

Equal Opportunity Planning Committee

Instructions for Completing Proposal Forms

These instructions outline the process for submitting Equal Opportunity Planning Committee (EOPC) proposal forms. Please use the word template to complete your proposal.

Even though EOPC proposals may be submitted for up to five years, each year requires a separate proposal submission. Please do not use any proposal forms from previous years for this process.

These instructions introduce some overall considerations to help you develop the proposal. In addition, you should also review the annotated proposal form that provides some more specific information on how to fill out the form and an example proposal so you can see what a proposal can look like after it is completed.

Overall Criteria

Proposals that best meet the following overall criteria will be the most competitive:

1. articulate well with University or unit strategic plan;
2. communicate clearly outcomes and assessment;
3. have the potential to reach a broad constituency or have a strong impact;
4. are achievable; and,
5. optimize financial efficiency and effectiveness.

Preparation

Before you begin the proposal, you should look at the Penn State Strategic Plan <http://strategicplan.psu.edu/>, especially under the Foundations section for “Fostering and Embracing a Diverse World.” Your proposal should be aligned with this foundation or your unit’s strategic plan <http://strategicplan.psu.edu/unit-planning/>. You must ensure that your unit executive and immediate supervisor approve of the proposal and that your financial officer is prepared to handle incoming EOPC funds and return unused funds.

Budgets should clearly support desired outcomes and demonstrate an intentional stewardship of resources, maximizing impact. Develop your proposal and identify your funding category from the following choices: Campus/Unit Climate, Curriculum, Faculty/Staff Recruiting, Faculty/Staff Retention, Leadership Development, Student Recruiting, Student/Retention Graduation, and Organizational Change. EOPC programs are evaluated on the basis of the cost compared to impact.

Year 1: Proposals requesting more than \$5000 require matching funds committed by units or external sources. Funding is limited to five years and each year requires a separate proposal submission.

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Years 2-5: In general, the maximum funding available will decrease approximately 20% as compared to the previous year.

Abstract

We recommend keeping the “abstract” brief (that is, less than 50 words).

Outcomes Assessment and Methods Used to Gather Them

The Outcomes Assessment should state the tangible, concrete results you hope the program brings about in comparison to baseline or your initial measurements, along with the methods you intend to use to gather them. For example, if you want an increased recruitment rate for a given population, the critical questions to ask are what is your rate now, and by how much do you want it to increase (i.e., what is your threshold for what you define as “success”)? How should participants be changed as a result of the proposed program? How will you gather these baseline and outcome measures? This concept can be applied to all funding categories. The more specific the outcomes assessment is, tied to actual results (not program activities), the more competitive your proposal will be. Proposal writers are especially encouraged to seek outside assistance from those with expertise on developing outcomes assessments for this section of the proposal.

Description of Program Participants, Need, Goal(s), Actions, and Strategic Plan Linkage

Program Participants: Avoid ambiguous terms like “minority,” “at-risk,” and so on. Terms like “Black/African American”, “first-generation/low income,” and “students with learning disabilities,” are preferred because they convey more concrete meaning.

Need, Goal(s), and Actions:

Need: Briefly explain why this program is important for your unit. What “need” does the program fulfill? Why is the proposed program necessary?

Goal(s): Overall, what does your unit hope to accomplish by implementing this program?

Actions: This item should probably contain the most detail in this section and should outline how you plan to accomplish your goal(s) and intended outcome(s).

Strategic Plan Linkage: The best method for linking a strategic plan is to provide a direct quote and a page number reference from Penn State’s strategic plan or your unit’s strategic plan.

Proposed Budget

Use the first cell in each row to not only label the line item (e.g., Travel, Meals) but to give a brief description of how the money will be spent and to break down some costs (e.g., bus trip for participants @ \$500 per bus).

You cannot use “in-kind” support for unit/external support. By “in-kind” support, we mean anything that is not direct dollar support, such as calculating dollar support from a faculty/staff member based on their salary and time spent on the program or amortizing the use of equipment (e.g., laptop computers).

EOPC will not provide funding for:

- Gifts, “giveaways,” or prizes
- T-shirts, buttons, balloons, and other such items
- Conferences where travel is required (except for students who are making presentations, and expenses must be split 50/50 between EOPC and unit)
- Research projects, computer hardware, art, or library collections
- Wages/honoraria for 12-month full-time Penn State employees or graduate assistantships (EOPC will consider 9- or 10-month full-time employees during their “non-contract” months or funding graduate and/or undergraduate students on wages)
- Instructor salaries for Penn State courses where tuition is charged unless the tuition dollars generated by a specific course are inadequate to cover the instructor’s salary

Timeline

The timeline should include the major program activities beginning with any preliminary steps before the program actually begins. The timeline does not need to be exceptionally detailed. Usually, five to ten major program milestones along with the time frame in which they occur is sufficient. See example below:

March 20XX:	Develop flyers for the program and send out to potential program participants
April 20XX:	Receive information back from potential participants and begin the interview process
May 20XX:	Make final selection of participants
June 20XX:	Program begins
June 20XX:	Events – first workshop cycle with academic mentors; first field trip; study sessions three times a week; pizza socials every Thursday evening
July 20XX:	Events – second workshop cycle with faculty; “Meet the Chancellor” session; second field trip; study sessions three times a week; final luncheon with Chancellor, faculty, and parents
July 20XX:	Program ends
August 20XX:	Write program evaluation
September 20XX:	Submit evaluation

After you complete the proposal, submit via email to eopc@psu.edu.

If you have any supporting documents, such as assessment instruments, retention/graduation tracking forms, or program flyers, please append to the proposal. Supporting documents should not exceed ten total pages in length.