Planning and Preparing
You Have a Great Idea...Now What?

- Identify your problem
- Identify possible activities, programs or materials needed to solve the problem
- Ask around: co-workers, community, parents, other childcare colleagues
- See if others have knowledge, contacts, materials, experience
Beef It Up

• Estimate the Costs
  – Can it be done with existing staff or volunteers?
  – Is any special training needed?
  – What materials are required? What would be “nice to have”?
  – Other costs?
• Details not needed yet, but scope of the project leads to the strategy
Talk It Up

- Learn from others, but don’t let someone else’s pessimism bring you down
- Getting permission: for the idea, for the fund raising
- Timing is important
- Is it feasible, if you had the money?
- What are the biggest barriers to implementing your idea?
Plan your Funding Strategy

- When would you start?
- How much time do you have to raise the $$$?
- List all possible TYPES of sources for cash or in-kind support: parents, community, schools, volunteers, businesses, foundations
- How much time and effort are you willing to commit?
Plan A . . . Plan B . . . Plan C

- Low-hanging fruit?
- Who can help you raise money?
- Can the children and youth help? Parents?
- What do you like to do? What are you unwilling to do?
- What is your backup plan?
Your Job?

- To convince a group of strangers (sight-unseen) to give you their money to carry out a program that you believe is important
Writing the Proposal
The Ideal Flow

• State the need
  – “This group knows what they are talking about.”

• Identify the solution you offer
  – “Gee, that could really make a difference.”

• Present your plan
  – “OK, we see what they need to do”

• Back up with details
  – “That makes us confident they can really do it”
Mindset – Think Like the Funder, Not Like Your Organization

- What does the funder want? – not – what does your organization want to deliver?
- What language does the funder understand and appreciate? – not – are these the terms and acronyms we are accustomed to using?
Proposal Elements

- Problem statement/needs assessment
- Proposed solution/goals and objectives
- Project description/methodology
- Organization description/qualifications/resources
- Timeline
- Evaluation
- Budget and budget justification/narrative
State the Need

- What problem in the community does your organization/project address? – not – what problem does your organization have?
  - Identify the target population.
  - Use local statistics for local projects.
  - Documentation: charts, graphs, survey results, anecdotal information
  - Tell a story about a person.
  - Who else is working on this problem, and where are the gaps?
- Give the reader hope
Identify Your Solution - Project Goal

- How will you approach the need?
- What is your goal?
  - General statement regarding how target population will change as result of your project
- What difference will you make as a result of this work?
- Don’t promise more than you can deliver
Goals

Goals: Broad statements reflecting ultimate results of accomplishment.

– Increase children's desire to be physically active
Objectives are “SMART”

Objectives: What you will do to accomplish goal
- Specific – What precisely are you going to achieve?
- Measurable – Can you quantify your objectives?
  - How much change is desired?
- Achievable – Are you attempting too much?
- Realistic – Can you make it happen?
- Time-bound – how long will it take?
SMART Objectives

Specific, Measurable Achievable  Realistic Time bound, Realistic– Provide fun physically active games for all children two times per day, every day

• Activities - Specific Realistic Tasks or Strategies
  – Research and provide fun physical activities using the ___resource.

• Outcomes – Specific Measureable Achievable  Realistic Time bound change as a result of project.
  – 85% of participating students exhibit excitement about being physically active by June 30, 2013.
Present Your Plan - Project Activities and Timeline

- What are you going to do? What activities are included?
- Directly tied to the stated goals and objectives
- Be as concrete as possible
- When? For how long?
- Include numbers when appropriate:
  - How many students will benefit? How will they benefit? How will you know it’s successful?
  - How many teachers/volunteers?
Project Description/ Methodology

- Describe activities to be undertaken and why
- Flows naturally from problem and proposed solution
- Describe activities, staff needed, and other resources
- Provide evidence of planning and preparation
- Reasonable scope
Timeline

- Describe sequence of activities or major steps of your project
- Let reviewers know you have done significant planning
- Can use time and task chart (visual)
Organization Description/Qualifications

- Demonstrate to the reviewer that you are capable of doing what you propose
- Describe your qualifications & expertise
- Describe organization, its purpose, goals & programs, & project administration
- Other available resources, including collaborators or other key personnel, & technical resources
- Offer supporting evidence or endorsements
Calculating
Regardless of the amount of funding requested, you need a detailed budget and sometimes a budget narrative.
Present Your Plan -

Staffing, Partners, Budget

- What resources do you need to fulfill your plan?
  - Staff/volunteers
  - Partner organizations
  - Materials
  - Training
  - In-kind donations
  - Cash
Present Your Plan – Budget

- **Income**
  - ALWAYS balance with expenses
  - This proposal “under consideration”
  - Other grants (under consideration, committed, to be submitted)
  - Other sources (general operating funds, individual donations, fees for service)
  - Include in-kind contributions
Budget Principles

1. **No mistakes!** (at least 3 proofers)
2. Consistent format – numbers, dollar signs, decimals, commas
3. Ask for enough, but *just enough.*
4. Clearly justify your figures with **real** estimates, travel locations, mileage, salaries (no estimates).
5. Tell your story. If someone cannot understand your project from reading your budget, start over.
6. Include **ALL** project costs, internal contributions, partner contributions, and plans for sustaining the project.
Sample Budget Justification

- **Project Leader, Ms. Mary Smith** – The budget request is for 156 hours (26 weeks x 6 hours per week) for the project leader @ $16 per hour to oversee the project. Total cost of $2,496.

- **Physical Activity Supplies** –
  - The budget request is for 10 Acme PA Kits (1 for every 2 students) @ $38 each and 3 CD sets @ $52 each. Total cost of $536.
Evaluation and Expected Outcomes

- What outcomes – changes in the target population – will result?
- How will you know if these outcomes were achieved - what measurement tools will you use?
- This becomes your outline for reports if the grant is funded
- Donors give to the future, not the past
Evaluation Plan

• **Process (formative)**
  - Provide feedback along the way so changes can be made;
  - Usually qualitative.

• **Product (summative)**
  At the end:
  - Were objectives met?
  - Was new knowledge gained?
  - Was it cost effective?
  - Usually quantitative
Review Process

Reviewers look for:

- A “doable” project (resources, approach)
- A project worth doing
- An **easily-read**, accessible proposal
- Clear: easy to follow, logical ideas
- Complete: includes all required items
- Consistent:
  - Internal: parts consistent with each other
  - External: recognize accepted ideas of the field
Summary

- Project planning is key
- Project should fit overall goals or plan
- Choose potential funders with a good fit
- Write with reviewers in mind
- Budget should fit your project plan
- Don’t despair if proposal is unfunded