

Grants for the Places We Love – Securing Funding for Oregon’s Parks and Special Places

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Today’s Topics

Basic Tools for Success	<i>Deborah</i>
– Designing Fundable Projects	
– Realistic Planning	
– Measures of Success	
Grantwriting Basics	<i>Sharon</i>
– Types of Proposals, Proposal Components	
Finding Funding – the Research	<i>Sharon</i>
Courtship – Approaching Funders	<i>Sharon</i>
Questions and Answers	<i>Sharon and Deborah</i>

About Your Presenters

- Sharon Leighty, Executive Director, *Oregon State Parks Trust*

Sharon is the Executive Director of the Oregon State Parks Trust and is responsible for securing funds for Oregon State Parks Historic and Cultural Resources. She has directed capital campaigns for the restoration of Vista House and historic state parks throughout Oregon.

- Deborah Krause, President, *Claro! LLC*

Deborah is a principal of Claro!, an Oregon-based strategic planning, marketing and fund development consultancy. She also is an Adjunct faculty member in the Institute for Nonprofit Management at Portland State University where she teaches Program Development and Grantseeking.

The Good News...

- There is money to be had for good programs and well-planned projects



The Bad News...

- Challenge to identify opportunities
- Submission deadlines that are not in sync with project's developmental life stage
- Substantial investment of time for no certain gain
- Competitive environment



How Community-Based Grant-Funded Projects Get Started

- Community effort
 - Perceived community need
- Government or foundation initiative
 - Often a result of legislative mandate or research results



Thinking about Your Project

“First comes thought; then the organization of that thought into ideas and plans; then transformation of those plans into reality. The beginning, as you will observe, is in your imagination.”

- Napoleon Hill

Who Cares, and Why?

- Funders
- Constituents/Users
- Regulators/Evaluators
- Governing Boards



Think through stakeholders!

Think Journalism



Who, What, Where, When, and Why

- What, really *what*, are you trying to accomplish?
- Can you state it succinctly on one page?
- If you can't you probably don't yet have enough clarity and focus to write a full proposal or even a letter of inquiry!

The Community Need or Problem to be Solved



Remember, it is not about *you* (or your organization).
It is about what the **community needs**.

- How do you know it is a problem?
- Why does it need to be done *now*?
- Who else is working on this problem or need?

Opportunity, Need or Problem Statement

Describe the opportunity, need or problem you propose to address.

- What specific **LOCAL** data, evidence or documentation can you offer that describes the need? *Quantify!*
- Are others addressing this issue? What has worked? What information is available from other sources?

Example: Opportunity, Need or Problem Statement

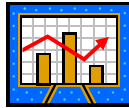
Wheelchair visitors to the Park Headquarters are limited to viewing the outdoor kiosks because the entrance to the Interpretive Center is not accessible.



Incorporating and Presenting Data

Break up the text with tables, charts, and graphs

- Tables
 - Numbers or columns of numbers where the strength is in comparing the details
- Charts and graphs
 - Capture and organize data into visual aids
 - Add color and visual impact
 - Graphs are temporal and illustrate *trends*



Eschew Obfuscation

- “Ninety percent of this game is half mental.”
 - Yogi Berra
- “Where all the children are above average.”
 - Garrison Keillor
- “64% of our clients favored the issued by an 80-20% margin, while 16% indicated they did not care, and 20% refused to provide an answer.”
 - News article

Getting it Down on Paper – I



Time to try your hand at getting it down on paper!



Select one of your areas of interest, then...

THE PROBLEM OR
OPPORTUNITY

Write out a one or two
sentence

problem statement

Target Population



Whom, specifically, are you trying to affect or serve?

- A specific group of people, described in terms of size and geographical location, to whom you will direct your interventions.
- Examples:
 - Estimated 5,000 annual overnight trail users.
 - Park visitors with limited mobility – estimated at 2,000/year.

Proposed Interventions

What specific interventions or activities do you intend?

An intervention:

is a set or cluster of activities that impacts a specific group (*target population*) to effect specific results (*expected changes*).

Examples of Interventions

- Data collection
- Needs assessment
- Program development
- Services
 - Trail maintenance
 - Habitat restoration
- Historic preservation



Expected Changes/Outcomes

What changes do you want to bring about as a result of your interventions?

What do you expect to accomplish (change):

- By *6 months*?
- By the *midpoint* of the grant period?
- By the *end* of the grant period?
- In the *long term*?



Tips: Expected Changes/Outcomes

- Changes occur over time. Anticipate progress according to predetermined milestones.
- Refer to **RESULTS**: benefits to individuals or populations during or after participation in your project.
- May relate to values, attitudes, knowledge, skills, behavior or conditions.
- *Are NOT activities staff intend to perform (effort) or in which users participate.*

Nailing Down the Project Activities

Take your Problem Statement or Opportunity...then...

PLANNED INTERVENTION
OR ACTIVITY

Write out a one or two sentence description of **WHAT** you will do over what **TIME FRAME** with **WHAT YOU EXPECT** will be the **RESULT**

Methods and Project Plan



- **Who** is going to do the work?
 - Will you be collaborating with any other organizations?
 - Will you be hiring staff? Qualifications, hiring, supervision.
 - Who will manage the project's finances?
- **When** are you going to carry it out?
 - Timelines, Interrelationships and Dependencies
- **What**, exactly, are you planning to do to achieve these ends?

Measures of Success

How will you know if you have been successful?

- What will you measure? What indicators will you look at, e.g., numbers or percentages?
 - Percentage of park visitors who rate the conservation display “Good” or “Excellent”
 - What would be a **STRONGER** measure of success?
- How will evidence of change be collected? What methods or tools are used?
 - Pre- and post-project interviews
 - Surveys and questionnaires
 - Trained observer



Personnel

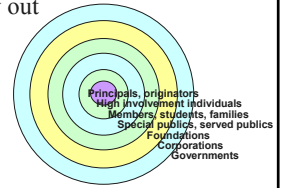


- Identify key staff and volunteers
- Explain their qualifications to do the work
- Identify other additional staff, consultants or outside resources required
- Explain their expertise and justify why they are needed
- Think through what time commitments are needed

Continuation/Sustainability

Will the project continue beyond the original grant period or does it have a logical endpoint?

- How will it be sustained?
- Why are *you* the group to carry out the project?
- Will any community groups be partnering with you?



Future Funding

What are your plans to secure funding to sustain or expand the project beyond the initial funding request if needed?

Hint: The answer is *not* “additional fundraising”!



Potential Barriers

What are major challenges to successful implementation?

Tip: Identify strategy to deal with potential barriers.



Evaluation



- How will you know if you are successful?
- Who is going to evaluate the project?
- How will you know if the project is accomplishing what was intended?
 - Build benchmarks and outcomes data into the project activities.
 - Make data collection simple and easy to analyze.

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Getting it Down on Paper – II The Letters ... The Proposals



Sharon Leighty, Executive Director,
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Grants – The ABCs of the Written Words

- Letters of inquiry
- Cover letter
- Budget
- Full proposals



Letter of Inquiry – Basic Elements

... the whole project...in 2 pages or less!

- Introduction
- Organization description
- Statement of Need
- Methodology
- Funding sources and requests
- Concluding summary

Sample Letter Of Inquiry

...see Handout

Letters of Inquiry - Considerations

- First impressions count!
- Letterhead – board list
- Who signs? ...President, not staff
- Final review/proof carefully!

Proposal Cover Letters

- Almost always included with proposals
- Key communication – what if funder doesn't read the full proposal?
- Think about the messages conveyed:
 - Professional appearance
 - Grammatically correct, no typos or spelling errors
 - Includes the basic elements of the letter of inquiry
but in one page with lots of white space

Sample Cover Letter

...see Handout

Budgets – Talking About Money *and* Resources



- Funders often have very specific requirements and formats
 - Organizational budget
 - Project budget
 - Spreadsheets *and* narratives – both are important
- Attention to details – make *sure* the numbers balance!
- Show pending, raised and in-kind support
- Be realistic with your numbers – research carefully!

Sample Organization Budget

...see Handout from “Nonprofit Guides”

Sample Project Budget Pages

...see Handout

Not for Procrastinators Only: Getting Started



- Commit your ideas to paper
 - Thoroughly describe your program
 - State your goals and objectives clearly
 - Construct a timeline
 - Estimate costs for staff, materials, and equipment
 - Build in evaluation as a part of the project
 - Write job descriptions for key volunteers and staff
- The discipline of getting these points down on paper, is, in itself, a valuable organizational development effort

Proposal Elements – Part I

- Summary – clearly and concisely summarizes the request.
- Introduction – describes the agency’s qualifications or “credibility”.
- Statement of Need – documents the needs to be met or the problems to be solved.

Proposal Elements – Part II

- Objectives – establishes the benefits of the project in measurable terms.
- Methods – describes the activities to achieve the desired results.
- Evaluation – presents a plan to determine the degree to which objectives were met and procedures were followed.

Proposal Elements – Part III

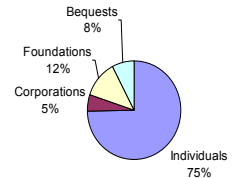
- Future funding – describes a plan for continuation beyond the grant period and/or availability of other resources.
- Budget – clearly delineates costs to be met by the grant.

Proposal Writing Tips

- Use active rather than passive voice.
- Do not use jargon or acronyms unless absolutely necessary. If you do, explain fully.
- Use simple sentences, keep paragraphs short, employ headings and subheadings.
- Write your proposal from the point of view of those who will benefit from it. Talk about their needs and how your program will help.
- Examples – www.fdncenter.org/learn/shortcourse

“Matchmaker, Matchmaker...” Finding a Funder

- Individuals – the backbone of any campaign
- Foundations
 - Private
 - Community
 - Company-Sponsored
- Corporate giving programs
 - Direct giving, cash, or in-kind



Source: *Giving USA 2001*, AAFRC Trust for Philanthropy

Prospecting for Possibilities – Individuals

Collect:

- Contact information
- Employer
- Board affiliations
- Civic/volunteer interests
- Giving history – both to your organization and others
- Connection to organization – “threads”



Prospecting for Possibilities – Foundations and Corporations

Create a list of funding prospects:

- Sortable table or spreadsheet
- Develop a prospect worksheet – what do you need to know? (see [sample](#))
- Organization of directories:
 - Subject, geographic, types of support



How it Looks from Their End... What Funders Seek in Their Grantee

- Evidence that the organization is well-known and well-regarded
- Organization addresses an existing need
- Evidence of funding from a variety of other sources
- Demonstrated sound fiscal management and realistic budgeting
- Strong, involved, board members
- Committed volunteers
- Qualified staff and/or volunteers



Where are the Gold Mines? ... in the Mountains of Data!

- Foundation Center Directories and Databases
- Foundation publications – guidelines, annual reports
- Community Resources
- Internet resources
- Library collections and resources
- Your colleagues, friends, and the world around you – be creative!



Foundation Directories and Databases

- Foundation Center Resources www.fdncenter.org
 - Foundation Finder
 - FC Search (subscription service – most libraries have)
 - Foundation Directories – see handout for sample foundation entry
- National Directory of Corporate Giving
- Oregon Foundation Databook
www.foundationdatabook.com



Getting on the “Horn” ... Making the Foundation Call

Small Group Breakout Session – Groups of Four – See Handout

- Foundation Director
- Organization Volunteer
- Staff or Board Member of Organization
- Observer



Getting on the “Horn” ...Making the Foundation Call

Trust Management Services

- Take five minutes to prepare for call
- Role play the call for about five minutes
- Observer comments
- Group discussion about what went well or not so well



Larger Foundations Protocol and Etiquette

- Generally publish guidelines that specify whether to approach by phone or letter
- Allow 6-8 months for decision – not a “quick fix”
- Attachments
- Communication and protocol especially important
- Grant reporting



You Got the Grant... Now What?



- Thank immediately – personally and letter
- Review and respond to grant conditions and contracts
- Draft a news release – get quotes from funder
- Set up plan for grant reports
- Submit timely grant reports
- Include required information and photos
- Invite funder to “hard-hat” tours, events, etc.
- Prepare a thoughtful final report

Additional Resources



- For more information on grantseeking, grantwriting, and **links** to useful web sites, visit:

www.clarogroup.com

and click on **Nonprofit Links**

- Other sites mentioned today (Guidestar, Foundation Center, etc.) are linked from here.

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