



# Strategies for Effective Proposal Writing

Ontario Healthy Communities Coalition  
Coalition des communautés en santé de l'Ontario



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# Foreword

The Ontario Healthy Communities Coalition is pleased to present the third edition of our resource guide: *Strategies for Effective Proposal Writing*. Whether you are nervously anticipating writing your first grant proposal or are a seasoned grant-writer, it is our hope that this manual will assist you in developing a persuasive and fundable proposal.

Originally developed as a companion resource for our workshops on writing effective proposals, this manual has evolved into a resource that can also be used on its own. It provides some guidelines to help your organization decide whether to apply for funding and a step-by-step process by which to proceed.

The content of this guide has been derived from numerous sources, including various proposals that have been prepared by OHCC staff. Where appropriate, references for sources have been included.

It is important to remember that just as every community is different, so too are funders. Your own research is critical in developing suitable funding contacts in your area and to tailoring your approach appropriately.

We wish you every success in your efforts. Let's get started!

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# I. Introduction



## The Funding Environment

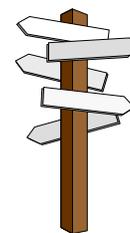
- This is a very challenging time to raise funds for non-profits, charities and community organizations.
- Increased competition due to the many new organizations being created and government cutbacks at various levels mean greater demands on foundations, corporations and other funders. Lower interest rates have resulted in smaller grant budgets for foundations. There is also increased competition for revenue from other types of fundraising (i.e. special events, online auctions, lotteries, etc.).
- Increasing demand for grants means that funders are becoming more focused, especially in the following ways:
  - ❖ a strong desire to make every cent count
  - ❖ requirements for increased accountability are becoming more stringent (i.e. internal book-keeping and auditing processes, formal organizational structure and evaluation practices)
  - ❖ increased emphasis on effective governance and management (i.e. competence, being fiscally sound and proof of long-range planning)
  - ❖ increased emphasis on project-specific funding
  - ❖ expectations that groups who have similar objectives will work together to:
    - share resources and expertise
    - minimize duplication
    - bring all the right people to the table to increase the potential for successful project outcomes
    - greater emphasis on sustainability
    - requirements for cross-sectoral collaboration.

## Types of Funders

There are many different types of funders; but most can be divided into four main categories:

- a) Government: Many federal, provincial, regional and local government ministries and departments have community funding programs
- b) Foundations: Community, corporate and family foundations provide grants for projects within their specific areas of interest.
- c) United Way: While most United Ways provide funds to their member agencies, some have community funds for new initiatives.
- d) Service clubs (e.g. Lions, Rotary Club, Shriners): Service clubs generally raise funds to support community facilities or services but have been known to contribute to other community projects as well.

## II. Laying the Groundwork



### Do Your Homework

We cannot stress enough the importance of being prepared and doing your research thoroughly *prior* to developing your proposal. You need to have a clear understanding of your goals and objectives and match them with potential funders.

#### Identify compatible funders:

- areas of interest
- geographical location
- target populations
- type and size of grant
- type of funding
- eligibility.

#### Research your prospects:

- Which funders are most likely to fund a program such as yours
- What are their funding objectives?
- What have they funded in the past?
- What are their funding guidelines?
- What are their backgrounds and interests?
- If it is a corporate foundation, what do you know about the corporation?
- Who do you need to speak to?

By doing this research ahead of time you could save yourself, and the potential funder, valuable time and effort.

#### Track your contacts:

It is very important to keep track of all your contact information. It often works best if you keep it in one place as you are doing your research and your community relationship building.

The chart on the following page may help you to organize this information.

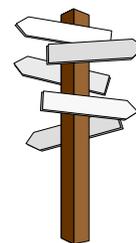
## Worksheet #1: Contact Chart

A. Funders					
Name	Organization	Contact Info	Date Contacted	Comments	
1					
2					
3					
4					
B. Community Partners					
Name	Organization	Contact Info	Date Contacted	Written Agreement	Letter of Support
1					
2					
3					
4					

## Make a Personal Connection

Develop a relationship with your top prospects. Depending on the funder, this can take many forms:

- writing a letter of introduction, accompanied by information about your organization
- making a phone call
- inviting them to a special event or sending a copy of your newsletter
- enlisting a member of your board of directors, steering committee, public official or community leader to contact foundation representatives on your behalf; they may know a foundation board member and be able to provide helpful information about what the foundation is looking for.
- Be sure to study the funding guidelines in detail. Try to get feedback on whether your initiative matches the funder's mandate. Determine if they require a "letter of intent" prior to receiving your proposal.



## Are You Ready?

Readiness is an important element of a successful proposal. Funders will want to know if you are an accountable organization. The following chart will help you self-assess your strengths and weaknesses by taking a look at the "workings" of your organization.

- Why does your organization exist?
- Who implements your goals and objectives? (the "work")
- How do you do it? Are you a formal or informal organization? Do you work well with others? Do you leverage small successes into bigger ones (i.e. dollars, partnerships, timing)?

## Program Logic Model

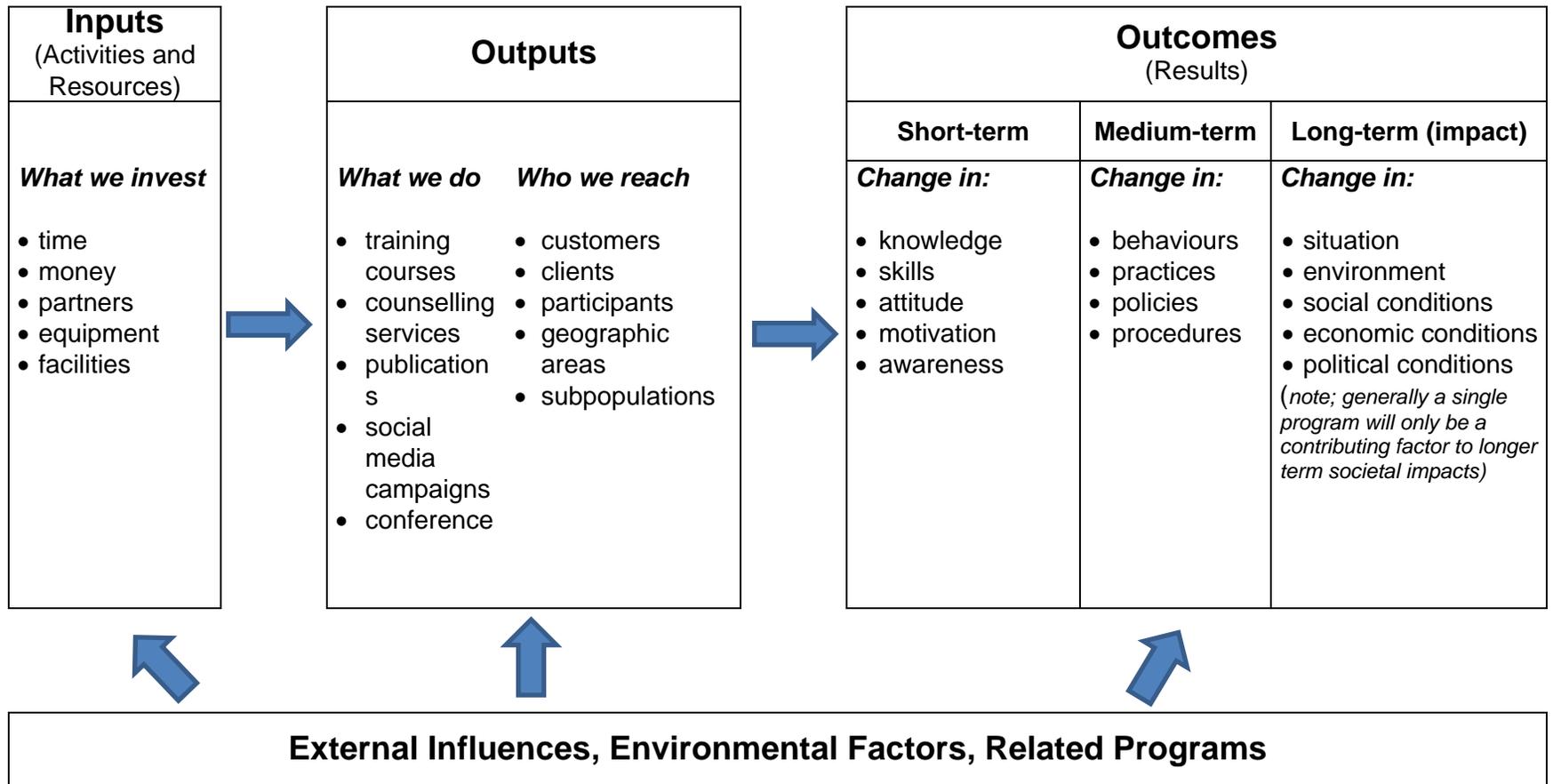
While not usually required for a grant application, a program logic model is an excellent program planning tool and can be enormously helpful to developing a grant application. Also referred to as a theory or model of change, the logic model shows the links between activities, outcomes and indicators of your initiative, and how they will contribute to broader population-level impacts.

For most programs of nonprofit organizations, the logic model answers six main questions:

1. What is the current situation that we intend to impact?
2. What will it look like when we achieve the desired situation or outcome?
3. What behaviors need to change for that outcome to be achieved?
4. What knowledge or skills do people need before the behavior will change?
5. What activities need to be performed to cause the necessary learning?
6. What resources will be required to achieve the desired outcome?

Worksheet #2: Simple Program Logic Model

**CLEAR STATEMENT OF SITUATION OR OBJECTIVE**



Worksheet #3: A Readiness Checklist

	In Place	Need	Who	By When
<b>Why?</b>				
Vision				
Mission Statement				
Values Statement				
Goals				
Programs/Services				
<b>Who?</b>				
Governance Body (Board of Directors (or Steering Committee)				
Staffing (paid and/or volunteer)				
<b>How?</b>				
Financial Information				
Strategic Plan				
Program Logic Model				
Planning Processes				
Brief History				
Service Record				
Strategic Alliances				
References				
Levers				
Other				

(adapted with permission from the Community Social Planning Council of Toronto.)

### III. How's the Fit?

Sometimes, the lure of new funding can distract us from our “work”: what we exist to do or accomplish. We need to ask ourselves if the proposed project/program is a good fit with our organization. Does it contribute to the realization of our goals and objectives? The following chart will help you honestly examine (and rate on a scale from 1 to 5) whether this is a suitable undertaking for your group.



#### Worksheet #4: Assessing the “Fit”

Item	Your Organization	The Project	Fit (1-5)
Priority Populations			
Geographic Area			
Topics / Areas of Interest			
Strategies			
Activities/Services			
Budget a) range of grants available b) restrictions on use of money			
Timelines a) Period of funding b) Proposal deadline			
Leverage/Alliances			
Project evaluation expectations			
Sustainability			
Other requirements (e.g., reporting, payroll capacity, financial tracking systems)			

## IV. Writing the Proposal

Once you are satisfied that you are indeed ready to develop your proposal and are targeting the appropriate funder, it is time to start writing.

### General Writing Tips for a Strong Proposal

- Most foundation boards prefer short, succinct proposals that show clarity of thought and purpose.
- If you don't have solid writing skills and experience, ask for help from someone who does.
- Use clear language and avoid jargon
- Ensure key goals and planned outcomes are clearly stated - get to the point early.
- Use the active rather than passive voice (e.g., "we will help street youth" instead of "street youth will be helped").
- Describe the human element of your project instead of concentrating on theoretical ideas.
- Don't leave readers to assume anything.
- Be honest about your organization's strengths and weaknesses.
- Use an enthusiastic and positive tone, but remain credible.
- Write a complete first draft before attempting an edit.
- Be certain that you can achieve the project objectives you state in your proposal: if approved, your proposal will be the basis of a legal agreement.
- Identify a contact person: someone who is readily available and able to answer questions about the proposal.

### Key Elements of a Proposal

Although different funders have different requirements - and it is imperative that you do your homework to find out what they are - most proposals include the following components:

1. Summary
2. Introduction
3. Definition of the Issues
4. Program Plan
  - Goals/Objectives, Outputs, Outcomes, Impacts
  - Resources and Activities
5. Budget
6. Organizational Information
7. Evaluation Plan
8. Sustainability Plan
9. Conclusion
10. Appendices

## 1. Summary

The summary is probably the most important section of the proposal. It is an umbrella statement of your case and an overview of the entire proposal. It should be written last but presented first. The summary should:

- be no longer than two pages - be clear and concise
- state the overall vision for your project
- stress how and why your initiative will affect your target audience and community
- briefly mention your group's "track record", the issue(s) to be addressed, key outcomes, and the methods you will use
- list any resources that have already been committed, or other confirmed funding sources
- be positive and exciting - you want to convince the reader to keep reading and that this project should be considered for funding.

## 2. Introduction

Here you will provide a brief introduction to your organization and why it is the right one to carry out the proposed activities.

- Write this section second-to-last.
- Describe what your group or organization does (e.g., purpose, goals, programs, activities).
- Establish your group's credibility.
- Describe a past success or include testimonial from a stakeholder.
- Provide statistics that support your group's accomplishments.

## 3. Definition of the Issues

In this section, clearly describe the issue(s) or need(s) that your initiative will address or the problem(s) that you are planning to solve.

- Present the issue in terms of the clients' or community's needs (not your organization's needs).
- Be clear about the specific target audience or segment of the community affected by the issue.
- Briefly describe the legal and political environment, stakeholders, the literature and previous evaluations.
- Provide up-to-date statistics to support your statements about the issue and make sure that reference material is cited accurately.
- Specify how your initiative will address the issue(s): there must be a logical connection between your group's mission and the issues.
- Be realistic about what you can accomplish

## 4. Program Plan

### a) Intended Results

This section identifies the desired or intended results of your project or program by outlining what you expect to achieve in the short and long-term. It is based on “Developing a Logic Model or Theory of Change”, from the Community Tool Box. Desired results can be divided into three subcategories:

- i. Outputs
- ii. Outcomes
- iii. Impact

#### i. Outputs

- Outputs are the direct results of your program activities.
- They are normally described in terms of the size and scope of the products and services delivered or produced by the program (e.g., the number of workshops conducted, hours/days of service provided, new tools or resources developed and distributed, number of individuals reached).
- They should be concrete and easily measurable.
- For each program activity, identify what the outputs will be

#### ii. Outcomes

- Outcomes are specific changes in attitudes, behaviours, skills, knowledge, program utilization, etc. that you expect to result from your program activities. There may be unintended outcomes of your project as well; the actual outcomes of the project can only be identified at its conclusion.
- They are most commonly expressed at the *individual* level.
- Sometimes outcomes are divided into short-term outcomes, usually achievable within the time frame of the project, or within 1 to 3 years, and longer-term outcomes, requiring 4 or more years to attain.
- During program planning, desired outcomes are usually identified first, and then the inputs, activities and outputs required to attain those outcomes.
- You may have one or more desired outcomes; each outcome should be stated in one sentence.
- Desired outcomes should be S\*M\*A\*R\*T:
  - **S**pecific
  - **M**easurable
  - **A**chievable
  - **R**ealistic
  - **T**imed
- They are often directional:
  - “there will be an increase in...”
  - “there will be a decrease in...”
  - “there will be a reduction of...”

*iii. Impacts*

- impacts are the organizational, community and/or system level changes that you expect will result from your program activities.
- They are sometimes referred to as long-term outcomes
- Impacts may include improved quality of life measures, increased capacity or changes in policy e.g., improved health status, more diverse or self-reliant local economy, reduction in degree of social inequalities, or higher voter turnout.
- In many cases, significant impacts are not likely to take place until several years after the program has been operating.
- For some programs and projects, it may be more realistic to consider them as contributing to the desired impact, along with other programs and initiatives
- For projects with short-term goals and a narrow or limited scope, impacts may not be relevant to the proposal.

**b) Resources and Activities**

This section describes how you will go about implementing your program and the resources you will need to succeed. Resources and activities should logically tie in to the desired results. Resources and activities are sometimes referred to as “inputs”.

*i.) Resources*

- Include the human, financial, organizational and community resources that the program requires to carry out the work.
- Specify number of staff/volunteers and their relevant expertise and qualifications (profiles or résumé of key staff members may be included).
- Describe other resources at your disposal, e.g., Board members, individuals and groups in the community, research libraries, and equipment.
- Convince the funder that you have the right people and partners at the table.

*ii) Activities*

- Be specific: create a step by step work plan.
- Explain why each activity was selected, i.e., after consulting with stakeholders and experts in the field, research on best practices/successes in other communities.
- Describe specific assignments and be clear who is responsible for what:
  - financial management
  - program outcomes
  - reporting
- Be realistic: present a reasonable scope of activities that can be conducted within a reasonable timeline, and with the resources available.
- If it is a long-term initiative, break it into phases and indicate how long each phase will take.

The table on the following page will help you to develop your program workplan.

## Worksheet #5: Developing the Workplan

Objective	Activities	Resources	Outputs	Partners	Target Audience	Timeframe	Outcomes	Indicators
<i>What are the objectives to address the identified needs?</i>	<i>What activities will be carried out to meet the objectives?</i>	<i>What funds, personnel, facilities, etc. are required to carry out the activity?</i>	<i>What specific products and services will be delivered or produced?</i>	<i>Who are your partners?</i>	<i>Who will the activity reach? How many? Where? What are their characteristics?</i>	<i>What is the duration of activity and target date for completion?</i>	<i>What specific changes in attitudes, behaviour, skills and knowledge will result from the activities?</i>	<i>How will you know if the objectives are met?</i>
Objective #1	Activity #1							
	Activity #2							
Objective #2	Activity #1							
	Activity #2							
	Activity #3							
Objective #3	Activity #1							

### **A note about partnerships:**

Funders often favour proposals that include some degree of collaboration between or among groups or organizations with complementary or synergistic characteristics.

Describe the role of your partners: why they are involved, and what each partner brings to the table.

Be sure to work out details of arrangements with partners prior to completing the proposal: be specific about who will be responsible for what and the resources each group will contribute.

## 5. Budget

The budget section should demonstrate your organization's ability to manage money in an effective and responsible manner.

- Use the funder's budget template, if provided, with careful attention to the budget line definitions
- Present a realistic estimate of the funds required to achieve the program's objectives.
- Clearly outline the total cost of the initiative
- Specify other sources of funding; in some cases, committed funding can provide "leverage" to influence the granting of new/additional dollars.
- Present a budget proposal in a table, listing income sources and amounts first and then expense items and amounts.

*Income includes items such as:*

- earned income, e.g., sales of products or services
- contributed income, e.g., donations, grants, fundraising activities
- donations in kind, e.g., donations of labour, meeting space, use of equipment

*Expenses include items such as:*

- salaries and benefit
  - contract payment
  - rent and administration
  - program materials
  - travel and lodging
- Base figures on sound research.
  - Clearly state any assumptions you make and explain unusual items using footnotes/ endnotes.
  - Make sure that all calculations are accurate and that the budget balances.
  - Indicate your intention to follow accepted accounting procedures and keep an audit trail.

## Worksheet #6: Developing the Budget

**Name of Project:** \_\_\_\_\_

**Time Frame:** \_\_\_\_\_

	Cash	In-Kind	Total
<b>Revenue</b>			
Government Grant			
Foundation Grant			
Workshop Registration			
In-Kind Contributions			
<b>Total Revenue</b>			
<b>Expenses</b>			
Salaries (itemize positions, hours of work and pay rates)			
Benefits			
Office Supplies			
Equipment			
Postage			
Advertising			
Workshop materials			
Professional Development			
Photocopying			
Staff Travel			
Evaluation			
Administration & Overhead (pro-rated portion of expenses shared with other programs; e.g. bank charges, rent, phone, internet, insurance, IT services, audit)			
<b>Total Expenses</b>			
<b>Surplus (Deficit)</b>			

## 6. Evaluation Plan

Evaluation is an important process through which you determine whether the expected outcomes of the program are achieved and how effectively the program was implemented. In this section, you will describe how you plan to assess your program's results and/or the effectiveness of the program activities.

- If appropriate, consider using a participatory model of evaluation, such as is outlined in the Community Tool Box at <http://ctb.ku.edu/en/table-of-contents/evaluate/evaluation/participatory-evaluation/main>.
- For medium to long-term projects, consider including a plan for evaluating success at various stages of the project and for modifying your activities or plans if required.
- Include evaluation costs in your activity budget; estimate your costs, including staff time, materials and services required (including in-kind contributions).
- Try to involve potential program participants and key project stakeholders in developing evaluation criteria.
- Establish measurable indicators of success for short and long term outcomes.
- Whenever possible, evaluation plans should include both quantitative and qualitative methods:
  - quantitative methods focus on things that can be counted or directly measured, e.g., number of participants involved, number of sessions conducted.
  - qualitative methods are generally used to provide more in-depth information about individual experiences, perspectives and context, e.g., subjective benefits or changes in attitudes or perceptions reported by program participants.
- Describe how the data will be collected, analyzed, and stored:
  - methods of collecting quantitative data include structured choice survey questions, tracking forms and service utilization
  - methods of collecting qualitative data include open-ended survey questions, focus groups, in-depth interviews, diaries/journals, or forums.
- Describe how you will use and communicate the evaluation results (be sure to obtain consent from participants before using any information that they provided).

You may also find it useful to develop an evaluation plan framework in a chart format, as shown on the next page.

# Worksheet #7: Developing the Evaluation Plan

Short Term Outcomes	Indicators	Collection Methods	Data Source	Collected by
<p>Example:</p> <p>Increased knowledge about ....</p>	<p>Example:</p> <ul style="list-style-type: none"> <li>• % participants who increased their in knowledge about ...</li> </ul>	<p>Example:</p> <p><b>Qualitative:</b></p> <ul style="list-style-type: none"> <li>• Participants Journals</li> <li>• Participant interviews</li> <li>• Observation</li> </ul> <p><b>Quantitative:</b></p> <ul style="list-style-type: none"> <li>• # individuals trained</li> <li>• Pre-and post knowledge assessments at workshops</li> <li>• evaluation form with rating scales</li> </ul>	<p>Example:</p> <ul style="list-style-type: none"> <li>• Participants</li> <li>• Workshop facilitator</li> </ul>	<p>Example:</p> <ul style="list-style-type: none"> <li>• Workshop facilitator</li> <li>• Project Manager</li> </ul>
a)				
b)				
c)				
d)				

## 7. Sustainability

This section is necessary if there is an expectation that activities will continue past the program or project completion date. By developing a strategy for future sustainability, the potential funder will not feel that the benefits gained by the program will be lost after the grant period expires.

Show how the initiative will be supported in the future:

- if applicable, describe your plans to continue the activities beyond the granting period (e.g., continue as a volunteer-run initiative, collaborate with other organizations)
- present a detailed plan to obtain future funding or support from alternative sources.

## 8. Conclusion

Here you will make your final comments in support of the proposal. In one or two paragraphs, briefly restate what you want to do and why it is important.

- Emphasize 'leverage'; e.g.
  - ✓ strategic alliances or partnerships
  - ✓ sustainability
  - ✓ contributions of existing assets and resources
  - ✓ value for the money, including potential cost savings or avoidance
  - ✓ coordinated timing
- Express confidence in your proposal.

## 9. Appendices

Generally speaking, all of the really important information should be included in the body of the proposal. The appendices include supplemental information such as the following:

- Board of Directors list
- the names and contact information of references
- testimonials, endorsements or letters of support
- legal documents; e.g. proof of incorporation
- audited financial statements
- annual report
- publications including brochures or newsletters
- relevant articles or summaries of reports
- media clippings or publicity items.

If you are including references, ensure that the referees have consented and are familiar with your organization *and* with the proposal. Send them a copy of your proposal in advance and be sure to follow-up with a call to discuss it.

## V. “Packaging” Your Proposal



Some final tips to consider as you apply the finishing touches:

- use an easy to read font such as Times Roman, or Arial; avoid using different fonts within the same page or section
- allow some white space without leaving any large gaps:
  - 1.5 space (instead of single or double space)
  - 1¼ ” to 1 ½” margins
- number your pages
- bullets or numbering may be appropriate when listing more than three points in a paragraph
- spell and grammar check your document, but also proof-read it carefully; consider asking someone else to proofread it for you
- ensure that external references are documented properly, using a recognized footnote or endnote format

If you are submitting the proposal in print format:

- use a neutral tone of paper
- avoid expensive or flashy packaging
- place proposal and accompanying documents in a folder or binder
- include a cover letter, itemizing the documents that are being submitted.

If you are submitting the proposal by email:

- ensure all attachments have appropriate file names
- request a delivery receipt

## VI. Proposal Appraisal

Before you submit your proposal, it is recommended that you ask a friend or colleague to take a final look. At this point, we are often so intimately connected to the proposal that we “can’t see the forest for the trees”. The template on pages 18-19 will provide some guidelines and focus for their critique.



These charts can also be used in an interview with the funder to evaluate the proposal and to assess the strengths and identify the areas that might need a little work.

Be sure to leave enough time for a thorough review and still get your proposal in *on time*.

## Worksheet #8: Proposal Appraisal

Component	Yes	No	Rating (1-5)	Comments/Suggestions
<b>1. Overall Impression</b> 1.1 Title 1.2 Logical Flow 1.3 Layout/Visual Attractiveness 1.4 Grammar/Spelling				
<b>2. Summary</b> 2.1 Provides succinct summary of the needs to be addressed, the purpose and expected outcomes 2.2 Identifies the responsible organization and its credibility 2.3 Includes total cost, funds already obtained and amount requested 2.4 Makes a clear and compelling case				
<b>3. Definition of Issues or Needs</b> 3.1 Relevance 3.2 Evidence 3.3 Logical connection between the needs to be addressed and the proposed initiative				
<b>4. Credibility</b> 4.1 History 4.2 Track record 4.3 Partners/Advisors				
<b>5. Desired Results</b> 5.1 Specifies outputs, outcomes and impacts 5.2 Describes the specific population that will benefit				
<b>6. Resources and Activities</b> 6.1 Relates to Desired Results 6.2 Describes sequence of activities/timelines 6.3 Describes project staffing e.g., names, titles, qualifications, tasks 6.4 Presents a reasonable scope of activities that can be conducted within the time and resources of the program/project				

Component	Yes	No	Rating (1-5)	Comments/Suggestions
<b>7. Evaluation Plan</b> 7.1 Presents a plan for tracking outputs 7.2 Presents a plan for evaluating outcomes 7.3 Identifies who will be doing the evaluation and, if an external consultant, how they were selected 7.4 Clearly states indicators of success 7.5 Identifies any tools or questionnaires to be used 7.6 Describes the process of data analysis 7.7 Describes how evaluation results will be shared				
<b>8. Budget</b> 8.1 Income 8.2 Expenses 8.3 Evidence that cost estimates are based on sound research				
<b>9. Leverage</b> 9.1 Alliances/Partnerships 9.2 Sustainability 9.3 Demonstrates clear "value for the money"				
<b>10. Conclusion</b> 10.1 Concise 10.2 Demonstrates a level of confidence				
<b>11. Things to Omit</b>				
<b>12. Things to De-emphasize</b>				
<b>13. Things to Emphasize More</b>				
<b>14. Other Comments</b>				

*adapted from the Grantsmanship Centre Training Programs and The Community Social Planning Council of Toronto.*

## VII. Post-Submission Thoughts



- a) Be aware of the funder's granting cycles: you may have quite a wait before you hear from them.
- b) On occasion, the funder will ask for more information: this is a sign that they are interested and want to help you to produce a stronger proposal.
- c) Understand that granting is a competitive, rigorous process; don't be disheartened if your proposal is declined.
- d) If your proposal is declined, contact the funder for suggestions about how to make your next application stronger.
- e) Remember that grant-making is a craft; it involves both art and science, and takes some practice to get it right!

## VIII. References

The information contained in this manual was compiled from a variety of sources, including the following:

*Community Social Planning Council of Toronto, Karen Liberman*  
"Writing Effective Funding Proposals: Practice Makes Perfect"

*University of Kansas*  
Community Tool Box  
<http://ctb.dept.ku.edu/en>

*W.K. Kellogg Foundation: Logic Model Development Guide*  
[www.wkkf.org/resource-directory/resource/2006/02/wk-kellogg-foundation-logic-model-development-guide](http://www.wkkf.org/resource-directory/resource/2006/02/wk-kellogg-foundation-logic-model-development-guide)

*Kiritz, Norton J.:* Proposal Checklist and Evaluation Form, The Grantsmanship Center

*The Ontario Trillium Foundation*  
Presentation Notes: Joanne Richmond, Jacqueline Powell, Inga Lubbock

*The Foundation Centre*  
A Proposal Writing Short Course - [www.fdncenter.org/learn/shortcourse/prop1.html](http://www.fdncenter.org/learn/shortcourse/prop1.html)

*van Rotterdam, Ingrid*  
Building Foundation Partnerships - Chapter 5: p. 49 - 64 Canadian Centre for Philanthropy

Your comments on this manual are most welcome! Please contact our central office: phone: (416) 408-4841; toll free: 1-800-766-3418 or email: [info@ohcc-ccso.ca](mailto:info@ohcc-ccso.ca)

To learn more about OHCC, please visit our website: [www.ohcc-ccso.ca](http://www.ohcc-ccso.ca)

## IX. Additional Resources



Here are some web sites for more information & ideas:

Charity Village <https://charityvillage.com>

- The Knowledge Centre provides free resources at <https://charityvillage.com/cms/knowledge-centre/fundraising>
- extensive guides and resources for fundraising, available for a fee at <https://charityvillage.com/cms/active-learning>
- Charity Village Funder Directory <https://charityvillage.com/cms/knowledge-centre/fundraising/funder-directory> provides links to online databases and directories of funding agencies and foundations of interest to Canadian individuals and organizations, plus online tools and resources of value to those involved in prospect research and other areas of fundraising.

The Community Tool Box <https://ctb.ku.edu>

- a free, online resource for those working to build healthier communities and bring about social change. It offers thousands of pages of tips and tools on topics such as community assessment, planning, logic models and evaluation.

Non-Profit Guides [npguides.org](http://npguides.org)

- free web-based grant writing resources for non-profit organizations, including sample proposals

The Grantsmanship Center <https://www.tgci.com/resources>

- U.S. based organization that provides resources related to proposal writing and grant seeking.

W.K. Kellogg Foundation Logic Model Development Guide and Evaluation Handbook  
<http://www.wkcf.org/resource-directory/resource/2006/02/wk-kellogg-foundation-logic-model-development-guide>

Innovation Network [www.innonet.org/](http://www.innonet.org/)

- provides tools and instruction for creating detailed program and evaluation plans (free registration required)

BIG Online [www.bigdatabase.ca](http://www.bigdatabase.ca)

- database of business, industry and government grants; paid subscription required

Imagine Canada [www.imaginecanada.ca](http://www.imaginecanada.ca)

- offers programs and provide resources that help strengthen charities and their operations, so they can, in turn, support the communities they serve

- Grant Connect <http://store.imaginecanada.ca/collections/grant-connect/Grant-Connect> is a directory of grants; paid subscription required.

Grants Ontario [http://www.grants.gov.on.ca/GrantsPortal/en/OntarioGrants/GrantsHome/Grants Ontario](http://www.grants.gov.on.ca/GrantsPortal/en/OntarioGrants/GrantsHome/GrantsOntario)

- source for grants provided by several Government of Ontario ministries.

## Appendix A: Sample Program Logic Model

### *Healthy Communities-An Approach to Chronic Disease Prevention: Project Logic Model (simplified)*

<b>Long-term outcome</b>	Healthy public policies and localized actions that impact determinants of health relating to cancer control within the socio-cultural, physical, economic and political environments of communities.
<b>Intermediate outcomes</b>	<ol style="list-style-type: none"> <li>1. Successful completion of a community-based participatory research project involving specific cancer prevention interventions in at least nine communities.</li> <li>2. Increased capacity of communities to work together for cancer prevention</li> <li>3. Adaptation of scientific knowledge and intervention tools to be relevant to local contexts.</li> <li>4. Knowledge is transferred and exchanged among participating communities.</li> </ol>
<b>Short-term Outcomes</b>	<ol style="list-style-type: none"> <li>1. Project Team and an Advisory Committee established to provide guidance to the conduct of the project</li> <li>2. Operational policies and procedures established around reporting requirements and financial transactions.</li> <li>3. Comprehensive evaluation design developed</li> <li>4. Detailed comprehensive work plan for each partner developed</li> </ol>

<b>Strategies</b>	Community engagement in community-based participatory research project	Multi-sectoral partnership development at all levels of the project	Engagement of politicians and government staff to obtain political support	Use of asset based community development methods	Development of tools and resources for knowledge transfer and exchange	Comprehensive project evaluation
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<b>Activities and Outputs</b>	<p>Engage 16 communities across Canada</p> <p>Develop, implement and evaluate Participatory Action Research framework protocols and tools</p> <p>Work with communities to develop case studies of their initiatives</p>	<p>Collaborate with other organizations to disseminate and exchange knowledge</p> <p>Establish a multi- sectoral Coordinating Committee for each participating community</p>	<p>Explore the role of municipalities in helping to prevent cancer</p> <p>Provide access to expertise, tools and resources adapted for municipalities</p> <p>Produce a paper on healthy public policy</p>	<p>Create a summary of each participating community</p> <p>Provide opportunities for knowledge exchange, e.g. webinars, dialogues, forums</p>	<p>Develop National Outreach and Communications Strategy</p> <p>Publish articles and stories on the CHC website, newsletters and journals</p> <p>Deliver presentations</p>	<p>Develop a detailed evaluation plan</p> <p>Implement systematic data collection procedures</p> <p>Compile, analyze and report results quarterly</p>
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## Appendix B: Sample Workplan

Adapted excerpts from OHCC's Healthy Food For All project workplan ([www.ohcc-ccso.ca/en/healthy-food-for-all](http://www.ohcc-ccso.ca/en/healthy-food-for-all))

Goal: to support the development of healthy, sustainable, local food systems in Ontario

Objective	Activities	Outputs	Partners_	Target Audience	Timeframe	Outcomes	Program Indicators
<b>Objective #1:</b> To establish effective <i>governance and organizational structures and processes</i> for the project	<b>Activity #1</b> Formalize the membership and terms of reference for the project steering committee (SC)	a) Terms of Reference  b) meeting minutes	4 community organizations are partners in this project and will be represented on the project steering committee (SC).	N/A	Oct 1-15, 2013	Strong foundations for a healthy and productive relationship in terms of clear roles and responsibilities	Satisfaction of project partners with the management and decision-making structures of the project
	<b>Activity #2</b> Select and orient the Project Coordinator (PC)	PC hired	SC	N/A	Oct 1 - 30, 2013	Effective project coordination	Satisfaction of project partners with project coordination
	<b>Activity #3</b> Develop detailed action plans based on the approved work plan	Clear action plans created for each participating organization	SC, participating community organizations (CO) and volunteers	N/A	Oct 1 - Nov 15, 2013; with periodic reviews	Detailed action plans approved by SC and documented in meeting minutes	The execution of each project component is assessed by the SC as timely and effective.
<b>Objective #2:</b> To develop a robust <i>communications infrastructure</i> and mechanisms designed to mobilize knowledge, promote knowledge transfer and facilitate interactive peer-learning among food-related community organizations.	<b>Activity #1</b> Develop a communication plan for the project	Written communication plan shared with project partners	SC, PC, communications consultant, website developer	All Ontarians working towards community food security and sustainable local food systems	Oct 15 - Nov 15, 2013	Partners execute communications activities in an organized, effective manner	Partners are satisfied with the communications plan and their role in developing it.
	<b>Activity #2</b> Utilize social media to inform public about project activities	A minimum of weekly posts on Facebook, Twitter, Linked in and other appropriate sites	SC, COs, PC, facilitators, volunteers		Oct 15, 2013 - Mar 31, 2015	The reach and interactivity of the project is maximized	# items posted # followers/likes # of new resources # of individuals accessing online resources
	<b>Activity #3</b> Create web platform for knowledge mobilization, translation, transfer and exchange	Creation of a dynamic project site.	SC, COs, PC, facilitators, volunteers communications consultant, website developer		Initial development: Nov 1 - Dec 31, 2013	A centralized, user-friendly site that provides high quality educational resources	Positive responses to the attractiveness, comprehensiveness and accessibility of the website.

Sample workplan (continued)

Objective	Activities	Outputs	Partners_	Target Audience	Timeframe	Outcomes	Program Indicators
<b>Objective #3</b> To work with four existing community organizations to undertake a <i>comprehensive local food systems planning process</i>	<b>Activity #1</b> Work with COs to develop an action plan for community engagement and planning activities	Consultation report	SC, COs	Community organizations pursuing community food security and sustainable local food systems	Dec 1, 2013 - Mar 31, 2014	Engagement of people from different sectors and segments of the food system in planning the activities within their local area.	Evaluation of products based on criteria developed from data collected during the consultations
	<b>Activity #3</b> Organize a series of community food systems planning meeting in each of 4 regions	16 planning meetings held  Comprehensive community food system plan developed	SC, COs	Region-specific individuals and organizations from diverse sectors and demographic backgrounds	January 15, 2014 - Feb 28, 2015	Increased knowledge, awareness and problem solving on region-specific issues among participants.	# of participants and sectors engaged  # actions undertaken to implement the plan
<b>Objective #4</b> To <i>build community capacity</i> for food systems planning by increasing the knowledge and skills of COs	<b>Activity #1</b> Provide training in communications and social media technology to enable COs to connect with each other using affordable and sustainable methods	3 webinars on how to use the project online resources and participate effectively in the project.	SC, COs	CO's and other community organizations working towards community food security and sustainable local food systems	Nov 14, 2013 - introduction; Feb 13, 2014 - intermediate May 15, 2014 - Advanced	Project participants and others interested in food issues share information, knowledge and ideas through user-friendly interactive communications resources.	# training sessions provided  evaluation of sessions by participants  reports of increased use of technology
<b>Objective #5</b> To evaluate the project using qualitative and quantitative measures to assess the extent to which the objectives were met; the satisfaction of project participants and partners and the impact of the project activities.	<b>Activity #1</b> Hire an evaluation consultant to develop and implement a project evaluation plan	Evaluation Plan	SC	SC, funders	Oct 15 - Nov 30, 2013	Evaluation Plan approved by SC	Evaluation Plan approved by SC
	Collect, analyze and report on evaluation data as outlined in the Evaluation Plan	Evaluation report	Evaluation Consultant, SC, COs	SC, funders	Jan 1- 2014 - Feb 28, 2015	Positive evaluation results will increase the credibility of the project results and recommendations	Evaluation report submitted  Positive evaluation results

## Appendix C: Sample Budget

**Name of Project:** Building Voluntary Sector Capacity

**Time Frame:** Oct 1, 2014 - March 31, 2015

	<b>Cash</b>	<b>In-Kind</b>	<b>Total</b>
<b>Revenue</b>			
Ontario Government	25,648		25,540
Workshop Registration (40 @ \$40)	1,600		1,600
In-Kind Contributions (steering committee participation, students, partners' contribution of supplies, administration)		11,200	11,200
<b>Total Revenue</b>	<b>27,248</b>	<b>11,200</b>	<b>38,340</b>
<b>Expenses</b>			
Project Director (4 hrs/mo @ \$48)	1,200		1,200
Project Manager (14 hrs/wk @\$42/hr x 26 weeks)	15,200		15,200
Consultant (design and deliver workshop: 3 days@\$800/day +HST)	2,700		2,700
Program Assistant (student for research, communications)		5,000	5,000
Workshop expenses (venue: \$300; speakers' fees and travel: \$2,000; nametags/signage: \$100; communications: \$200; catering \$1,050 )	3,650		3,650
Steering Committee participation (5 x 4 hrs/mo @ \$45)		5,400	5,400
Telecommunications (5 steering committee teleconferences, 6 lines, 90 minutes@ \$.04/line)	108		108
Supplies (paper, ink, copying of workshops handouts, reports)	250	100	350
Project Manager Travel	600		600
Administration & Overhead	3540	700	4,240
<b>Total Expenses</b>	<b>27,248</b>	<b>11,200</b>	<b>38,448</b>
<b>Surplus (Deficit)</b>	<b>0</b>	<b>0</b>	<b>0</b>

## Appendix D. Sample Evaluation Plan

**Name of Project:** Neighbourhood Compost Project

**Objective:** To increase the number of households within the neighbourhood that compost household organic waste

Activities	Expected Outcomes	Indicators of Success
Develop and hold a series of five free composting workshops for residents in a high-density neighbourhood.	Increased understanding of the benefits and methods of composting	<ul style="list-style-type: none"><li>• 200 households participate in the training</li><li>• 50% of participating households complete the composting workshop series</li><li>• Composting bins are being used properly 3 months after the training</li></ul>
Establish an award system to promote composting.	Increased participation in composting	<ul style="list-style-type: none"><li>• 30% of participating households are composting regularly one year after program start</li></ul>
Hire local youth to build and maintain 5 convenient composting stations within the neighbourhood.	Decrease in proportion of waste going to landfill	<ul style="list-style-type: none"><li>• The composting bins are at 90% capacity after one year</li></ul>

