



BF102

PROPOSAL WRITING

LEARNING EVENT WORKBOOK

February 2018

Acknowledgements



These resources and materials have been developed on behalf of Recreation North for use during delivery of the Community Recreation Leadership Program. Any other use requires prior permission from Recreation North through the appropriate territorial partner.

Content, development and design is attributed to the expertise of:

Brenda Herchmer (Campus for Communities of the Future) with some input from Kimberly Masson, Recreation North Trainer for the Pilot.

The proposal writing workbook is for use in BF102 by Recreation North. Changes and modification cannot be made without consultation with Brenda Herchmer.

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Funding to develop the Community Recreation Leadership Program
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Learning Event Description

Funding and grants provide essential revenue for community recreation. Leaders who prepare effective proposals are better able to create new initiatives, support existing ones, and build relationships with funders. A good proposal combines marketing with an outcome-based, community-driven plan. Learn how to prepare and write compelling proposals that generate an investment in recreation.

Learning Objectives

Upon completion of this learning event, participants will be able to:

- Apply the common elements of successful grant applications and funding proposals.
- Compile a proposal that reflects an outcome-based approach.
- Complete accountability documents.
- Develop strategies to involve funding partners.

About Your Trainer

Kim Masson

- Executive Director of the Embrace Life Council, a NGO dedicated to suicide prevention that encourages Nunavummiut to value and embrace life
- originally from Manitoba, has called Nunavut home since 2006
- a former business manager turned educator
- began teaching in Iqaluit and coaching territorial athletes in 2006
- moved to non-profit work and then completed a Master's Degree in Administration of Indigenous Schools in 2016
- Kim and her husband Dennis, three daughters, and grandchild are proud to call Iqaluit home



Activity #1 What is a Proposal?

Circle the correct answer:

A proposal:

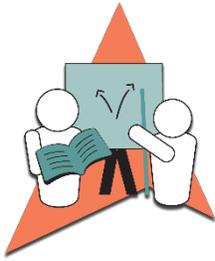
<ul style="list-style-type: none">• is not a planning tool	True	False
<ul style="list-style-type: none">• can help secure financial support for community recreation	True	False
<ul style="list-style-type: none">• allows the funder to shape the project	True	False
<ul style="list-style-type: none">• is not a great way to build your recreation funding network	True	False
<ul style="list-style-type: none">• is the same as a grant application	True	False



Activity #2: Who are Your Funders?

What agencies, foundations, or other external (non-hamlet) funders have contributed to recreation programs in your community?

The Connection Between Proposal Writing and Planning:



Proposal writing is simply good planning. Good planning is determining:

1. Where you are now
2. Where you want to go
3. The steps for how you are going to get there

Activity #3: What Funders Want To Know

Choosing from the following words, fill in the blank with the best answer:

Cost
When
How
Plan
Why
What

All proposals offer a plan to fill a need and will be evaluated by the funder according to how well it answers questions about:

1. _____ an issue or challenge is important
2. _____ you are proposing
3. _____ you plan to do it
4. _____ you _____ to do it
5. How much is it going to _____

Activity #4: If you were a Funder...

If you were a funder what would you want to see in a recreation proposal?

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.
- 8.
- 9.



Activity #5: Proposal “Do’s” and Don’ts

Add a check mark (✓) for each of the following. Is it a “Do” or a “Don’t?”	DO ✓	DONT ✓
• share references and/or testimonials even if they weren’t specifically requested		
• repeat yourself within the proposal		
• use plain language and headings		
• make the proposal longer than specified		
• include estimates of more time, money, material and staff than you think you may need		
• always highlight the outcomes or benefits that will result		
• highlight previous mistakes		
• give up if you are turned down		
• you don’t need to follow the funder’s format or template as long as you provide all requested information		
• establish your credentials for delivering what is being proposed		
• contact the funder if you’re not sure if your proposal is a fit or if you are turned down		
• be flashy		
• annoy the funder		

Activity #6 The Recreation Advantage

Those in other jobs e.g. social services, health sometimes describe their profession as being similar to trying to catch the “drips” from a “leaky faucet”.

What makes recreation different?

What advantage does recreation have?

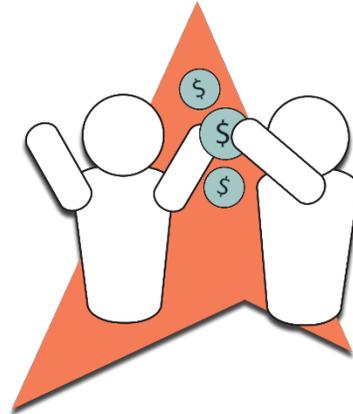
**What makes
recreation different?**



**What key advantage
does recreation
have?**

What Do Proposals Generally Include?

1. Title Page
2. Summary of The Request
3. Organizational Overview
4. Needs And Outcomes
5. Sustainability And Future Funding
6. Plan For Implementation
7. Appendices (e.g. Letters of Support)



1. Title Page

- use a clear, direct title that describes both why the program is important and what it is. For example, use, “Curling for Active Healthy Youth” instead of “A Way To Promote Health And Wellbeing On Ice”
- indicate the organization or individual to whom you are directing your proposal
- include the date submitted

2. Summary Of The Request

- appears at the beginning (but written after you’ve finished writing everything else)
- a concise summary of the proposal
- sometimes known as an executive summary
- identifies the grant applicant
- includes evidence of credibility
- clearly describes the problem/issue being addressed (statement of need)
- summarizes the outcome(s) that will be delivered
- describes *how* the outcome(s) will be delivered

3. Organizational Overview

- include your vision or mission statement, the values or principles that guide your work, and those you serve
- connect the above to the purpose of your current proposal

- show how the target group for the proposal have been involved and evidence of their support
- introduce team members, partners or collaborators and their roles
- include 1-2 key stories or testimonials (include others in the appendices)

4. Needs And Outcomes

- includes evidence of the problem or challenge
- describe your target group e.g. Youth? Men? Women? Elders?
- how it relates to your organization and to the funder
- evidence or research to support the need
- does not make any unsupported assumptions
- makes a compelling case by highlighting the outcomes that will be delivered (the differences your project will make)

What are Outcomes?

- desired end results
- also referred to as the *benefits* of recreation, the *end results* or *impacts*
- why your program/organization/department exists
- the benefits or changes your initiatives are making for individuals (including yourself) or your community
- the differences that need to be promoted so people aren't saying: So What?

Outcomes Delivered by Programs, Services, Events

- what benefits or changes are there for stakeholders during or after their involvement with your program, service, or event?
- what didn't they have at the end that they didn't have when they started?
- typically there are benefits or changes in:
 1. *knowledge*
 2. *attitudes*
 3. *values*
 4. *skills*
 5. *behaviour*
 6. *condition*
 7. *status*
- a change for the better (or in some cases - get worse more slowly than they would have otherwise)

Outcomes Explain Why Your Proposal is Important

Will Your Proposal Result In:

1. knowledge and learning being increased?
2. attitudes being changed?
3. undesirable behaviour being reduced?
4. desirable behaviour being increased?
5. new behaviours being maintained?
6. social status being impacted?
7. economic conditions being improved?
8. health conditions being increased?
9. reduction in administrative costs?
10. economic development being increased?
11. participant, employee, and/or stakeholder satisfaction being improved?

5. Sustainability And Future Funding

- most funders prefer one time projects or resources rather than ongoing or operational expenses
- funders don't want you to be totally dependent on their dollars
- they will be looking to see that you have included other sources of revenue and/or in-kind resources
- in-kind resources can include donated equipment, facilities, promotion or food, volunteers who contribute their time, etc.

6. Plan For Implementation

As outlined in *PE101 Deliver Recreation Programs and Events* a plan for a proposal needs to include:

- a. the project or program **vision:** *what will success look like?*
- b. **purpose:** *one sentence to describe why this is being done, how is it being done, and who is it being done for?*
- c. **outcomes:** *the benefits or impact your initiative will have*
- d. **strategies:** *general goals or priorities*
- e. **implementation:** *(deliverables or outputs: tangible things such as training, development of resources, number of programs offered etc. timelines, action steps, budget – including in-kind resources such as volunteer time, donated use of facilities)*
- f. **evaluation methods:** *how will you know the program or project has been a success?*

7. Appendices

This section includes elements of your proposal that are of secondary interest to the funder. Consider including:

- quotes, endorsements, testimonials
- previous media coverage
- resumes
- letters of support
- evaluation tools

Two Strategies for Developing Proposals

1. Staff Driven Proposals

Used when:

- outcomes and solutions are clear
- needs and direction has been established already with research, ideas or recommendations from experts (staff or consultants)
- *“we have the facts from the experts and will apply for funding to develop the programs, events or initiatives that we as staff see as being best for people in our community”*
- the priorities determined by the community are aligned with what the funder is interested in funding



2. Community-Driven Proposals

Used when:

- recreation challenges, unmet needs, or issues are clear, but the causes and solutions are not
- there is interest in involving people in the community to help them work together to provide recreation opportunities
- residents are accepted as the experts on needs and solutions, and as a potential source of strength and knowledge
- *“as a staff person I don’t have the answers but I can call a meeting and encourage people to be involved in deciding our priorities, determining how we can work together and where we can apply for funding”*





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Proposal Checklist

- Cover Letter to Funder
- Title Page
- Summary of The Request
- Organizational Overview
- Needs And Outcomes Being Addressed by the Proposal
- Sustainability and Future Funding
- Plan For Implementation
 - Vision and Values
 - Purpose
 - Outcomes
 - Strategies/Goals
 - Deliverables or Outputs
 - Timelines
 - Action Steps
 - Budget
 - Evaluation Methods
- Appendices e.g. quotes, endorsements, testimonials, previous media coverage, resumes, letter of support, evaluation tools

