Grants De-Mystified

1. Introduction
2. Grants Overview
3. Project Development
4. Grant Components
5. Budgeting
6. Prospecting
7. Grant Management
Exercise

Interview colleague, then introduce

Name/hometown
✓ RARE project
✓ Grant writing experience
✓ Description of project that needs grant funds
✓ Favorite musical artist
Grants Overview

Operations

Projects

Capital
Sources of funding

Public Tax Base

Private Foundations & Corporations
Government
Foundations

THE PAUL G. ALLEN FAMILY FOUNDATION

Meyer Memorial Trust

Western Lane Community Foundation
Corporations
BUT FIRST - Program Planning

Key Steps:
1. Clarify the need
2. Develop plan with goals and measurable objectives to address the need
3. Select effective interventions to achieve these objectives
4. Implement selected interventions
5. Evaluate interventions based on objectives
Program Planning

1. Community Need
2. Strategic Planning
3. Identify Goals & Objectives
4. Program Design
5. Program Implementation
6. Program Evaluation
EX. McKenzie River Valley

• **Community Need**– Spotted Owl indicates over-harvesting of timber. NW Economic Adjustment Initiative – closing mills/funding alternatives

• **Strategic Planning** - facilitated citizen involvement throughout valley to create MRSP

• **Goal** – Educate local youth about watershed health

• **Objectives** - % participate and learn, % increase in stream health

• **Program Design** – Global Rivers Env. Ed. Network Curriculum

• **Program Action** - Year 1 implementation; Elk Creek monitoring and stream restoration by 9th graders

• **Evaluation** – Pre/Post, Data Analysis
DIGGING INTO THE GRANT
Grant Components

- Executive Summary/Overview
- Need statement
- Project description
- Evaluation plan
- Organization history
- Budget
- Requested attachments
Executive Summary

Synopsis of Proposal:

✓ Problem (poor H2O quality, loss of jobs)
✓ Solution (>environmental awareness/ >job skills among youth)
✓ Funding requirements (total/request)
✓ Qualifications of organization (MHS, PTA and skilled teachers)

*Prepare after grant completion
Need Statement

• Statement of the problem
• Evidence that supports the need
• Data including local and national
• How project addresses problem
• Alignment with funder objectives
Exercise

Write a brief needs statement for your program/project.
Project Description

• GOAL – the overall purpose of project
• OBJECTIVES – measurable outcomes of the project
• ACTION – Inputs, Activities, Timeline, Outputs
• STAFFING – responsible party for financial, project outcomes, reporting
• SUSTAINABILITY - long-term viability; finite (one time)
Exercise

• What is the goal of your program?
• What are the objectives of your program?
  o SMART: Specific, Measurable, Action-oriented, Realistic, Timed
Program Plan (Logic Model)

Scoping & Planning

i) Current situation

ii) Desired vision

Inputs

What we invest

Activities

What we do, and who we do it with

- Tasks
- Processes

Outputs

Goods & services produced

Outcomes - Intermediate Long-term

What happens because of it

E.g. changes in:

- Capacities
- Partnerships
- States
Exercise

Prepare a basic *program action plan (logic model)* using the template provided.
Evaluation

Did program achieve goals and objectives?

- PROCESS – measures project implementation
- IMPACTS – measures project benefits
Exercise

Complete a data collection plan using the form provided.

<table>
<thead>
<tr>
<th>Measurable Outcomes</th>
<th>Participant</th>
<th>Indicator</th>
<th>Assessment Tool</th>
</tr>
</thead>
<tbody>
<tr>
<td>% of students who increased environmental knowledge</td>
<td>9th Students</td>
<td>% correct answers on test</td>
<td>Pre/post test</td>
</tr>
</tbody>
</table>
Organization Overview

- Short history of nonprofit, founding date
- Mission statement
- Project’s relationship to Mission
- Description of organization's:
  - governance
  - programs
  - special expertise
  - annual outcomes
Exercise

Write a organization overview: mission, history, and link to project. Include brief description of partners as well.
Budget

Revenue:
- Government
- Foundation
- Corporation
- Fee for Service
- Other

Expenditures:
- Staff Time
- Supplies
- Equipment
- Rent
- Marketing
- Other!!
# Sample Expense Budget

<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
<th>Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>GREEN Consult</td>
<td>Curriculum/Onsite</td>
<td>$9000</td>
</tr>
<tr>
<td>Teacher time</td>
<td>10% over year</td>
<td>$4000</td>
</tr>
<tr>
<td>Materials</td>
<td>text books, H2O kits, trees</td>
<td>$5000</td>
</tr>
<tr>
<td>Travel</td>
<td>mileage to/from site</td>
<td>$40</td>
</tr>
<tr>
<td></td>
<td>(100mi x $.40)</td>
<td></td>
</tr>
<tr>
<td>Equipment</td>
<td>backhoe rental</td>
<td>$500</td>
</tr>
<tr>
<td>Subtotal</td>
<td></td>
<td>$18540</td>
</tr>
<tr>
<td>Overhead</td>
<td>10% of total</td>
<td>$1854</td>
</tr>
<tr>
<td>Total</td>
<td></td>
<td>$20394</td>
</tr>
</tbody>
</table>
Exercise

Prepare a basic *Budget* using the template provided.
Attachments

- Project budget
- 501c3 tax letter
- Organizational budget
- Audited financials
- Board of directors list
- Letters of support

NOTHING MORE, NOTHING LESS THAN REQUESTED
PROSPECTING FOR GRANTS
How to find funds?

• Examine resources to find potential funders:
  ✓ Government purchasing websites
  ✓ National and State foundation chronicles
  ✓ Annual reports of similar organizations
How to find funds, cont.?

Online

Library

Board Members

Colleagues
Prospecting: Public
Prospecting: Private

The Oregon Foundation DataBook

Columbia Land Trust

REACH Community Development

A Healthy Community Begins and Ends
Oregon Foundations

Meyer Memorial Trust

THE OREGON COMMUNITY FOUNDATION
Here for Oregon. Here for Good.

THE Ford Family FOUNDATION
Verify Eligibility

• Organization type: 501c3? Local Government?

• Geographic Restrictions: Local, State, Regional, National, International

• Alignment with mission, goals, objectives: Environmental, Youth, Capital
Exercise

*Identify three prospects:*

*public or private sector*
Formatting

✓ Number of copies
✓ Page binding
✓ Page limits
✓ Font and margin specs
✓ Forms to sign and/or attach
MANAGING THE PROCESS
Create a team

Team Roles
- Project Manager
- Budget developer
- Content experts
- Document editor

Brainstorm

Assign & Remind
• WORK BACK from ultimate due date
• Create a CONTENT CHECK LIST w/ due date
• Create a PROJECT CHECK LIST w/ due dates
THANK YOU!

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