RARE Participant
Grant Writing Presentation

DECEMBER 13, 2018

HELLO AGAIN!
What will we be doing, today?

☑ Principles of Sustainable Budgeting
☑ Budget Activity
☑ Grant Writing Elements
Project Planning - Permission to Proceed

1. Discuss the use of the PPPP document with your organization
2. Draft a PPPP document
3. Send it to Meredith for review, if desired: Meredithleehowell@gmail.com
4. Share the PPPP document with your organization
financial statements

versus

budgets
Budgets plan “work to be done”

- Time
- Resources
- Scope
What will your organization be doing in one year? In three years?
What does your organization hope to accomplish?

What are you capable of doing?

What is needed and feasible?
Mission and strategic planning define work to be done:

“work to be done”
Outputs of a strategic plan:

1. Identify “work to be done”
2. Prioritize activities
3. Develop staffing plan(s)
4. Develop funding plan(s)

Revenue
Expenses
Organizational Budgets

Resource plans for “work to be done”

We have to effectively show all of these elements in our budgets.

- Capacity to do programming
- Capacity to sustain efforts
- Financial support for work
An organizational budget should tell the resource story of the organization in enough detail to be able to duplicate the effort.
Grant writer’s **lens** of the organizational budget:

- 3 grants submitted
- 2 grants awarded
- 1 grant denied
Sustainability = balanced long-term approach
Future Scenarios

What does your organization hope to accomplish?

What are you capable of doing?

What is needed and feasible?
Future Scenarios

What does your organization hope to accomplish?

What are you capable of doing?

What is needed and feasible?
Future Scenarios

What does your organization hope to accomplish?

What are you capable of doing?

What is needed and feasible?

Past Present Future
What does your organization hope to accomplish?

What are you capable of doing?

What is needed and feasible?
Sustainable Budgeting

1. **Keeps in mind long-term environmental/organizational change while developing short-term “work to be done”**

2. **Uses different forms of budgeting for different applications**

3. **Directed (and understood) by Board of Directors**
"Fundability" of Type of Expense:

<table>
<thead>
<tr>
<th>Fundraising</th>
<th>Admin</th>
<th>Existing Programs</th>
<th>New Programs</th>
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<tbody>
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Fundability of Expense
**General “flexibility” of Revenue Types:**

<table>
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<th>Revenue Type</th>
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<tbody>
<tr>
<td>Unrestricted grants</td>
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<td>Businesses &amp; Sponsorships</td>
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<tr>
<td>Restricted grants</td>
</tr>
</tbody>
</table>

Flexibility of Use
Matching “fundability” with “flexibility”:

<table>
<thead>
<tr>
<th>Revenue Type</th>
<th>Fund raising</th>
<th>Admin</th>
<th>Existing Program</th>
<th>New Program</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unrestricted grants</td>
<td>XXX</td>
<td>X</td>
<td></td>
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<td>X</td>
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</table>
Funding Plan for a New Program

- Start-up program grants 33%
- Organizational investment 33%
- Community Support 33%
Funding Plan for a Continuing Program

- Program grant(s) 15%
- Operating grant(s) 15%
- Organizational investment 25%
- Community Support 45%
Funding Plan for a Mature Program

- Program grant(s) 0%
- Operating grant(s) 20%
- Organizational investment 0%
- Community Support 80%
Building an *Organizational Funding Plan* that helps create Program Sustainability

(see handout)
Budgets; types and templates

- Basic
- Basic with in-kind
### Scenario 1: Basic Budgets for Small Organizations

<table>
<thead>
<tr>
<th></th>
<th>2018-2019 amounts</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Revenue</strong></td>
<td>$25,000</td>
</tr>
<tr>
<td><strong>Expenses</strong></td>
<td>$26,000</td>
</tr>
<tr>
<td><strong>Excess of Expenses over Revenue</strong></td>
<td>($1,000)</td>
</tr>
</tbody>
</table>

Whether or not your budget must be balanced depends on your budgeting procedures.
### Scenario 1: Basic Budgets with in-kind

<table>
<thead>
<tr>
<th></th>
<th>2018-2019 Cash</th>
<th>2018-2019 In-kind</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Revenue</strong></td>
<td>$25,000</td>
<td>$15,000</td>
</tr>
<tr>
<td><strong>Expenses</strong></td>
<td>$26,000</td>
<td>$15,000</td>
</tr>
<tr>
<td><strong>Excess of Expenses</strong></td>
<td><strong>($1,000)</strong></td>
<td>0</td>
</tr>
</tbody>
</table>
Scenario 1: Basic Budgets for Small Organizations

Scenario 1: Example

(Water Valley Food Bank)
Strategies for Developing Project Budgets
Budget Activity

Build a Compelling Project Budget Activity
Your job is to create a compelling project budget that will:

1. Allow you to complete the project
2. Maximize the fundability of the project
Expenses

Building Compelling Expense Budgets

1. Include all costs to complete the project (grant reporting, administration, installations, etc.)
2. Ask for cost estimates before you submit the grant
3. Sometimes it is OK to have contingency
Revenue Sources

Create at least four revenue sources using the following criteria:

1. Chose at least one foundation that you hope will support the project
2. Include at least some applicant cash
3. Include some form of applicant in-kind
4. Include some form of collaborator cash or in-kind
In-kind

Building Compelling Budgets

1. For every in-kind revenue, you must have a corresponding expense (the amounts must balance)

2. Provide enough information to give the donor full credit for their donation

Mabel Bell, Volunteer
Donated grant writing services
16 hours x $15/hr = $240
Strategy for Funding Operating Expenses
## Scenario 2: Split by Programs

<table>
<thead>
<tr>
<th></th>
<th>Revenue</th>
<th>Admin</th>
<th>Program A</th>
<th>Program B</th>
<th>New Prog</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Expenses</strong></td>
<td></td>
<td>$110,000</td>
<td>$90,000</td>
<td>$55,000</td>
<td>$45,000</td>
<td>$300,000</td>
</tr>
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<td><strong>Revenue</strong></td>
<td>$110,000</td>
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This format gives more detail about how resources will be distributed.
### Scenario 2: Operating Split by Programs

<table>
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<th>Revenue</th>
<th>Program A</th>
<th>Program B</th>
<th>New Program</th>
<th>Total</th>
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<td><strong>Total</strong></td>
<td>$90,000</td>
<td>$55,000</td>
<td>$45,000</td>
<td>$190,000</td>
</tr>
<tr>
<td><strong>Admin</strong></td>
<td>$36,666</td>
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<td>$110,000</td>
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<tr>
<td><strong>Total</strong></td>
<td>$126,666</td>
<td>$91,666</td>
<td>$81,666</td>
<td>$300,000</td>
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- Admin split evenly by Projects
Scenario 2: Budget by Programs

Example:

(Western Region Food Partnership)
Your work

Your Own Funding Plan

• Guesstimate how much your project will cost

• What sources of revenue do you plan to raise in addition to the grant funding you are seeking?
Your Work

Your Own Funding Plan

• What collaboration and/or joint work can you show in your project budget?

• How will you represent in-kind resources in your proposal; budget or narrative
Writing Elements

What makes a project compelling?
Storytelling

Once Upon a Time

Protagonist

The End
Storytelling

Once Upon a Time

Protagonist

Antagonist
Storytelling

Once Upon a Time

Conflict Resolved

The End
It’s like a Story

Needs Statement

Project Description

Outcomes
There should be a logical sequence:

**Needs Statement** – Pre-existing condition that needs changing – “the conflict that compels the reader”

**Project Description** – “Rescues the Need”

**Outcomes** – “Expresses Change” that will happen as a result of the Project
Writing Elements

Needs Statement:

The unacceptable pre-existing condition that needs changing is...
Needs Statement:

Effective *Need Statements* include both “big picture” ideas and “attention to detail”
Writing Elements

Needs Statement:
“big picture” ideas
Needs Statement:

Effective *Need Statements* include “attention to detail”
Goals (Outcomes):

How you will positively affect the world and change lives?

How will the future look “happily ever after”?

Start with a Verb

(i.e. increase, decrease, expand access to)
Tourism Impacts

✓ Increase number of visitors
✓ Increase money spent during overnight trips
More Examples

- Increase number of visitors from more than 50 miles away
- Increase accessibility to the river
- Expand the number of events that cater to visitors
- Promote Jackson County as a world-class tourist destination
Writing Elements

Goals (Outcomes):

1. Brainstorm a list of several potential Outcomes for your project
Goals (Outcomes):

2. Decide which outcomes are the best ones to use for your project

How do you decide?
Measurable Outcomes

✓ Increase tourism
✓ Increase tourism during the shoulder season
✓ Increase tourism during the shoulder season by 30% over a 2 year period
More Measurable Outcomes:

• Double the number of visitors from more than 50 miles away that visit Central Point in October, November, and December

• Increase accessibility to the river by providing three addition boat launch sites

• Promote Jackson County as a world-class tourist destination to Willamette Valley and Portland Metro visitors
Writing Elements

Sustainability

1. Financial Plan
2. Staffing Capacity
3. Unmet Need
4. Community Partners
Writing Elements

Sustainability

What financial plan do you have to sustain your project well into the future?
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Writing Elements

Sustainability

What **staffing capacity** does your organization have to sustain these new efforts?
Sustainability

Will the need continue? The unacceptable pre-existing condition . . . What leads you to believe this?
Writing Elements

Sustainability

How will community support/partnerships build to decrease your reliance on grant funding?
Thank you