

Overcoming Writer's Block: A Step-By-Step Strategy for Writing Successful Annual Reports

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COLUMBUS STATE

COMMUNITY COLLEGE

1.0 Background

Over the course of four short years Columbus State Community College's Grants Office has become a recognized leader in both securing grant funding and fostering project success. This change began with the appointment of new leadership for Grants Office in 2014 has led to dramatic changes of the college's grants strategy, structure, and staffing levels. In four short years, for example, Columbus State grew annual awards from \$1.4 million in 2013 to \$14.8 million in 2017, and its grants portfolio expanded from \$11 million to more than \$48 million.

Columbus State accomplishments in transforming their grant operations is best illustrated through its track record of success with National Science Foundation's Advanced Technological Education program. With an emphasis on two-year colleges, the Advanced Technological Education (ATE) program focuses on the education of technicians for the high-technology fields that drive our nation's economy. The ATE program seeks to improve technician education through active partnerships with industry, curriculum development; professional development of college faculty and secondary school teachers; career pathways; and other activities.

In 2014, Columbus State was awarded two grants from the National Science Foundation, Advanced Technological Education program: "Next Generation Multi-craft Manufacturing Support Technician" (DUE 1400354) and "Building an Academic Pathway for Logistics Engineering Technicians" (DUE 1400542). These awards marked a key milestone and turning point for the grants office. Now in 2017, Columbus State leads eight active ATE projects, more than any other college in the nation.

2.0 Problem

The growth in the number of grant projects within the Division of Business Programs and Engineering Technologies presented both new challenges and opportunities for the Grants Office and projects teams at the college. Initially project teams for each grant were based at the department level, which stifled collaboration, communication, and best practice sharing between projects.

During the first year of the grants, each project team operated independently sharing similar successes and challenges as new grantees. A key challenge each project faced was developing an effective process and strategy for annual reporting requirements. For many project teams one of the most daunting aspects of grant management is crafting a well-written annual report that effectively captures the efforts and accomplishments of a new grant project.

3.0 Solution

Columbus State made initial strides in increasing the number of active grant awards, which also created the opportunity to consolidate and focus grant efforts. Creating a new grants supervisor position provided leadership and cross-project coordination for all grant project teams. The creation of this position allowed for the development of a strategy for handling annual reporting requirements common to all active ATE grants.

Columbus State's strategies for writing annual reports is based upon three key components:

1. Knowledge of reporting requirements and formats
2. Structured annual reporting timeline
3. Best practice sharing and learning from past experience

Each of these three items have been consolidated into an internal training document made available to all project team members that guides Principal Investigators and project staff through the process of planning, brainstorming, writing, and submission. The key strategies of these findings are summarized below.

4.0 Success Strategies

Columbus State has identified three core components that help ensure project teams successfully meet reporting requirements.

1) Knowledge of Reporting Requirements & Formats: Ensuring that all project team members are familiar with required components and formats of the annual report is the first step to ensuring a well-written annual report. Annual reports are comprised of three key elements that work together and complement each other:

1. **Project Reports Template** – The official template from Research.gov that provides a plain text version of the questions and topics that need to be addressed in the annual report.
2. **Appendices** – Annual reports are primarily text-based reports. Appendices are a valuable part of the annual report that allows the project team to provide additional information with images, tables, charts, or other graphics. Grouping documents around a common theme allows project teams to provide further work samples.
3. **Evaluation Report** – This report is written by the external evaluator and provides an external account of the implementation, success, and impact of the project. The project team should actively partner with their external evaluator to ensure continuity and consistency.

2) Structured Annual Reporting Timeline

One of the most crucial elements to writing a detailed and comprehensive annual report is allowing for ample time throughout the pre-writing, writing, and review processes. Columbus State's has created a three-month timeline that can be used to structure the writing process. Sharing the timeline with all members of the project team and external evaluators is a key step.

Writing Sample Timeline

Prepare

Week 1: Communicate Reporting Requirements

- Review annual reports resource guide, the project reports template, and previous annual reports if applicable.
- Assign roles and share the reporting timeline with the project team.

Weeks 1-3: Planning & Data Collection

- All team members are responsible for actively participating in the planning and data collection phase.
- Project teams should collect a wide breadth of information related to project achievements and milestones.
- Common types of information collected include: individual progress updates, work samples, project work plans and documentation, survey and evaluation feedback, program metrics, etc.

Week 4: Group Brainstorming

- Schedule a 60 to 90-minute meeting that focuses specifically on brainstorming and discussing content for the annual report.
- Use the project reports template to guide the conversation.
- Include all project team members and your external evaluators.

Write

Weeks 5-6: First Draft Writing & Clarification Seeking

- All information is compiled by the project team and assembled into a first draft.
- It may be useful to mirror the format of grant proposal or project narrative during this phase to ensure that all project areas are addressed and considered.
- The focus of this stage is ensuring that all information is accurately captured and integrated.

Revise

Week 7: First Draft Review

- First drafts should be reviewed by the project team and two to three people outside of the project team.
- Including individuals from both inside and outside the project team will help ensure that useful content is not omitted and that content is presented in an accessible way.

Week 8-9: Final Revisions

- Feedback and comments are evaluated and final revisions are made.

Week 10: Annual Report Submission

- The final version of the annual report with appendices and the evaluation report uploaded and submitted through Research.gov.

3) Best Practice Sharing & Learning from Past Experience

The development of Columbus State's internal resource guide on annual report writing is based upon the success and lessons learned of past projects. The top recommendations from our project team and external evaluators are included below:

Writing Tips

1. Start the writing process early and include all members of the project team.
2. Communicate the importance of the annual report, the writing timelines, and the responsibilities of each team member.
3. Include the entire project team in the brainstorming session. It can be difficult for one person to remember everything that has happened in a year.
4. Use the NSF Annual Report Template to guide the group brainstorming discussion. Take the time to discuss each section and have one to two individuals responsible for taking detailed notes.
5. Think broadly about what you can include in your annual report and the reach of your project.
6. Identify a list of needed information and assign project members with a responsibility for providing this information by a stated deadline.
7. Address all sections of the annual report, whenever possible. It is not advisable to skip multiple sections throughout the report.
8. Always write with a positive tone. When discussing project challenges or delays, be sure to address your project's change in approach and what you are doing to proactively manage the challenge or delay.

9. Revisit your grant narrative. While writing the annual report use your grant narrative to guide and organize your key accomplishments and activities.
10. If you do not have any activity to report for certain deliverables, be sure to include your project's plan for addressing them during the next phase of the project.

5.0 Lessons Learned

The new strategy for annual reporting was first developed in 2016 and piloted by three active grant projects and was later refined in 2017 by four active grant projects. The framework developed has proved successful for helping both new and more established project teams from multiple disciplines effectively managing reporting timelines and develop comprehensive annual reports. This coming year all eight active projects will leverage this framework for annual reports.

6.0 More Information

- Research.gov, About Project Reports
https://www.research.gov/research-portal/appmanager/base/desktop?_nfpb=true&_pageLabel=research_node_display&_nodePath=/researchGov/Service/Desktop/PublicOutcomesReport.html
- NSF Project Reporting Template:
<https://www.research.gov/common/attachment/Desktop/NSF%20Project%20Report%20Template.pdf>



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