





## Worksheet 2: Project Plan and Funding Prospect Assessment Tool

### Step One: Project Plan Worksheet (1A and 1B)

Background	
Goals	
<b>OUR PROJECT TITLE</b>	
1. Populations of interest	
2. Geographic area of interest	
3. Measurable outcome objectives that describe change in populations of interest	
4. Broad strategies (e.g. policy development, skill building, education, arts appreciation)	

## Worksheet 2: Project Plan and Funding Prospect Assessment Tool

<p>5. Specific activities (e.g., festival, a mass media campaign, a workshop, an event)</p>	
<p>6. Resources required (e.g. facility needs, equipment, materials/supplies, staffing, volunteers)</p>	
<p>7. Timelines or schedule of events</p>	
<p>8. Evaluation indicators (e.g. feedback, assess, inventory)</p>	
<p>9. Other project notes</p>	

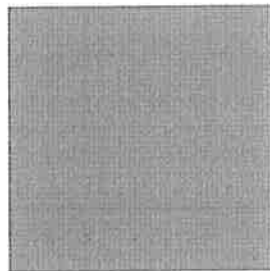
## Worksheet 2: Project Plan and Funding Prospect Assessment Tool

### NOTE TO USER:

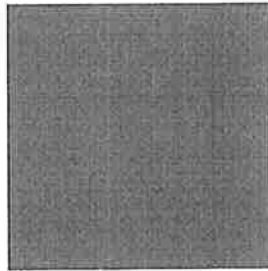
The key to using this project map and funding tool is to lay these two sheets (Steps 1 and 2) next to each other to develop the "fit" score. This way they can be separate, but compatible.

To allow more room for adding information, each work book may have to be more than one page long. That works as long as they can be matched together in hard copy for comparison. There is an approximate amount of room to fill in each category on worksheet 1A and 1B, and 2A and 2B. Page 1A goes beside 2A, and 1B beside 2B. See map below for layout recommendations.

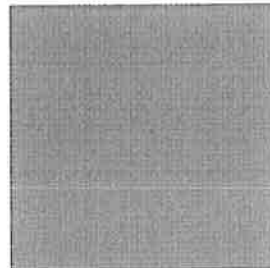
Step 1, A



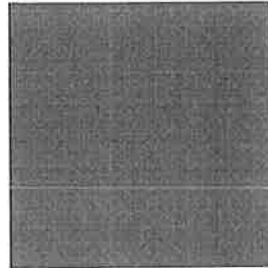
Step 2, A



Step 1, B



Step, B



## Worksheet 2: Project Plan and Funding Prospect Assessment Tool

### Step Two – Funding Prospect Assessment Worksheet (2A and 2B)

Funder name			
Funder address			
Contact person			
Previous history with organization			
FUNDER INTERESTS			
		Fit Score 1-5 1 = Poor 5 = Excellent	Notes
Population of interest			
Geographic area of focus			
Outcomes/topics of interest			
Strategies of interest			

## Worksheet 2: Project Plan and Funding Prospect Assessment Tool

Activities of interest			
Resources			
a. Range of grants			
b. Restrictions on use of funds (e.g. staffing, types that qualify, etc.)			
Timelines			
a. Period of funding			
b. Proposal requirements			
c. Proposal deadline			
Project evaluation expectations			







# Worksheet 3: Asset Inventory Tool

## ACCOMPLISHMENTS

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4. What are your ongoing core projects or programs and what are the results or outcomes that you can point to as a result of these efforts?

PROJECTS/PROGRAMS	RESULTS/OUTCOMES
a.	
b.	
c.	
d.	
e.	

5. What are the core competencies (e.g., skills and abilities) that enable your organization to succeed in these efforts--personal or organizational or both?

## **Worksheet 3: Asset Inventory Tool**

**6. How do you endeavor to measure your effectiveness? (e.g., statistics; letters of appreciation, testimonials, assessments by outside bodies, awards and honors, etc.)**

**7. Do you attract any media visibility? If yes, in which media outlets?**

### **BOARD AND STAFF HISTORY/BIO**

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**8. What are some of the key qualifications and talents of your past and current board members and staff?**

**9. Have board or staff members received any recognition of their talents and contributions?**

## **Worksheet 3: Asset Inventory Tool**

**10. What percentage of your board members make financial contributions to your organization?**

### **ORGANISATIONAL HISTORY**

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**11. How long has your organization been in existence?**

**12. What distinguishes your past work from that of similar organizations? List the specific ways in which your work differs from theirs.**

**13. What recognition has your organization as a whole received since its inception? (e.g., invitations to speak at conferences, workshops, public rallies, and legislative hearings; certificates of commendation; quotations in magazines; letters of appreciation; etc.)**

## Worksheet 3: Asset Inventory Tool

### FUNDING HISTORY

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14. Name the institutions that support your work.

a. Government agencies:

b. Foundations:

c. Corporations and businesses:

d. Associations of individuals:

e. Others (e.g., labor unions, federations, governmental agencies, etc):

## **Worksheet 3: Asset Inventory Tool**

**15. How many individuals pay dues, make contributions, or do both to support your work? What percentage renew their support each year?**

**16. How diversified is your financial base? For example, how many different sources extend support to you? What percentage of your total income does each comprise?**

# Worksheet 4: Project Planning Tool

## SECTION 1: Quick Summary of Proposed Project

- 1. What's the overall goal and target audience, and why is it important?**
- 2. When will the project start?**
- 3. What are the inflexible deadlines for the project? For example: deadlines for grant applications, major holiday, end of fiscal year, major awards.**
- 4. What are the relative deadlines for the project? For example: submission of the design for posters announcing the event or hiring the facilitators for a workshop.**

# Worksheet 4: Project Planning Tool

## SECTION 2: Information on the Proposed Project

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- 1. What problem or issue makes this project important?**
- 2. What have you done to research the status of the problem?**
- 3. Can you cite CURRENT facts and statistics to support the value of the project?**
- 4. Who will benefit from this project? Be as specific as possible about your target audience(s).**
- 5. When will the search for possible funding of the project start?**
- 6. Is the project urgent – does it address a problem that requires an immediate solution?**
- 7. How, in our view, does the need relate to your programs long-term goals and mission?**



## Worksheet 4: Project Planning Tool

**8. What related work is being done by other organizations?**

**9. Does the project address a problem in a way that's better than other programs?**

**10. Is this project finite? If not, will it enable your organization to generate revenue that will support the project in the future?**

**11. Can you cite your program as a model for others of the same type? Where else would similar problems occur, and how could your results be applied?**

**12. Concluding summary: Restate why this project is worthwhile and why your organization is the best to do it; mention follow-up projects.**



# Worksheet 4: Project Planning Tool

## SECTION 4: Organizational Context for Project

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- 1. What is your organization established to do - what is its mission?**
- 2. What makes your organization particularly qualified to succeed with this project?**
- 3. Who is the target audience of your organization? If relevant, cite the demographics of the target audience, community, and/ or city.**
- 4. Who's on the board of directors, and what are their affiliations?**
- 5. What are the qualifications of key players in the organization for this project?**
- 6. Who will be responsible for administration of the project, i.e. budget management, overseeing objectives, and reporting?**
- 7. How do you recruit members or volunteers to get them excited and involved?**



# Worksheet 4: Project Planning Tool

## SECTION 5: Executive Summary

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**Adjust this as appropriate for each source of funding that you apply for.**

**Explain BRIEFLY, in one paragraph:**

- 1. The problem and why it's important**
- 2. The goal of this project and its target audience**
- 3. The method to be used to achieve the goal**
- 4. The funding required**
- 5. Why your organization is particularly qualified for this project**



# Worksheet 5: Strategic Planning Tool for Developing a Blue Print

## DEVELOPING A BLUEPRINT

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List of strategic questions that will help you to build a vision for your project and a blueprint for developing a grant proposal:

1. **What is the problem your organization is addressing?** *Remember – the problem is not your need – it is the community's need!*
2. **Who else is addressing the problem, and what are the gaps in how it is being addressed?** *Gaps can be programmatic, population, time/seasonal, or material. Gaps are the reason that you have a need!*
3. **How are you proposing to address the problem?** *Paint a clear and specific picture of your program! Can your prospect see it in action in their mind?*
4. **How will things be different/will the problem be solved or improved, when you are done? How will you know you are succeeding?** *Consider what you will use to measure this success and learn what needs to change or be adjusted.*

## Worksheet 5: Strategic Planning Tool for Developing a Blue Print

5. **What do you need in order to solve the problem?** *This must tie to the approach you have described. It's an opportunity to once again paint a picture of what you will be doing!*
  
6. **What resources do you already have? From whom?** *Don't forget volunteers, donations and in kind services. Show the community participation in your project. Project the image that funder is investing in a project that already has support.*
  
7. **What are the qualifications and experience that make your program the right one to take on this work?** *History, key accomplishments, qualifications of staff and volunteers, relationships in the community ... as they relate to the project.*
  
8. **Are there problems or barriers that you can foresee? How will you overcome them?** *We all run into roadblocks when we try something new. Think through what you are going to do carefully. What's likely to trip you up?*



# Worksheet 6: Problem and Needs Statement Activity and Tool

## ACTIVITY #1:

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In this activity, you will develop a problem/needs statement for a given case study.

What to do:

1. Review the two problem/needs statements provided on the following pages.
2. Work in a group or on your own to identify the strengths and weaknesses for each statement and to make suggestions for improvements.
3. Prepare to share your findings with the larger group or study the response included in this package.

### Example statement #1

The juvenile court in Little Creek has experienced an increase of elementary age offenders. ABC Elementary reported an increase of 87 referrals during the 2010-2012 school year. The most common offenses were Battery (29 citations) Petty Theft (22 citations), and Disorderly Conduct (20 citations). The majority of the offenses occurred during the school hours, or just before or after school.

There are many resources in the community and at the school that would help kids and families learn ways to address the problem. In far too many case, however, the parents are not motivated to take advantage of the resources offered to them. The school's best intentions still lead to a lack of motivation by the parents to hold themselves accountable if they choose not to participate in counseling or parenting classes. The disruptive and delinquent behavior continues because the family dynamic does not change. Eventually, the child is cited into juvenile court in an attempt to control the behavior. This puts the focus on the child and his/her behavior and less on the issues in the family system that are helping to create and sustain the dysfunction. Many of the resources traditionally used by the juvenile justice system are not geared for kids as young as 7, 8, and 9 years old.

There is currently no program in place other than juvenile court to address the problems that exist within the family—especially when the family is not motivated to follow through. Law enforcement diversions are typically token and not based on a family assessment. Most of the terms and conditions do very little to address the family dynamics that cause the dysfunction. Behavior Group Conferencing would address this problem by bringing key people together who know the family, who understand resources available in the community, and who would provide the motivation and the follow up to see the family is using these resources to pro-actively address the issues.

# Worksheet 6: Problem and Needs Statement Activity and Tool

## Example statement #2

While developing its 3-year strategic plan, Little Creek Community Association identified a growth of working young parents in the jurisdiction. The Association recognized that the community also has older, retired adults among them. The Association recognized the need to offer support to the young families residing in the community. The Association Chair identified a local community group that was capable of providing support to these two intergenerational groups. Therefore, the community group sought funding from the local United Way and submitted a proposal to provide an intergenerational parenting program.

## Activity #1 Worksheet

Identifiers	Example #1	Example #2
Strengths		
Weaknesses		
Suggestions for Improvement		

# Worksheet 6: Problem and Needs Statement Activity and Tool

## Example #1

### Strengths:

This is a fairly strong Need/Problem statement that identifies a growing “delinquency problem in elementary age children, along with indicators that the family dynamic/dysfunction is a contributing issue to the problem. The statement clearly indicates the problem, the effected demographic and to contributing factors.

### Weaknesses:

The statement does not indicate what may be causing families to be apathetic. No indicators are included to point out that the families may be single parent, economically challenged or lack other resources that would make them more eager to participate. Nor does the statement indicate that these factors may be contributing to the problem.

### Suggestions for Improvement:

Adding some indicators of what may be causing the familial apathy or citing findings that indicate what the apathy might be would strengthen the need statement.

## Example #2

### Strengths:

The only strength is in pointing out a growing demographic of young families and seniors in the area, and support for these groups from a local association and the United Way.

### Weaknesses:

This statement is lacking in detail, focus and corroborating data. Growth in young families and in older, retired members of the community is cited. Although intergenerational support is brought up, there no indication of what significance this might have within the community or what benefits an intergenerational program may offer. Although intergenerational support might be of use to both of these growing demographics there is a lack of detail in helping the reader understand what the problem is or why it is important to bring these groups together.

### Suggestions for Improvement:

The statement would be improved vastly by explain the needs or problems faced by both of the cited demographics. What the significance is of these two groups? What problems do they face? And how would they benefit by being brought together through a program (i.e. educational, economic, social value). Although there are two organisations who want to tackle the “problem” (whatever that may be), there is no indication of why, how, where or what stake either group has in this endeavor.

# Worksheet 6: Problem and Needs Statement Activity and Tool

## ACTIVITY #2

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### Statement of Need Questionnaire

The tables following this worksheet contain sample answers to these questions. Please use it as a reference as you complete this questionnaire for your own project or organisation.

Who? Where? When?	What? Why?	Evidence of Problem	Evidence of Problem
People, animals, environment or a community?  Where are they located?  When is the need evident?	What is the need?  Why does this need occur?	What evidence do you have to support your claim?	What evidence do you have to support your claim?

## Worksheet 6: Problem and Needs Statement Activity and Tool

Who? Where? When?	What? Why?	Evidence of Problem	Evidence of Problem
<p>Senior Immigrant adults—both single and family integrated.</p> <p>Within our service area of Some Town, Rural, Saskatchewan.</p> <p>When these individuals have no “medical home,” when they can’t manage their chronic illnesses, and/or when they are socially isolated.</p>	<p>No senior services offered with translation or cultural sensitivity which results in access issues.</p> <p>Healthy and vibrant seniors without access to or knowledge of services that can significantly increase their quality of life.</p> <p>No other organizations serve this senior population.</p> <p>Many in this segment are living at or below the poverty line and cannot access such services elsewhere.</p>	<p>Town has rapidly growing older adult population; population has doubled since 1990 and is expected to double again over the next two decades.</p> <p>Town, 35% of Immigrant older adults reported income below the poverty level.</p> <p>Our center serves older adults in rural area with highest concentrations of low-income, immigrant, older adults. The area has largest immigrant population in province.</p> <p>An alarming number of immigrant seniors are increasingly being diagnosed with diabetes that is going untreated or without changes to lifestyle including diet, exercise and education.</p>	<p>A minimum of 50 Immigrants seniors with diabetes will participate in our Food Fun &amp; Fitness program to maintain stabilized blood sugar levels for three months.</p> <p>The immigrant seniors who access the services of our center for the first time will increase by 40%.</p> <p>50 Immigrant seniors in our multicultural food cooking class will learn to cook healthier versions of the meals they love.</p> <p>Our referrals of immigrant seniors in will increase by 50%.</p> <p>Our mission is to help seniors improve and maintain a healthy and independent lifestyle and to maximize their quality of life.</p>



# Worksheet 7: Goals and Objectives Tool

## Goals and Objectives Exercise

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Fill out one worksheet per goal:

**GOAL:**

	Objective 1	Objective 2	Objective 3	Objective 4
Direction of change				
Area of change				
Target population				
Degree of change				
Time frame				





# Worksheet 8: Proposed Project Budget Assessment Tool

Proposed Project Budget

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## PERSONNEL/STAFFING COSTS:

1. What is your budget for the current fiscal year? What is your budget for the next fiscal year?
2. What personnel from your current staff will work on the project? What is their expertise? What will their responsibilities be? What will their salaries be?
3. What additional administrative staff are necessary for this project? What expertise must they have? What will their responsibilities be? What will their salaries be?
4. What consultants and/or experts are necessary for this project? Are they available to work on it? What will their compensation be?
5. How many volunteers will work on the project? What are their qualifications, and what will their tasks be?
6. What are the total personnel expenses for this project?



# **Worksheet 8: Proposed Project Budget Assessment Tool**

## **PRIORITIES, IN-KIND AND SOURCES OF FUNDING:**

**13. What are the top priorities in the budget – the essentials without which the project can't proceed?**

**14. What items in the budget are desirable but not top priority? How much would the budget be reduced if these were eliminated?**

**15. Can any expenses be covered by donations in kind: for example, office space, performance space, equipment, food, Net access?**

**16. What are the possible sources of funding in cash for this project, including foundations and corporate sponsors?**

**17. Will the project bring in any revenue, for example from ticket sales? If so, how much?**

**18. Is the project sustainable, which means: Will it eventually generate enough income to run on its own, without outside funding?**

