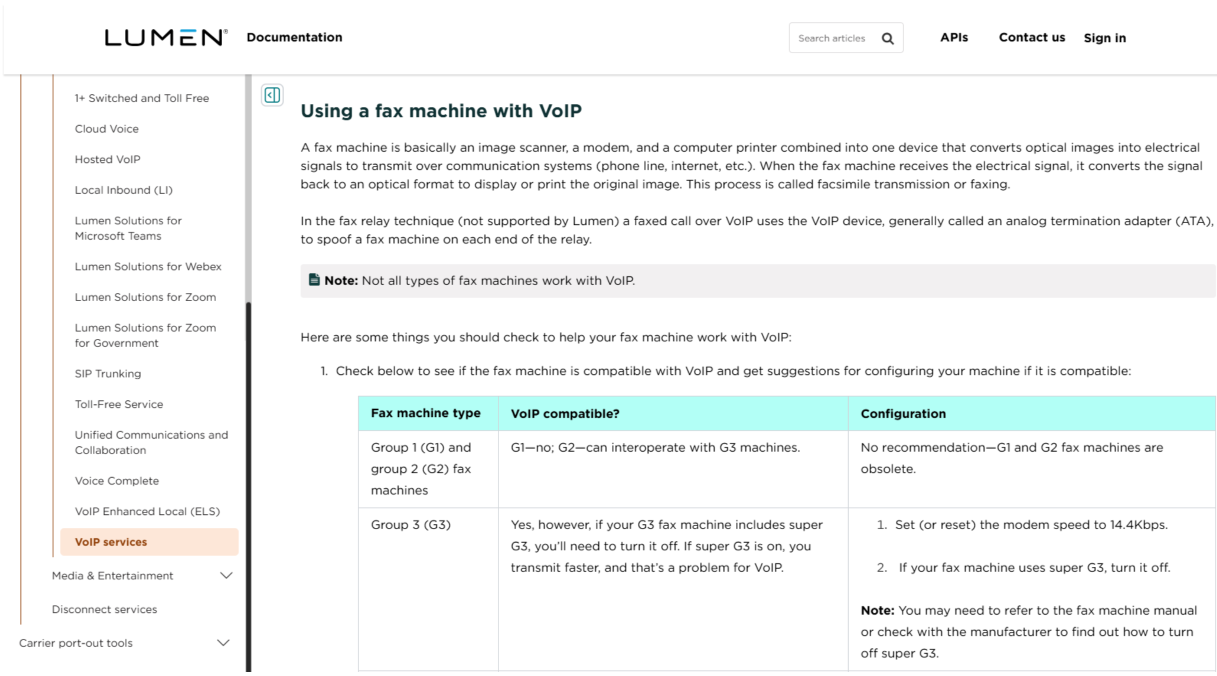
From 2018 through 2020, I worked as a contractor with CenturyLink (before it was rebranded to Lumen Technologies) on a small team of web authors to:

- Create Adobe Experience Manager (AEM) templates,
- Inventory the legacy documents to figure out what content we had
- Analyze the content and assess what revisions would be appropriate for the library
- Rewrite the content so that it was user-focused and task-based, and broken down to bite-sized structured articles for the online platform
- Collaborate with technical SMEs to validate that the content was accurate
- Insert and format the articles into Adobe Experience Manager templates
- Organize the content and assets, with appropriate meta language into the staging and production environments

Impact

- Through collaboration with CenturyLink SMEs and web authors created a revised VoIP business support content library of over 200+ articles.
- Co-created a CenturyLink Business Support style guide so that all content was properly and consistently written and branded.
- Customers were able to find and access the self-service articles they needed, which significantly cut down on support calls and time to support users with their questions.





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Carrier port-out tools

Using a fax machine with VoIP

A fax machine is basically an image scanner, a modem, and a computer printer combined into one device that converts optical images into electrical signals to transmit over communication systems (phone line, internet, etc.). When the fax machine receives the electrical signal, it converts the signal back to an optical format to display or print the original image. This process is called facsimile transmission or faxing.

In the fax relay technique (not supported by Lumen) a faxed call over VoIP uses the VoIP device, generally called an analog termination adapter (ATA), to spoof a fax machine on each end of the relay.

Note: Not all types of fax machines work with VoIP.

Here are some things you should check to help your fax machine work with VoIP:

1. Check below to see if the fax machine is compatible with VoIP and get suggestions for configuring your machine if it is compatible:

Fax machine type	VoIP compatible?	Configuration
Group 1 (G1) and group 2 (G2) fax machines	G1—no; G2—can interoperate with G3 machines.	No recommendation—G1 and G2 fax machines are obsolete.
Group 3 (G3)	Yes, however, if your G3 fax machine includes super G3, you'll need to turn it off. If super G3 is on, you transmit faster, and that's a problem for VoIP.	1. Set (or reset) the modem speed to 14.4Kbps. 2. If your fax machine uses super G3, turn it off. **Note:** You may need to refer to the fax machine manual or check with the manufacturer to find out how to turn off super G3.

See source [here](#).

Example 2:

Context

Locution Systems, Inc. builds custom fire station alerting solutions for state and municipal public fire stations. The company's communication center solutions are built to maximize fire station performance efficiencies to minimize first responders time to respond to emergencies.

Problem

As a startup, Locution develops and provides a suite of software, hardware, and accessory products for state and municipal public fire stations to automate fire station alerting, which improves response times, reduces call stacking, and minimizes first responders' stress. Although Locution products are well-received by fire stations around the country and Canada, they needed a dedicated Technical Writer to refine and/or create end user documentation for technical, support, and training teams.

Contribution

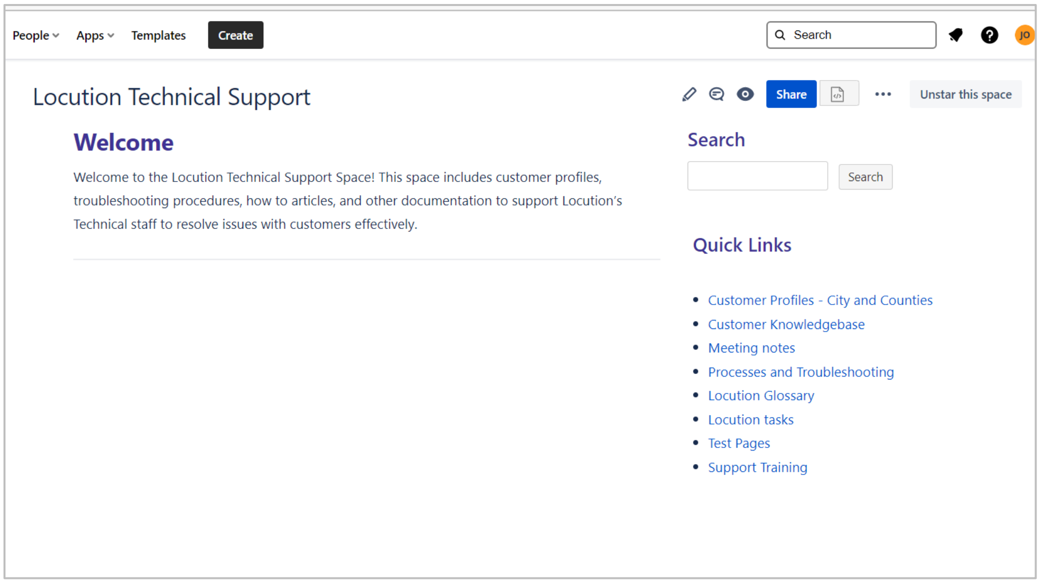
From 2017 to 2024, I worked with Locution on a retainer basis to plan, create, edit, and deliver online help, user guides, release notes, proposals, and other support documentation across Locution's suite of products.

As part of this engagement, I worked with the startup's founder and president to understand their products, user requirements and information needs. I revised existing documentation so that it was focused on the user and the tasks the user needs to accomplish, instead of the existing documentation that led with the functionalities and features of the products. Additionally, I reworked the graphics in the documents to show more visual context for the users to understand how to accomplish a task or assess what they needed to do within an application.

- Audited the existing documentation to assess what Locution had already documented.
- Analyzed the existing documentation, revised the content into 'tasked based' short articles. After the content was revised, I migrated the information into an Atlassian Confluence library that I created with new article templates.
- Scoped, planned, and created documentation for the products and/or services Locution offered that did not have supporting documents and/or training materials.
- Standardized and revised release notes from the software engineers. I made the release notes more visually appealing and revised the content so that a user who was not an engineer could understand. Created a library of release notes in Confluence for staff to access and reference as they needed it.

Impact

- Through collaboration with Locution, 250+ online help topics rewritten, standardized, and validated.
- Technical user guides, release notes, and videos have cut down on support calls and time to support users with their questions.
- New technical support staff were able to onboard more quickly and provide support to customers more effectively.



Online Help Article Example

Installing PrimeAlert® Dispatcher on a PC

The following information outlines the process to download and install PrimeAlert Dispatcher on a PC.

1. Log on to the Locution FTP site (https://support.locution.com/thinclient/) with the credentials provided by Locution.

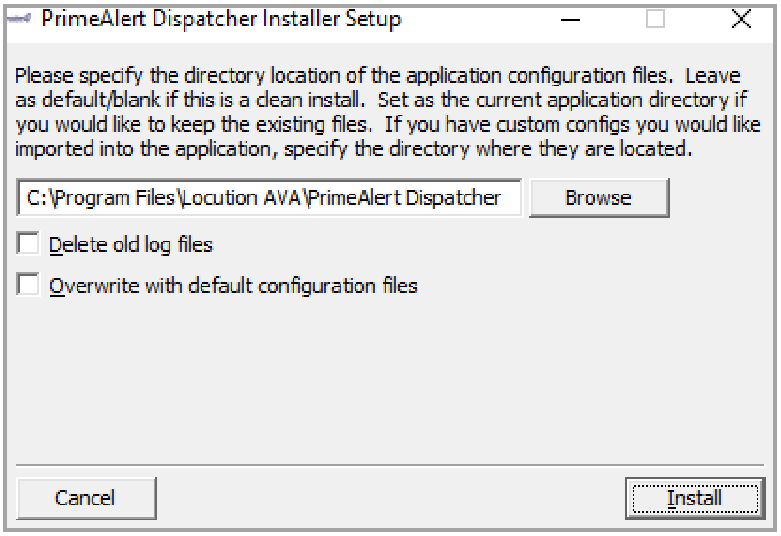
   Note: If you do not have this information available or if you no longer remember your credentials, send an email to techsupport@locution.com and someone will get back to you with your credentials.

2. Navigate to the **PrimeAlert Dispatcher** folder (*ex*. PrimeAlertDispatcher-5.12.0.00*xx*.exe) and download the executable file.

3. If Windows protects your PC, a prompt opens, click **Run anyway**.

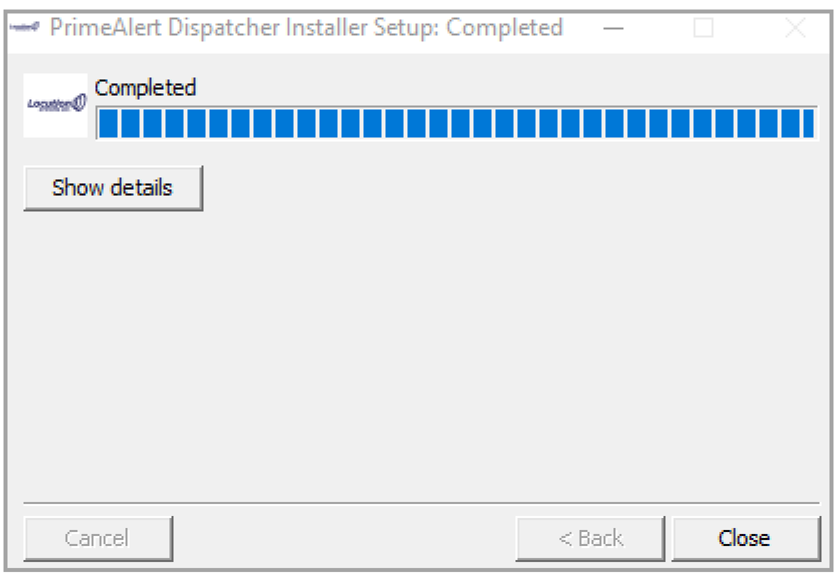
4. Run the executable.

   The PrimeAlert Dispatcher Installer Setup window appears.



5. Install the software with the default directory settings and click **Install**.

   The PrimeAlert Dispatcher Installer Setup: Completed window appears.

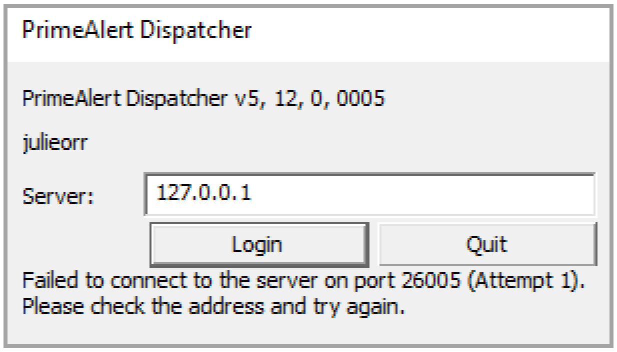


6. Click **Close**.

7. Navigate to "**C:\Program Files\Locution AVA\PrimeAlert Dispatcher**" and open the application.

   Note: You can create a shortcut to the application on your desktop: right-click on **PrimeAlert Dispatcher** > **Send to** > **Desktop** (create shortcut).

   After opening the application, the Login prompt appears.



8. Type the **IP address of PrimeAlert Administrator** and click **Login**.

   PrimeAlert Dispatcher opens.

User Guides

Context

Locution Systems, Inc. builds custom fire station alerting solutions for state and municipal public fire stations. The company's communication center solutions are built to maximize fire station performance efficiencies so that first responders time can respond to emergencies quickly and safely.

Problem

As a startup, Locution develops and provides a suite of software, hardware, and accessory products for state and municipal public fire stations to automate fire station alerting, which improves response times, reduces call stacking, and minimizes first responders' stress. Although Locution products are well-received by fire stations around the country and Canada, their customers rely heavily on Locution's Customer Support staff to help them with configuring the technology and/or troubleshooting issues. Although the company likes having direct and consistent contact with their customers, Locution needed a dedicated Technical Writer to refine and/or create end user documentation to supplement the support customers were receiving through the Customer Support team and the training staff.

Contribution

From 2017 to 2024, I worked with Locution on a retainer basis to plan, create, edit, and deliver online help, user guides, release notes, proposals, and other support documentation across Locution's suite of products.

As part of this engagement, I worked with the startup's founder and president to understand their products, user requirements, and information needs. The following examples highlight two of the user guides that I developed while engaged with Locution. At the time I started helping Locution, they did not use any specific templates. Marketing materials and technical documentation did not converge on look or branding. Additionally, the technical documentation was primarily written by the founder and/or engineers when they had extra time. The following two examples illustrate my efforts to incorporate the 'feel' of the marketing material by using the same messaging themes, fonts, and header and logo as the marketing material. Additionally, the technical documentation appears more approachable. The font size is readable, there is more white space, and there is a more obvious informational hierarchy and structure to the content. The first example was for a new product offering the company launched called PrimeAlert® Responder Mobile.

Locution did not have any user documentation to support the new map app, which provides at-a-glance dispatch and mapping information. I created the concept of a quick start user guide that focused on the most common tasks first responders could do with the app, as well as providing a few easy-to-understand images that accompanied the instructions. The second example for radio backup options for the PrimeAlert® Fire Station Alerting System, I revised from an existing document that was written by an engineer and focused on the system versus the user's needs and perspective. Tools used: Adobe Photoshop, Adobe InDesign, Adobe Acrobat, and Microsoft Word.

Impact

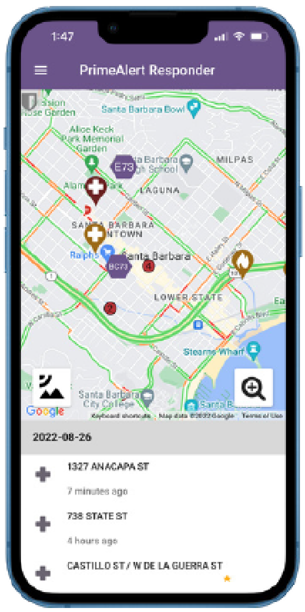
- Early adoption of the mobile map app - The PrimeAlert® Responder Mobile app quick start guide offered just enough information to entice state and municipal fire departments to adopt the solution as part of the products they purchased from Locution.
- Reduced time to value - For fire departments that had already purchased PrimeAlert Responder Mobile app, the quick start guide allowed users to use the new product more quickly and with less frustration and/or need to contact the support team to answer questions.
- Clarified advantages of solutions' capabilities – The original radio backup options guide had a lot of useful information that engineers and technical owners could appreciate, however, the documentation needed to be revised so that people could read the content easily and not get confused by unnecessary complexities in wording and/or document formatting.

Example 1:

Locution SYSTEMS INC.

PrimeAlert® Responder Mobile

Set-up and Quick Start User Guide



This guide will help you quickly set up and use PrimeAlert® Responder Mobile. With this Fire-EMS maps and dispatch app you will get at-a-glance current and previous dispatch information, mapping, and satellite views of the incident. The app is available for iOS and Android devices.

Overview

The PrimeAlert® Responder Mobile app extends the power of PrimeAlert®, a powerful, flexible, and configurable automated Fire-EMS alerting system. The mobile app provides at-a-glance dispatch and mapping information. An intuitive swipe interface quickly transitions between the latest, and prior dispatches. One-touch serves up driving directions to the dispatch location. Prior dispatches display one-by-one and is searchable by multiple fields. The app is available for iOS and Andriod devices.

How it works

PrimeAlert® Responder Mobile interfaces with the agency's Computer-Aided Dispatch (CAD) system and sends at-a-glance dispatch notifications to authorized personnel via their smartphones and tablets. The app alerts personnel as individuals or groups (e.g., stations, battalions, districts, etc.) wherever they are, making it useful for volunteer and reserve first responders. The mobile alert shows incident dispatch details and location map in street or satellite views, and allows users to search and retrieve previous notifications for future reference.

Four steps to set up

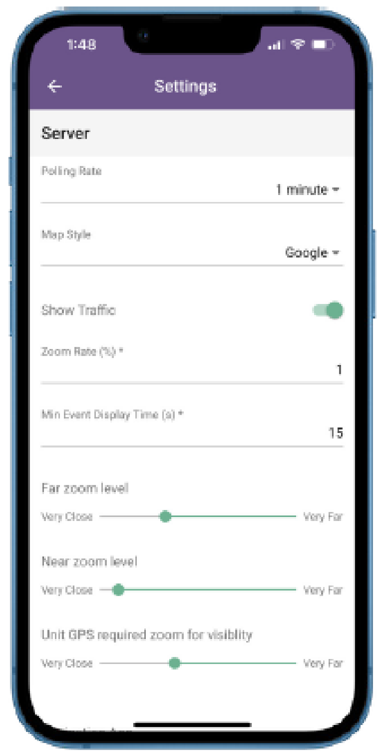
1. Request access
2. Install the app on your mobile device
3. Log in to the app
4. Configure the app

Step 1: Request access

To request access to PrimeAlert® Responder Mobile, please contact your agency's fire station alerting System Administrator to find out what email address to use for your authentication. Log in credentials are required, and only available for PrimeAlert® Administrator and/or PrimeAlert® Station Manager customers.

After you know the email to use, go to Step 2 for directions on installing the app.

Server settings:



Polling Rate (M) While on duty you will get push notifications (automatic dispatch alerts) about new events. In the event network connectivity fails, poll rate acts as a backup. This field allows you to set the amount of time for the server to alert you about new dispatch data. The default is set to 1 minute. Note: The station version of PrimeAlert® Responder does not go offline and will receive notifications regularly even if the mobile version connection fails.

Map Style: Choose the map style you prefer—use the satellite image to see a current global satellite and aerial imagery, or the map view, which displays a comprehensive, general-purpose map with accurate, legible styling of road and transit networks.

Show Traffic: If you want to view (or not view) traffic flow to an incident, you can turn the Show Traffic setting on and off by tapping the toggle. When the toggle is to the right and changes to green, the setting is on. To turn off the Show Traffic setting, tap the toggle again, and the setting will turn gray with the toggle positioned to the left.

Far, Near, and Unit GPS zoom levels: Set your far, near, and Unit GPS zoom levels to view incident location and traffic details according to your preferences. When you change the zoom levels details about location and traffic become more or less visible.

Example 2:

Locution PrimeAlert Radio Backup

Locution SYSTEMS INC.

Radio Backup Options for PrimeAlert® Fire Station Alerting System

Revision A.3

Locution Systems, Inc.
1626 Cole Blvd., Suite 250
Golden, CO 80401
(303) 301-7300
www.locution.com

Locution Systems ©2021 | PrimeAlert® Product Family | v.A.3 | 2021-16-03 | www.locution.com | 1

Locution SYSTEMS INC.

Section 2: Integrating the PrimeAlert® Fire Station Alerting System with a fire station radio

Locution integrates the PrimeAlert® Fire Station Alerting system with a fire station radio using the Locution RIA30 Station Radio Interface. The RIA30 Station Radio Interface is used as the point of demarcation between the Locution PrimeAlert® Fire Station Alerting system equipment and the fire station radio. Originally, radio installers supplied their own custom assemblies, which provided similar functions to those the RIA30 interface currently supplies. In designing the PrimeAlert® RIA30 interface, Locution standardized the required station radio interface both in terms of function and ease of implementation. The RIA30 Interface provides the following functions:

- **Amplifies and buffers low level radio discriminator audio**. "Discriminator" audio is the term generally used by radio manufacturers to define a radio audio output that is fixed and not affected by any manipulation of the built-in radio volume control or speaker. It is also assumed that the radio channel audio has *continuous* channel traffic present and is not selectively suppressed by any individual radio programming.

- **Provides relay contact closures** in relation to required radio and Locution PrimeAlert® functions.

- **Provides provision for a dual power supply feed** to ensure backup radio audio as long as either the radio or Locution PrimeAlert® cabinet has power.

- **Supplies a standard Locution PrimeAlert® Fire Station Alerting system assembly box**. The box can be conveniently located with the radio up to 300 ft. away from the PrimeAlert® Fire Station Alerting system cabinet.

Figure 1 is an RIA30 Interface schematic diagram showing the required radio interface Accessory Plug connection for the Motorola XTL/APX series of base radios.

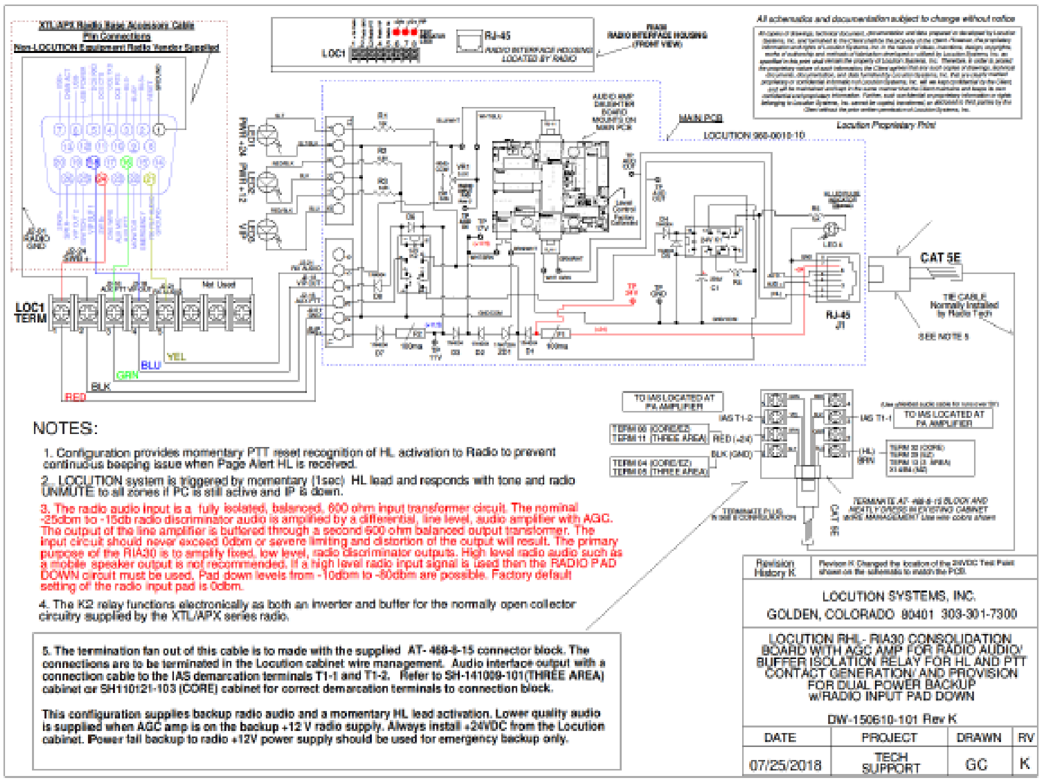


Figure 1: RIA30 schematic showing the required radio interface plug connection for the Motorola XTL/APX series of base radios.

A qualified radio technician must assemble and install a radio accessory cable to the RIA30 Interface. While the schematic above (Figure 1) shows a Motorola radio connection, as that is the most common connection, the interface may be adapted to Harris and other radio system models.

The radio technician will need to understand the RIA30 Interface terminal connections. The terminal connections are:

Example 3:

Context

Pearson Higher Education is a global leader in providing higher education institutions with world-renowned content and digital platforms that support educators with a wide range of products and services for teachers and trainers.

Problem

Pearson had been conducting several internal training sessions with their executive directors, sales leaders and support staff, finance teams, and operations support on the processes and workflows for formulating complex strategic sales deals, documents required, and the approval streams. However, they did not have a formal guide documented for all stakeholders to refer to after the training sessions.

Contribution

From 2012 to 2017, I contracted with Pearson as a Technical Writer, Proposal Manager, and Grant Services Marketing Lead. As part of my work, I collaborated with the Manager of Sales Operations to create a user guide on the strategic partnership deal formulation and approval process. Although the Sales Operations Manager was available to answer my questions and provide information, I mostly relied on training materials and interviews with subject matter experts (SMEs) to put a user guide together, which illustrated the complete process from end-to-end for executive directors, sales leaders and support staff, finance teams, and operations support. Tools used: Adobe Photoshop, Adobe Acrobat, and Microsoft Word.

Impact

The guide helped Pearson in several ways:

- It provided the sales teams with a structured, consistent, and scalable playbook for how to formulate deals, execute on the deals, and avoid bottlenecks in moving a sale through the sale cycle more quickly.
- The guide also helped the finance team to build better forecasting projections by having transparency into what deals were being developed and/or were close to closing.
- The guide also helped Pearson to reduce the sales cycle length by providing clearly defined steps in the processes and approval workflows.

Strategic Partnership Deal Approval Process User Instruction Guide

For Internal Use Only

ALWAYS LEARNING

PEARSON

Introduction

This guide contains instructions for the Strategic Partnership Deal Approval Process for traditional institutions higher education. Specifically, this guide will address the deal formulation, documentation and approval processes f an integrated deal. The document is intended to be used by Executive Directors, Sales Support, Finance, and oth key stakeholders.

Why read this guide?

Strategic Partnership deals involve a wide-range of complex deal components, stakeholders and processes. As result of the complexities associated with a Strategic Partnership Deal, this guide instructs opportunity owners ar stakeholders about how the Strategic Deal Approval Process flows, how to formulate a strategic deal, and tl documents and approval routing necessary to facilitate an opportunity from beginning to a successful contract.

This guide can be read in part or whole depending on your needs. If you require assistance during the deal approval process please contact Aaron Culbertson 303-658-1090, Jeff Petrin 716-671-2052, or Kris Medina 303-658-1342.

What Is an Integrated Deal?

Pearson is a learning company that delivers partnership, innovation, and results. Instead of trying to make one product or service fit all partners, integrated deals create opportunities for Pearson to engage in more effective partnerships with institutions; giving them products and services that are sustainable over the long term and that are cost-effective for both Pearson and our partners. An integrated deal is any multi-product/service deal combining elements such as custom content (MyLab products, books, Course Connect), course development, tutoring, internal software/platform solutions (Learning Studio, Open Class, Equella, Learning Outcome Manager/Enterprise Reporting), third party software and related professional services (build, train, convert, implement, integrations).

LearningStudio	Additional Pearson Products	Pearson Services	Third Party Add-Ons
eCourse & eCompanion platform/hosting	MyLabs/Mastering	Instructional Design	Smarter Measure
Enterprise Reporting	OpenClass	Course Development	Identity Verification
Learning Outcomes Manager	eBooks/Textbooks	Curriculum Services	Watchitoo Video Conferencing
Web Services On-Demand	Equella	Media Services	Turnitin Dropbox Integration
Mobile – Native Apps & mSite	Icodeon	Smarthinking	Panopto Lecture Capture
Data Analytics	Propero	Professional Services TC, ATC, Course Svcs.	VoiceThread
Exam Guard	Pearson Instructor Education / EDU101	Innovation Partners Program	Knewton Math Readiness
ClassLive Pro	Course Connect		Evaluation Kit
	MyCourseTools		

Integrated Pearson Offerings

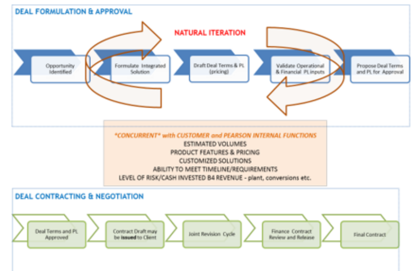
Process Internal Stakeholders

The internal stakeholders in a Strategic Partnership Deal include Course and Content Delivery experts, Executive staff, Finance, Legal, Project Managers, Sales/Business Development, Service Delivery, and Strategic Account Management. Key stakeholders in an integrated deal provide information *and* receive information in order to create, develop, approve, and move an opportunity to closed won to be executed and delivered to a Pearson Partner.

How the Strategic Partnership Deal Approval Process Works

For every Strategic Partnership Deal, Executive leadership assesses if Pearson has the risk tolerance potential for success and the right solution set necessary to execute and deliver an opportunity. After an opportunity is identified, an opportunity owner in conjunction with key internal stakeholders, goes through an iterative process of formulating, proposing and drafting terms, validating operational and financial inputs, and then proposing deal solution and terms for approval by Executive, Financial and Legal leadership. A Strategic Partnership Deal process assesses estimated volumes, product features and pricing, customized solutions and Pearson's ability to meet the proposed timeline and requirements. The approval criteria also consider level of risk and cash invested before revenue. Once a deal is reviewed by Executive, Financial, and Legal leadership contract terms and negotiations ensue before a final contract is signed by Pearson and a Strategic Partner.

The *new* Strategic Partnership Deal Approval Process goes through Salesforce.com as it always has for creating and maintaining opportunities and schedule of authority approval. To enhance the current process, we are now integrating Salesforce with Box. Box is a file sharing system and repository that is cloud based. Box allows us to create documents that can be shared across multiple teams. We've recently standardized the two documents you will need for every strategic deal—the Deal Profit and Loss (P&L) Workbook and the Executive Summary Narrative. Each template resides in Box. The Box environment provides security while allowing access to collaborators to the deal documents; only the people who are involved in formulating a deal and approving an opportunity may work with the documents. Box also provides a workspace to communicate, collaborate, and assign tasks so that the approval process can be expedited. This process is more efficient in turning an opportunity into a contract. The final documents will reside in Box and be accessible through the opportunity in Salesforce.



Overview of the Strategic Deal Approval process

The full deal process flow requires you to:

Step 1: Create an opportunity in Salesforce and initiate the secure connection with Box

Step 2: Formulate the Strategic Partnership opportunity

Step 3: Develop an Executive Summary Narrative document

Step 4: Develop the Deal Profit and Loss (P&L) Workbook

Step 5: Manage documents in Box and collaborate with stakeholders

Step 6: Submit opportunity in Salesforce for Schedule of Authority approval routing

Step 7: Go to contract once a Strategic Partnership deal is approved

Deal Approval Process Flow

Step 1: Create an Opportunity in Salesforce and Initiate a Secure Box Connection

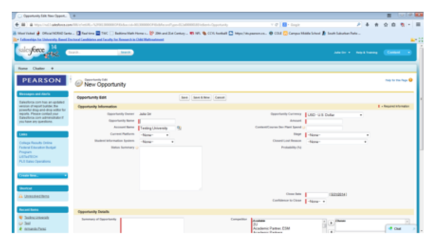
The opportunity owner must first create a 'new opportunity' in Salesforce before they access and work with the documents in Box. Other sales functions like pipeline reporting and recording sales activity for deals will be done in the Salesforce environment. When the documentation and approvals associated with the deal are final, the files are moved to the appropriate folder in Box and will be accessible through the opportunity in Salesforce.

The web address for Salesforce is https://login.salesforce.com/. You can access Salesforce outside of the Pearson network as long as you have access to the web. Contact Kris Medina for your credentials. The opportunity owner, usually the Executive Director, creates an opportunity in Salesforce.

Create an Opportunity

From Salesforce Home page:

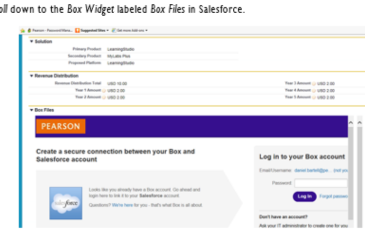
1. *Click* in the **Search** field to search for the opportunity's account (*Example: University of Alabama*). *Select* the correct account.
2. From the **account object**, *scroll* down to the Opportunities section. Create a new opportunity by clicking on **New Opportunity**, or *select* from the opportunities listed if it is not a new opportunity.
   a. **Opportunity naming convention**:
      1. Institution name (abbreviated),
      2. Brief description of solution, and
      3) Year (the year it will close)
      Example: Univ. of Alabama Online Learning 2014
3. *Populate* all required fields for the opportunity, signified with a red horizontal bar in the field prompts and *click* **Save** at the top or bottom of the page. If required fields are not populated, you will not be able to save the opportunity. After the opportunity has been created, *scroll* down the page to the Box widget (Box section) to initiate a secure connection.



Initiate a secure connection to Box

From the Opportunity page in Salesforce:

1. *Scroll* down to the *Box Widget* labeled *Box Files* in Salesforce.



2. From the **Box Log-in** dialog field, *type* your email username and password log-in credentials.
   You will be redirected to My CLOUD to log-in.
3. From **My CLOUD log-in** *type* your username and password log-in credentials.
   A confirmation that a secure connection with Box will be displayed and your view of the Box widget will appear as below:

Grant Related Examples

Example 1:

Context

The Rucks Group, LLC (TRG) is a research and evaluation firm that gathers, analyzes, and interprets data to enable their clients to measure the impact of their grant-funded work.

Problem

Universities and colleges who receive grand funding typically need to provide the funding organization with annual reports that demonstrate how their projects are performing with the grant funds that they have received. As part of their work, TRG consults and supports institutions of higher learning by gathering, analyzing, and interpreting data related to the grant funded projects. The Rucks Group needed a ghost writer to write and edit a series of evaluation reports for five of their educational partners who needed to provide an annual report on their grant-funded projects to federal government agencies.

Contribution

I contracted as an independent Technical Writing Consultant with The Rucks Group from November 1, 2021, to February 28, 2022, to write and edit five grant evaluation reports. I worked with the President of The Rucks Group and a Senior Project Manager to understand the evaluation reports' purposes and identify and gather the data and source materials for the reports. I wrote and edited the evaluation reports and provided the final versions that were then sent to The Rucks Group's university and college partners.

Impact

The grant-funded evaluation reports positively impacted The Rucks Group's relationships with the universities and colleges that they partnered with to develop the reports. The company's oversight, in-depth analysis, and ability to develop the evaluation reports for the institutions is imperative for continuing their agreements with these institutions. The reports that I developed for The Rucks Group were developed professionally, intentionally, and within the timelines that were established prior to my engagement with the company.

The grant-funded evaluation reports provided the institutions of higher education with the vital information that they were required to provide to the federal government. The reports accounted for how the federal government's money was spent, the impacts the grant funds were having for the students, programs, and schools. The reports provided the federal government with a snapshot of how their money was being used to produce critical results for some of the most critical workforce issues that our nation faces.

Sample excerpt from the report

Executive Summary

Background

To address the growing need for cybersecurity professionals within government agencies, the National Science Foundation's Scholarship for Service (SFS), Advanced Technical Education, and Scholarships in STEM programs co-funded three grants for community colleges to deliver SFS on their campuses. This program is unique, in that community colleges will offer terminal associate's degrees to Scholars in information technology fields to enter a Federal, State, local, or tribal government position related to cybersecurity upon program completion. Additionally, community colleges became the fiduciary agents in implementing the grant, whereas four-year universities managed SFS in the past.

This pilot program, SFS Community College Cyber Pilot (SFS C3P), features three distinct models (Figure 1); this report details evaluation findings from the Collaborative + Lead (C+L C3P) model. The three colleges participating in this model are Sinclair Community College (acting as the Lead), Brookdale Community College, and Moraine Valley Community College.

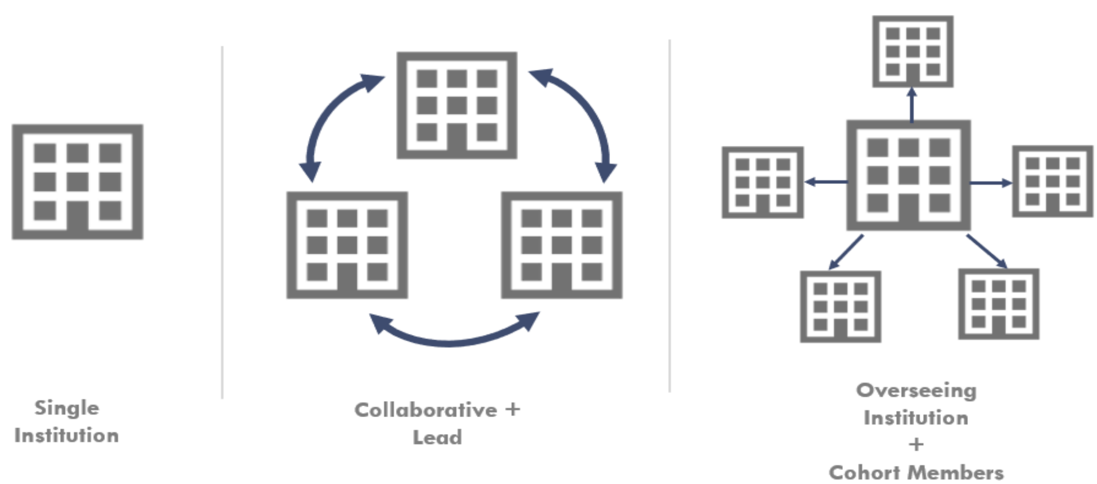


Figure 1. SFS C3P conceptualization of three funded project models.

The specific objectives of C+L C3P are: 1) research, develop, and document new strategic roles that community colleges can play in increasing the number of cybersecurity professionals employed in government sectors; 2) build effective collaborations between educational institutions, business, industry, and government; 3) prepare 24 Scholars for Service to help meet government need for highly qualified cybersecurity professionals; and 4) disseminate best practice models designed for replication by other colleges across the country. Scholars in this program are to be veterans of the Armed Services and/or have at least a bachelor's degree in a non-cybersecurity field.

Overview of the Evaluative Approach

The Rucks Group, LLC (see Appendix B for author biographies) served as the external evaluator for C+L C3P. Working in collaboration with the project team, The Rucks Group articulated an evaluation plan to address the overarching question of the efficacy of this pilot program at a multi-site implementation of SFS on community college campuses. The evaluation questions centered around six themes: 1) successes and challenges of program implementation; 2) strengthening collaborations; 3) effectiveness of recruitment, onboarding, and retaining of Scholars; 4) characteristics of successful Scholars; 5) obtainment of jobs at the end of the program; and 6) dissemination of project findings. Evaluation findings utilized a mixed-method approach that included document review and interviews with the project team at the end of Year 2 to address all questions.

Findings

Evaluative Question #1: How effectively is the project being implemented at each partner institution? What are the challenges that are being experienced?

During Year 3 (September 1, 2020 – August 31, 2021), the project team made progress on all intended activities. The main focus was on onboarding and supporting Scholars through various activities, which prepared them for a summer internship or post-graduation employment, even though there were some challenges in getting Scholars placed. Because many agencies continued to reject Scholars without a bachelor's degree for an internship or employment, both cohorts have expressed feelings of dejection and frustration with the search process.

Evaluative Question #2: To what extent were the collaborations among partnering institutions, industry, and government strengthened?

The project team has successfully maintained and strengthened collaborations at multiple levels to support Scholars through the C+L C3P model in Year 3. PIs maintained relationships with on-campus offices and individuals to continue delivering the program. Additionally, collaborations between partnering institutions were strengthened within the C+L C3P model and those comprising the other SFS C3P models. Finally, the project team expanded on partnerships with government entities to establish potential internship and employment opportunities for both cohorts.

Evaluative Question #3: How effectively is each partnering institution recruiting, onboarding, and retaining non-cybersecurity bachelor's degree and veteran students? What best practices are emerging?

In Year 3, most Scholars in Cohort 2 attended an onboarding activity; survey findings indicated that participating in this activity increased their knowledge of program requirements and self-efficacy in obtaining work in the field. Scholars in both cohorts participated in many activities during the year to promote their retention in the program and respective institution. Scholars were most satisfied with their institution's academic programs, advisor or Coach at their institution hired through this grant, and extracurriculars they participated in, including campus clubs and cybersecurity competitions. Additionally, Scholars have noted that they appreciate all opportunities to speak with government representatives who can explain their opportunities to pursue. All Cohort 1 Scholars were successfully retained and completed their academic and C+L C3P programs.

Evaluative Question #4: What characteristics emerge of successful students in the program?

By the end of Year 3, all Scholars from whom data were collected were in good academic standing and perceived themselves to have many of the desirable traits and attitudes that employers seek. There were some changes to Scholars' self-perceptions from the beginning to the end of the year. Overall, Scholars felt a greater sense of managing their time, openness to seeking support, adaptability to change, eagerness to learn new skills, and persevering despite challenges.

Evaluative Question #5: To what extent are Scholars obtaining jobs? Obtaining government jobs?

All ten Cohort 1 Scholars completed a summer internship experience in 2020; overall, Scholars perceived their experiences as valuable. Additionally, supervisors who responded to a survey highly regarded the interns' preparation and performance in their roles. As of early Summer 2021, one Scholar in this cohort had started an eligible position with an executive agency. Three Scholars were in the security clearance process for qualified jobs, and the remaining six were still searching for employment related to this program. Only two Scholars in Cohort 2 were still searching for an internship in early Summer 2021; data regarding their experiences will be included in the next report.

Evaluative Question #6: How are the project and related evaluation findings being shared with other community colleges across the country?

The project team disseminated information about the development and implementation of this model with a community college aiming to create a new SFS program; the project team is identifying other opportunities to present findings and best practices at future conferences, which will take place in the NCE year.

Recommendations

This report includes recommendations for the project team as they continue into the NCE year. These include suggestions for emphasizing the importance of continued networking, facilitating socialization for Cohort 2, finding ways to accelerate veterans' obtainment of bachelor's degrees, and continuing to advocate for SFS C3P to NSF and OPM.

Example 2 and 3:

Context

Pearson Higher Education is a global leader in providing higher education institutions with world-renowned content and digital platforms that support educators with a wide range of products and services for teachers and trainers.

Problem

The Pearson Higher Education Operations Manager wanted to create a Grant Support and Services area that would provide universities and colleges, and workforce development organizations with information about federal, state, and private grants that would help them fund their enterprise-level educational goals and projects. They needed a dedicated resource to lead this new effort and strategize channels of communication that would establish Pearson as a thought leader in grant-related services.

Contribution

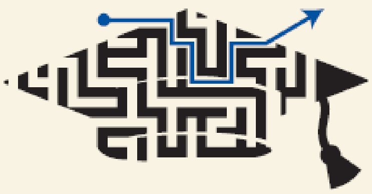
From 2012 to 2017, I contracted with Pearson as a Technical Writer, Proposal Manager, and Grant Services Marketing Lead. As part of this engagement, I strategized how we could develop grant support services that would assist universities and colleges, and workforce institutions to find the grants that would support their projects. I also created blog content, marketing and web content, training, and sample grant narrative that provided guidance and/or tips for applying for grants.

Impact

The grant materials contributed in several ways:

- The materials provided funding options for colleges to support enterprise-level projects that aligned with Pearson's learning platforms and content.
- The content established Pearson as a thought leader with expertise and insight into what their institutional partners were experiencing and needing. The content helped to build trust with their current and prospective clients.
- The grant sample narratives and grant training helped colleges and universities prepare their grant applications and showcase their project ideas to federal, state, and private organizations that had grant funds available for distribution.

Funding Ideas for Student Success: Grant Support from Pearson



How Pearson Can Help

Our grant specialists are here to:

1. Help you define your goals and objectives.
2. Assist you in identifying the products and solutions that best support your goals.
3. Work with you to establish a framework for tracking and measuring your outcomes.
4. Review grant proposals and suggest ways to strengthen them.

Take the First Steps toward Funding Your Big Idea

Colleges and universities face significant challenges in ensuring learners are prepared with the knowledge, skills, and capabilities they'll need to stay the course to graduation. The Pearson Higher Education Grants Team can assist your institution in finding the funding you need to start, sustain, and grow student success programs to support your students from enrollment to completion. Our team of grant specialists can provide resources and support—from helping you identify funding options to providing grant writing guidance and tips—at no charge to help you pursue and secure funding for student success projects that include Pearson programs and services.

Explore these Grant Funding Options

U.S. Department of Education (DOE)
Improvement of Post-Secondary Education Grants

First in the World (FITW) Program
The purpose of this program is to stimulate innovative strategies and practices to improve college completion and make college more affordable for students and families.
Learn more at http://www2.ed.gov/programs/fitw/index.html.

Title III Part A: Strengthening Institutions Program
The purpose of this program is to build institutional capacity to serve minority and low-income students. Funds can be used to improve and strengthen the academic quality, institutional management, and fiscal stability of eligible institutions.
Learn more at http://www2.ed.gov/programs/iduestitle3a/index.html.

Title V: Developing Hispanic Serving Institutions Program (DHSI)
This grant assists Hispanic Serving Institutions (HSIs) in developing and enhancing their academic offerings, program quality, and institutional stability in order to build opportunity and improve attainment for Hispanic students. The program may be used for academic tutoring or counseling programs, administrative management, distance learning, academic instruction, teacher education, and student support services.
Learn more at http://www2.ed.gov/programs/idueshsi/index.html.

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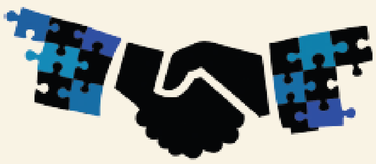


4 Tips for a Convincing Grant Proposal

1. Name your project something memorable that will stand out to a granting entity.
2. Use a grant application as a roadmap for the elements you must include, plan, or implement in the proposed project.
3. Clearly define your problem. Grant evaluators want to make sure that your problem is well defined. The problems you face daily in your classroom with your students are often the best "opportunities" for grant rationales.
4. Establish a clear method for capturing and tracking how your project will benefit your target students, programs, etc. Grant reviewers want to be assured that outcomes and goals will be evaluated properly.

Learn more about how Pearson Higher Education Grant Services can help you start, grow, and sustain your student success programs at pearsoned.com/grant-help

U.S. Department of Education Federal Outreach and Student Services Grants

TRIO Programs (eight programs)
These Federal outreach and student services programs are designed to identify and provide services to help individuals from disadvantaged backgrounds—including low-income individuals, first generation college students, and learners with disabilities—progress from middle school to postbaccalaureate programs. Types of projects under the TRIO programs target tutoring, counseling, mentoring, and other student support services.
Learn more at http://www2.ed.gov/about/offices/list/ope/trio/index.html.

Foundation Funding

The Bill & Melinda Gates Foundation (Gates Foundation)
The Gates Foundation sporadically funds higher education projects. In 2014, the foundation launched a $35 million grant to "boost community college graduation rates."
Learn more at www.gatesfoundation.org.

The Lumina Foundation
The Lumina foundation mainly funds partnerships that they have started. However, Lumina does grant small amounts of funds for unsolicited grant applications and for challenge grants.
Learn more at www.luminafoundation.org/grants.html.

Resources for Finding Funding Support

Grants.gov
Grants.gov allows organizations to electronically find and apply for more than $400 billion in federal grants. Grants.gov is the single access point for over 1,000 grant programs offered by federal grant-making agencies. The searchable database allows users to search for grant opportunities by category or government agency. Grant applications can be downloaded and submitted online through the website.
Learn more at www.grants.gov.

The Foundation Center
This comprehensive resource includes a grant writing tutorial, a common grant application form, a Foundation Finder database with information on more than 73,000 private and community foundations in the United States, links to grant maker websites, and an online version of The Foundation Directory.
Learn more at www.fdncenter.org.

Grants Resource Center (GRC)
The Grants Resource Center provides a searchable database of public and private funding sources, provided by the American Association of State Colleges and Universities. The database is designed exclusively for GRC-member institutions.
Learn more at www.aascu.org/grc.

ALWAYS LEARNING PEARSON

Sample Grant Narrative

For EQUELLA

Pearson Higher Education Grant Services
Pearson Education
HigherEdGrantexperts@pearson.com

Pearson Education| 2154 E. Commons Avenue, Suite 2000 | Centennial, CO 80122

ALWAYS LEARNING

PEARSON

TABLE OF CONTENTS

HOW TO USE THIS SAMPLE NARRATIVE

What is the purpose of the sample narrative?

A sample narrative is a resource designed to assist you in the grant-writing process. It is intended to stand as a companion to the Request for Proposal. The Pearson EQUELLA solution and summaries in this document will provide you with ideas for how you might structure your response.

How do I use the sample narrative?

The Pearson EQUELLA Sample Narrative should be thought of as a model. It provides implementation ideas, especially for how the Pearson EQUELLA solution will address a grant requirement. However, because your institution's needs and project vision are unique, you should customize the summary solutions to reflect your specific plans. Use this document as you need: you may choose to read the entire document, or if you are stuck on a certain section you may choose to turn there first.

Can I cut and paste from this document?

You may cut and paste small sections as needed. However, your project has the best chance of being funded if it is customized to your institution's unique needs. Use the narrative as a resource, not as a final product. As you use the narrative, revise it to reflect your unique needs, project goals, and coordinating programs.

For what stage in the grant-writing process is the sample narrative intended?

Effective grant writing and planning involves several stages. This sample narrative packet can be used as a resource during several stages, such as gathering information, writing the narrative, and completing the application.

What are the callout boxes for?

Callout boxes throughout the document will provide further guidance and suggestions. Be sure to read the callout boxes, as they will refer to page numbers in the Planning Guide, provide online resources you may wish to refer to, and give tips or additional instructions for further customization.

What does <u>*underlined, italicized*</u> text signify?

Underlined, italicized text throughout the document serves as a placeholder and shows generalized text. This generalized text reflects the need to customize your narrative: elaborate on these areas and be sure to customize as much as possible.

What does *italicized* text signify?

SAMPLE PROPOSAL NARRATIVE

This sample narrative aligns with generic grant requirements for a digital repository using Pearson EQUELLA to align with a grant proposal. Be certain to customize your response to your specific grant application.

EQUELLA is a digital repository that provides one system to house your teaching and learning, research, media and library content. EQUELLA has been deployed for copyright resource collections, research materials, managing and exposing materials through web sites and portals, content authoring, workflow, institutional policy and document management. EQUELLA is currently in use in a wide range of schools, districts, universities, community colleges, state systems and departments of education, government agencies, and corporations worldwide.

1. NEEDS ASSESSMENT

Take a closer look: The needs statement

The needs statement serves as your introduction to institution, program, your students and faculty, and the grant project you are proposing. The needs statement below models best practices; you must customize your statement to highlight the unique characteristics of your institution, program, students, and staff. Emphasize needs that make your institution's program standout and that justify your proposed grant project. See pp. 13-15 of the Planning Guide for further tips on developing your needs statement.

Example 4:

Context

Achieve3000® (sold to McGraw Hill in 2021) is the leading literacy platform in today's blended learning programs, with cloud-based solutions that serve nearly three million students worldwide. Based on decades of scientific research, Achieve3000's patented and proven differentiated instruction for grades PreK-12 and adult education reaches all students at their individual reading levels to accelerate learning, improve high stakes test performance, and drive college and career success.

Problem

The Director of Proposal Services needed someone to create grant sample narratives for federal and state grant applications that would help Achieve3000 K – 12 schools apply for grants that could fund the schools and help them purchase Achieve3000 cloud-based educational content.

Contribution

From August 2017 to March 2020, I contracted with Achieve3000 as a Technical Writer and Proposal Editor. As part of this engagement, I created grant sample narratives that provided grant application content to K-12 schools who were applying for specific federal and state grants. The sample narratives suggested ways that the school could develop their applications that would align with Achieve3000 products without specifically mentioning Achieve3000.

Impact

The grant materials contributed in several ways:

- The grant sample narratives helped K – 12 schools with effective and persuasive application content that clearly stated the schools' needs, outlined measurable outcomes, and directly aligned the schools' projects with the grant funders' funding objectives.
- Achieve3000's grant sample narratives provided their K – 12 educational clients with practical support, which established Achieve3000 as a trustworthy partner and built more long-lasting relationships with their clients.

Sample Language for the

Georgia Department of Education Literacy for Learning, Living and Leading (L4GA) Grant

The sample language provided in this document is intended to support schools interested in submitting Georgia Department of Education Literacy for Learning, Living and Leading in Georgia (L4GA) Grant Applications that include **Achieve3000 literacy solutions**. This is meant to be a guide, we recommend schools tailor the language to your specific goals and needs.

Local Education Agency (LEA)-Partnership Narrative (to be completed by LEA- Community Literacy Task Force) 15 points

[Achieve3000 recommends SCHOOL include background on the SCHOOL system, the demographics of the system, your current priorities, your plans, and current management structure. Additionally, detail the instructional initiatives your system has implemented related to literacy, and your current literacy curriculum. Include national, local, and/or system data that shows a need for this specific L4GA grant.]

LEA-Partnership Management Plan and Key Personnel (to be completed by LEA- Community Literacy Task Force) 10 points

[SCHOOL should address, as applicable. The following is an example of how you could structure the response.]

The L4GA grant will be managed through [SCHOOL's] district office. The ____ *[District/School's]* Leadership team will identify a director of the grant who will oversee the Leadership team, school principals, and all other key stakeholders in this new initiative.

The following table outlines the individuals involved in this grant project and their tasks. *[School]* will implement a __ *[Customize time year(s)/months]* of strategies and activities, all of which will support a successful implementation of the literacy platform we will use with this grant funding.

Project Activities	Position Responsible	Other Staff Required	Date to be completed

Established Need (to be completed by district office) 10 points

[SCHOOL should consider the challenges that you are currently facing that are pertinent to your goals. SCHOOL should use school, district, local community, state, and/or national data from relevant assessments, teacher evaluations, graduation rates, etc. that demonstrate an urgent need for improvement. Note: Only talk about challenges relevant to the L4GA program goals. An example for a need that is aligned to the Achieve3000 Learning Platform is below.]

Background of school

[*SCHOOL*] is located in a small, rural town in [*name city/county]*, whose workforce is primarily comprised of farmers, welders, as well as many low-skilled workers. Many of the town's students come from economically disadvantaged homes and receive free and reduced lunches. Our elementary school qualifies as a Title I School with approximately 82% of the students being economically disadvantaged. The student demographic population is: 54% African American, 11% Hispanic, 5% multi-racial, 29% white, and 1% Asian.

Our teachers are qualified professionals, who have tirelessly worked with our district's Literacy Team's leadership to increase learning and instructional time in core subject areas of: ELA, mathematics, reading, social studies, and science. We also established a writing program that is structured in workshop format to teach students essential writing skills. Our teaching staff received [*specify hours]* of professional development to train in the writing workshops, learn approaches to differentiation of instruction in social studies, science, and reading/ELA. We've also scheduled a 35-minute block for Response to Intervention (RTI) or enrichment/extension. This strategy allows the teachers to group students with the appropriate level services (i.e. remediation, meeting standards, and exceeding standards).

Need for L4GA Grant

Analysis of assessment [*name assessments]* data reflects that a significant percentage of students are failing to meet standards in science, writing, and social studies. In addition, the data shows that a high percentage of students need additional support in reading, writing, and ELA to be ready for the Georgia Milestones Assessments. The teacher surveys revealed that over half of the teachers find that the students are not mastering the foundational reading skills from year-to-year. Significantly, more than half of the teachers feel that they are struggling to support their students appropriately.

In order to succeed in college and career, students need to read at the 1300 Lexile® reading level by the time they finish high school to be college- and career-ready. However, the national average Lexile levels of students graduating today are between 910 – 1210, and for ELL and struggling readers the average Lexile for 12th Graders is 720. For students at [School] Lexile levels are (worse/on par) [*Use data from your school/district/local community, and/or national]*. With the current data, it is imperative that we implement a literacy solution that will reach all of our students to give them the education that will prepare them for graduating high school and be college and career ready.

With the current data, we are convinced that this grant is imperative and will enable our school to implement an evidence-based literacy program that will reach *all students* and provide our teachers, staff, and administrative leadership with the skills and support that effectively address our critical needs.

Assets and Needs Assessment with Root Cause Analysis (to be completed by district office) 10 points

[SCHOOL should customize this section based on your root cause analysis. Below is an example response for the L4GA grant.]

[*SCHOOL's*] Literacy Team, including administrators, and teachers/staff from each grade level (Pre-K – 12) first met in [*specify date]* to draft the steps necessary for defining a comprehensive literacy plan. All teachers (and ancillary staff including special education, media specialist, and paraprofessionals) completed two surveys called [*name surveys]*). The Literacy Team analyzed the results from the surveys as well as the student data from [*name data sources*]. The Literacy Team then developed a schedule of meetings to prepare a literacy plan.

The data sources the Literacy Team analyzed: [*List the sources*], show a significant number of [*SCHOOL's]* students falling below reading standards on the current assessments [*name assessments]*. Performance in social studies and science is even less encouraging with more than 46% of third graders who did not meet standards. The teachers' survey results are in line with the students' results, which indicate that teachers need more support in helping students understand what they read. Lastly, data from [*name assessment or data source*] that a large proportion of students at each grade level (1^{st} – 12^{th} grade) need additional support in reading and ELA. The teachers' surveys indicate an agreement with this, in that literacy support and supplements are needed across all of the curriculum to improve literacy, which would also include writing strategies, and test taking strategies.

Assets and Needs Assessment with Root Cause Analysis: Engaged Leadership	
Concern: Need for a shared vision among school leadership, staff, students, parents, and the community.	
Root Causes: Need comprehensive literacy plan, need more out-of-school support for literacy, need more direct involvement from district personnel, and need for an awareness program that educates teachers about their role in literacy instruction.	**Current efforts addressing concerns:** • Leaders in schools/districts are working on a literacy plan. • Administration and district coordinating regular meetings with

<table>
<tr><td>There is an underlying understanding that all key stakeholders must promote literacy.</td><td>parents/community to discuss literacy planning and initiatives.</td></tr>
<tr><td colspan="2">Needs Assessment Data: __% [customize data] indicates that:
__% [customize data] – have received professional learning in literacy, but implementation is not consistent.
__% [customize data] – A community literacy program is not in place.
__% [customize data] – a system of learning support is not available in the community.</td></tr>
</table>

<table>
<tr><th colspan="2">Assets and Needs Assessment with Root Cause Analysis: Continuity of instruction for literacy for Pre-K – 12 for all students (includes RTI, GT, ELL)</th></tr>
<tr><th colspan="2">Concern: Need for a continuity of instruction with a focus on literacy across reading, writing, ELA, social studies, and science for PreK - 12</th></tr>
<tr><td>Root Causes: Need time for differentiated learning for all grades Pre-K – 12 (includes ELA, RTI, gifted and talented), need for collaboration to support literacy instruction across all content areas (language arts, science, and social studies), need for professional learning development for all content areas, and need for a comprehensive plan for writing in all areas of learning.</td><td rowspan="2">Current efforts addressing concerns:
Scheduling more ‘time on task’ for literacy instruction.
Regular meetings for each grade level staff with a priority focus on literacy instruction.
Restructuring professional learning development to include literacy instruction strategies.
Increased time in each content area to incorporate writing into class activities.</td></tr>
<tr><td>A rigorous, research-based, coherent, and consistent cross-curriculum literacy platform for all students is needed. Teachers need training to make this happen.</td></tr>
<tr><td colspan="2">Needs Assessment Data: __% [customize data] of teachers indicate that:
__% [customize data] – have received professional learning in literacy, but implementation is not consistent.
__% [customize data] – across discipline areas are not meeting regularly.
__% [customize data] – writing is only taught in ELA instruction.
__% [customize data] – literacy time is now being implemented for students who are struggling.</td></tr>
</table>

<table>
<tr><th colspan="2">Assets and Needs Assessment with Root Cause Analysis: Best practices in Literacy instruction</th></tr>
<tr><th colspan="2">Concern: Need for systematic research-based materials, resources, and professional learning for literacy instruction in Pre-K – 12 grades. Need to close the achievement gaps, especially in subgroups who historically have lower growth.</th></tr>
<tr><td>Root Causes: Need for professional learning development in literacy instruction in all content areas to implement, support, and</td><td>Current efforts addressing concerns:
Professional learning development plan is currently under revision based on</td></tr>
</table>

sustain success. Need research-based curriculum that is differentiated, motivates students to learn and perform at more rigorous levels, offers a continuum of learning from Pre-K – 12 with seamless consistency.	needs assessment to include literacy instruction. • More time is scheduled for literacy instruction.

Blog and Newsletter Articles

Example 1:

Context

Logi Analytics (acquired by insightsoftware, a global provider of enterprise software solutions) was a global computer software company headquartered in McLean, Virginia, United States. The company developed embedded analytics and data visualization tools for business intelligence applications.

Problem

The Director of Marketing at Logi Analytics needed a freelance technical marketing ghost writer to create B2B blog content about their embedded analytics and data visualization tools for business intelligence solutions while their fulltime writer was on maternity leave. They needed someone who could quickly absorb their product positioning and value and then turn out blog content that was technically accurate and persuasive.

Contribution

For six months I freelanced with Logi Analytics to ghost write blog content about a variety of topics related to business analytics, data visualization, and predictive analysis. I collaborated with the Director of Marketing and her team and analyzed source materials such as meeting recordings and presentation decks to create content that translated highly complex content that positioned Logi Analytics as a leader in data analytics and visualization solutions.

Impact

- The content I created clearly communicated Logi Analytics capabilities and their commitment to thought leadership.
- The content engaged current customers and created qualified traffic for business development.

LOGI NEWS

Dresner's 2017 Embedded BI Report: Our Top 4 Key Findings

NOVEMBER 30, 2017

This week, Dresner Advisory Services published the 2017 Embedded Business Intelligence Wisdom of Crowds report. This annual report provides insights for application teams that are modernizing or thinking about implementing analytics.

Here are our top four key findings from the 2017 Embedded BI report:

1. Adoption of BI Is Higher Than Ever

More than half of this year's respondents are now using embedded business intelligence, up nearly 40 percent from last year. And, nearly 30 percent of respondents plan to adopt embedded BI in the next 12 months.

Our take: If you haven't recently evaluated your analytics offering, consider whether it will continue to drive user adoption and engagement as these newer, more sophisticated requirements become commonplace.

2. Executives Continue to Drive Embedded BI Initiatives

This year's report reveals that 70 percent of executives and more than 80 percent of respondents in Research & Development (R&D) feel embedded BI is either very important or critical.

Our take: If you're seeking to initiate a modernization effort for your analytics, don't wait. There is no better time to leverage executive enthusiasm and gain the resources necessary to facilitate your project.

3. Driving Revenue Is Critical to Executives and R&D

As a whole, the Dresner report shows that both executives and R&D share one goal above all other business functions: driving revenue from embedded analytics. They know that embedded analytics drives user engagement, differentiates their offerings, and helps customers make better decisions.

Our take: Delivering compelling applications with analytics at their core has never been more crucial—or more complicated. We believe today's customers are looking for security that works and scales in multi-tenant deployments. They want APIs that give them flexibility to handle any analytic or integration need. And they expect unique user experiences and differentiated branding.

4. Dresner Continues to Rank Logi #1 in Embedded BI

For the third year in a row, Dresner ranked us #1 for embedded analytics in its Embedded Business Intelligence Market Study. This follows the June Wisdom of Crowds report, in which Dresner awarded Logi a "Perfect Recommend Score" in its assessment of 26 vendors.

Our take: At Logi, we firmly believe that our sophisticated capabilities—such as security integration, workflow, and write-back support—make us unique and set us apart from our competitors. We're proud to provide a developer-grade embedded analytics platform that brings tremendous value to product managers and their developers.

Example 2 and 3:

Context

Pearson Higher Education is a global leader in providing higher education institutions with world-renowned content and digital platforms that support educators with a wide range of products and services for teachers and trainers.

Problem

The Pearson Higher Education Operations Manager wanted to create a Grant Support and Services area that would provide universities and colleges, and workforce development organizations with information about federal, state, and private grants that would help them fund their enterprise-level educational goals and projects. They needed a dedicated resource to lead this new effort and strategize ways to establish Pearson as a thought leader in grant-related services.

Contribution

From 2012 to 2017, I contracted with Pearson as a Technical Writer, Proposal Manager, and Grant Services Marketing Lead. As part of this engagement, I strategized blog content topics that highlighted Pearson's positioning as an organization that was interested in partnering with universities and colleges, and workforce institutions to help them find the grants that would support their projects. I also created blog content that would highlight grant success stories and/or tips for applying for grants.

Impact

The grant blog content contributed in several ways:

- The blog articles provided in-depth information that conveyed Pearson's commitment to supporting their educational partners with resources that were practical as well as empowering as they planned projects for their institutions.
- The content established Pearson as a thought leader with expertise and insight into what their institutional partners were experiencing and needing. The content helped to build trust with their current and prospective clients.

Preparation is a Key Ingredient to be Competitive when Applying for Grants

Julie Orr, Grant Support, Pearson | July 28, 2015

Securing funding to start, sustain, and grow student success initiatives can be an arduous process. Unfortunately, there isn't a "magic sauce" to use that will ensure you win a grant award. Let's face it, applying for grants is a competitive process and if you ask any grant-project professional what the key ingredient is to succeeding, you will hear again and again – be prepared. To help your grant project and proposal stand out against the grain, put your best intentions to good use and be "grant-ready" when it is time to apply for a grant. Here are some of the steps to be competitive and prepare for a grant opportunity:

Get involved and collaborate. Identify partnerships with local and national agencies, regional organizations, and other relevant partners. Offer subject matter expertise locally and nationally to organizations, industry, LEAs, etc. The more a college or university is involved in the community, the easier it is to build a network for projects where they are looking for funds.

Make connections. Build relationships with grant funding entities and the program officers. Learn about the funding entity's mission and goals, and keep a pulse on the request for proposals; this is especially important before starting the application. Find out about a granting entity's priorities.

Have all your records, registrations, data, and estimates in place before you start the application. Reach out to your organization's and partners' stakeholders and gather all the necessary materials for the application. Note that you'll need to follow the exact grant application requirements so there may be additional research and information to gather later on in the application process.

Start the application as early as possible. Apply for grant funding early. Collaborate, research, and plan for multiple revisions.

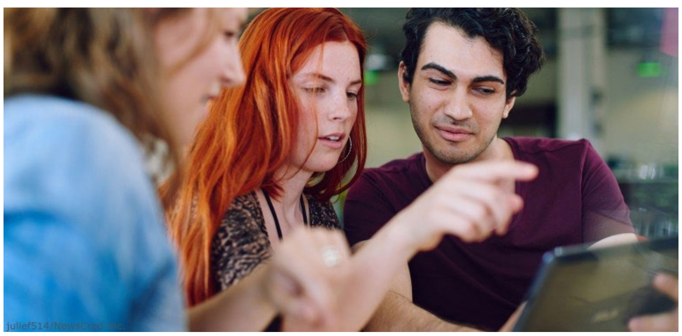
Research and plan to embed your findings into a proposal. Compelling grant proposals offer well-researched evidence of need and show detailed and complete implementation plans.

Try again (and again) if denied funding. It is important to follow up with a grant entity to determine the strengths and weaknesses of a grant proposal. Most grant foundations and agencies will offer suggestions as to how to revise a grant proposal and re-apply for a future competition.

Even if there is not a current grant program that is relevant to your organization's needs, you can begin preparing for a project in anticipation of finding a future funding opportunity. Investigate previous opportunities to find out about similar projects that have been funded. Likewise, look at previous grant competition requirements to find out what may be required when you are ready to apply. As you do your research, take the above steps and prepare, you'll find that your efforts will be well worth the effort.

Sage advice to secure grant funding for CTE programs

Julie Orr, Grants & Funding, Pearson | May 24, 2016 in Higher Education, PreK-12 Education



Sheri Carson, CTE instructor at Roseburg High School (RHS) in Roseburg, Oregon, recently shared insights and tips other Career Technical Education (CTE) directors and instructors can use to plan a grant-funded project. RHS recently won funds from the Oregon Department of Education and Oregon Bureau of Labor and Industries CTE revitalization grants. The high school received two grant funding sets totaling $358,909, that will help build the following programs: culinary arts, early childhood education, business/marketing, construction/woods, metal/manufacturing, and drafting/engineering.

Q. What factors do a secondary or post-secondary school need to consider *before* writing a grant to fund CTE programs?

Sheri: There are many things that should be considered before writing a grant. You need to think about what [resources] you have to work with and what your vision is for your CTE Programs. The staff that will be impacted need to be part of the process because they will be doing the work once a grant is awarded. Here are some other considerations:

1. The skill level of the instructors.
2. You'll need to choose a coordinator to oversee the grant, and to keep things moving forward.
3. Meet with industry partners to get their input as to what equipment to purchase for the CTE program. Equipment is an important factor and will make the transition from school to industry easier for students.
4. Draft a blueprint of the building for equipment placement, and for electrical needs.
5. Share the blueprint with the stakeholders to find out what needs to be done to be able to implement your vision.
6. Get at least three quotes for building improvements, electrical needs, equipment, etc.
7. Always consider how you are going to maintain everything after the grant cycle is complete.

Q. Do you need to talk with administrators or other key stakeholders to gauge their support?

Sheri: Yes, most definitely, meet with the Administration to present your findings**.** The meetings will provide you both with the chance to weigh the pros and cons of the program, and to determine if you have their backing or not to proceed.

Q. Where in this process do you look for a grant (Federal, State, or private) to finance the CTE projects that you're envisioning?

Sheri: Once you have the backing of the Administration, then you can look for potential grants that are out there, which can help you achieve your vision. In Oregon, we are very fortunate that there is currently a push for CTE programs. Over the years we've seen many schools with CTE programs and then as budgets started decreasing, CTE programs were on the chopping block because they were not a core class and many take money to be able to function. As most of us know, not every student is going to go to college and for those who do not, they will need training in a trade to make a living. Currently, the State of Oregon is receiving money to boost CTE programs, which is done through grants issued through the Oregon Department of Education.

Q. Can you give any guidelines as to how you use industry partners to inform and shape CTE programs?

Sheri: It is very important that you have industry partners and that they are involved in the process of choosing equipment, skills to be taught, and other industry related items. Every one of our CTE programs must have an advisory committee. The advisory committee is made up of industry personnel, who help the instructor identify what skill sets the industry is looking for, so that the students can be trained accordingly.

I have the instructors call, visit or send letters to those in their industry sector, asking if they would like to be on their advisory committee. The instructor also explains the role of an advisory member. Also, we want to make sure that we don't ask for too much of their time, so we usually meet twice a year, unless there is something that needs more attention. If something is needed in between the times we meet, we'll email or call to get input from the members.

When you reach out to industry partners, you'll need to communicate that you want to learn how to train potential employees in their industry. You can always add to the advisory committee, as new people want to get involved.

The instructor and the advisory committee meet to go over what equipment is essential and what items it would be 'nice to have if there is extra money available. We have been very fortunate with the industry partners who work with us. They are willing to provide us with materials, guest speakers and/or projects for our students to do. For instance, we are building trailers for two of our partners. They provide the materials and we have our advanced students build them. The industry partner sends one or two employees to inspect them and then once they meet the approval, they take the trailers back to their shop, paint them, put their name on it, and then sell them. Our program, then receives an agreed upon amount for constructing the trailer. Several of our programs have similar partnerships.

The advisory committee will also go over the blueprints and equipment list and help you get quotes as to how much it will cost to make your CTE program vision a reality. You'll use this information when you're developing the budget for a grant proposal. Remember to always add at least 10 percent to the amounts of each item or task because something usually is omitted but necessary to be able to complete your project. There is nothing worse than starting into a project and finding out that something is costing more than you budgeted for it, resulting in the project not getting completed. Alternatively, if your budget is *more than you need* in one area, you can usually move the money to another area, to purchase something else.

Q. Can you talk a little about writing a grant proposal? Can you provide advice on the proposal development?

Sheri: Once you have all the quotes for building improvements, equipment, extra money for staff, trainings, professional development and any other areas that you may need, then you start writing your grant proposal. It is very important to follow the directions as you go through the grant writing process. Many grants have a certain number of words and/or pages that are permitted for each section required. I would always have a few people read over each section as you complete it and score it based on the criteria listed in the grant. External reviews can help you see what areas you need to clarify and items you may be able to omit. Each area is awarded a point value, which is then compared and rated with the other grants that are submitted. The granting organization uses the criteria to identify who is awarded grant money.

After you win grant money, you must be prepared to provide progress checks at intervals throughout the grant performance period. The progress reports will be laid out in the granting entity's requirements, so you'll know when and what type of information to collect, and also how to report it.

About Sheri Carson

Sheri Carson is a family and consumer science instructor with an emphasis on culinary arts, hospitality, tourism and recreation. Sheri received her A.A. degree in general education from Umpqua Community College in 1993. In 1996, she received her B.S. in health/physical education from Western Oregon University. She went on to take another 75 graduate credits though Southern Oregon University and Grand Canyon University. In 1998, she became the FCCLA Advisor during her first year of instruction at Roseburg High School. Sheri became the first female CTE Division Leader and Perkins Grant Coordinator for Roseburg Public Schools in 2014. Having co-owned her family construction company, she has a very diverse background. Her diverse background helps her with both the education and the business aspects of CTE programming. She has been a flagging instructor for 25 years, American Red Cross First Aid/CPR instructor for 27 years, and the former traffic control supervisor for 12 years. All of these experiences have made Sheri very passionate about career and technical education. She is extremely committed to re-building and expanding Roseburg High School's CTE Department.

Newsletter Articles

Context

From 2001 through 2012 I was primarily a stay-at-home mom looking after my two boys. During that time, I volunteered with Jewish Family Services (JFS) of Denver and wrote stories of impact and other news for JFS.

Problem

JFS worked on tight budgets and needed a volunteer writer to contribute to their monthly newsletter. The editor needed someone to research topics and then write long-form articles for the newsletter that highlighted JFS's impact in the community.

Contribution

From 2010 to 2012, I worked closely with the JFS Editor to create articles that highlighted JFS's work in the Colorado community. I interviewed individuals who were directly involved with JFS. I also researched topics that aligned with JFS's mission and would be interesting to their audience.

Impact

- The articles illustrated JFS's work in the Colorado community. They highlighted the organization's commitment and contribution to helping vulnerable populations. The articles established trust with the people who donated money to the organization. It also helped to build trust with the people who benefited from their work.

FamilyMatters

Volume 22, No. 3 • May/June 2012

***Family Matters** is published bimonthly by Jewish Family Service of Colorado, 3201 S. Tamarac Dr., Denver CO 80231*

Jewish Family Service

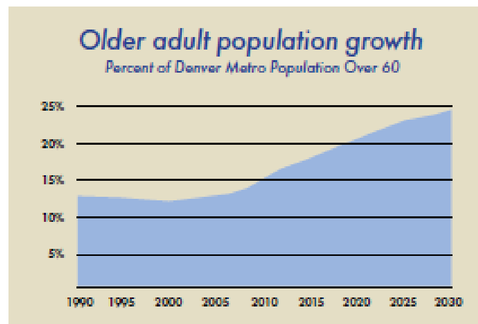
Improving lives. Rebuilding hope.

Seniors Are Coming to Colorado

JFS Responds to Colorado's Aging Population Forecast

by Julie Orr, Volunteer Writer

Jewish Family Service's Senior Solutions department is responding to recent population forecasts from the Colorado State Demography Office that predict a 25% increase in the number of older adults living in the nine-county Denver region between 2012 and 2017.



Source: Denver Regional Council of Governments (DRCOG)

In 2011 the first baby boomers turned 65 and by 2030 nearly one in four residents in the Denver metro area will be over the age of 60. The region will also experience an 18% increase in the 75+ population over the next five years. Cathy Grimm, LCSW, director of JFS at Home, JFS Senior Solutions, and Boulder JFS, says, "JFS will continue to meet the challenges of the ever-changing local community and the growing older adult population with a strategic three-year plan that will meet the greater need for the services and programs that the agency already has in place."

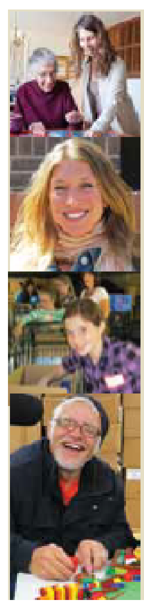
JFS Senior Solutions provides a variety of services to help older adults live safe, healthy, and independent lives. "In the next three years, JFS will strive to increase the number of geriatric care professionals to address the challenges associated with aging," says Grimm.

JFS will continue to proactively support metro Denver's aging population and their families as they navigate the complex medical system and benefits plans, and will generally act as a liaison between the medical community and its clients.

Another significant initiative in the agency's plan is to increase public awareness of JFS's role as a "single point of entry" for care management and in-home support for all aging adults, whether they are Jewish or not. These services and programs are also available to clients with limited ability to pay and special populations, including Holocaust survivors and the lesbian, gay, bisexual, and transgender (LGBT) community. "These populations are by nature not ones to reach out for assistance," says Grimm.

Along with educating the public about the many programs and services available, JFS will continue to refine its work in building the community.

Continued on page 11



In This Issue

Thank You to the JFS Executive Luncheon Sponsors!

At press time, tickets were sold out for the eighth annual JFS Executive Luncheon featuring Christopher Gardner, on May 8. Thank you to our event sponsors (as of April 3, 2012) who helped make this event a success:

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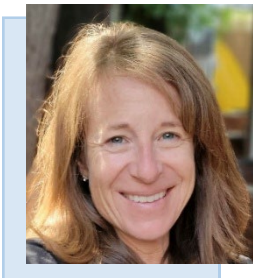
Seniors Are Coming to Colorado *continued from page 1*

The agency will maintain its partnerships with the JCC, local synagogues, other human services agencies, and the community at large to provide social, recreational, educational, and health programming to older adults.

JFS understands the critical role its senior services programming plays in the greater Denver community. The agency creates and implements programs that emphasize enhancing the quality of life for older adults to allow them to remain independent and healthy for as long as possible. ●

Julie Orr is a Denver native who resides in Centennial, Colo., with her husband and two boys. She is a volunteer writer for Jewish Family Service, an agency she admires and believes is making the world a better place.



For over 20 years, I've helped organizations bring clarity to complex information through technical communication, business analysis, and thoughtful collaboration. My background in user-centered design, adult learning, and publication development has shaped the way I approach every project—with curiosity, collaboration, and a genuine commitment to understanding what success looks like for each client.

Whether I'm developing a documentation strategy, improving business processes, or creating user-focused content, I believe the best solutions begin with listening. I enjoy asking thoughtful questions, understanding the bigger picture, and creating practical solutions that reflect each client's unique goals, not simply delivering another document.

If there's one thing clients can count on, it's that I'll be a collaborative partner who communicates clearly, follows through on commitments, and genuinely cares about helping their projects succeed.

I earned a Bachelor of Arts in English and Political Science from the University of Denver and a Master of Science in Technical Communication from the University of Colorado.