



The Surrey Forum: Building the Community Economy

Workshop: Community Initiatives – Funders’ Perspective

Presentation: Making the “business case” for your project or program

Date: August 27, 2009

Time: 10:30 – 12 noon

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Session Objectives

- Review common elements of a funding application or proposal
- Gain a better understanding of the core criteria that funders look for when assessing funding proposals
- Gain knowledge on how to build a strong case for a funding proposal



Setting the Context: Building the Community Economy

- Developmental approach
- Asset-based / Asset building
- Sustainability and self-reliance
- Collaborative, cooperative
- Prevention and reduction of poverty



Typical components of a Funding Proposal

- Organizational profile – mandate, history, number of staff, number of volunteers, contact information
- Project description and rationale
- Project goals and objectives
- Statement of need, problem, opportunity
- Description of the response/solution proposed



Typical components of a Funding Proposal (con't)

- Funding – budget or projected cash flow: include cash and in-kind
- Engagement approach – community, volunteers, staff
- Activity plan and timeline
- Outcomes/deliverables
- Measurement and evaluation – a plan with clear performance indicators that can be measured
- Appendices – Annual Report, Board of Directors list, Financial statements



Making the Case: Three Core Elements

1. Need, problem, gap and/or opportunity
2. Return on Investment – *results, results, results*
3. Demonstrated Viability



Need, Problem, Gap, Opportunity

Demonstrated Need and/or Opportunity

- Clearly state the need/problem; why it is significant or important, impacts of problem
- Cold hard evidence – relevant, objective, statistical & anecdotal, community and expert support
- Demonstrate how this need/issue is relevant to the Funder's mandate
- Show you have done taken some steps – eg. market survey, needs assessment, feasibility study



Need, Problem, Gap, Opportunity (con't)

Demand and Supply

- Need vs Demand
- Evidence of “unmet” need for program or service
- Demonstrate awareness and knowledge of similar programs/services -- “competition”
- Define the “gap” or niche this project will fill – what is lacking, what can be improved, what innovation is needed



Return on Investment *results, results, results*

- What is the payoff of the funder's (and your) investment (in respect to need identified)
- What you expect and/or hope to achieve / What does success look like?
- Basis for monitoring and evaluating project results
- Articulate additional benefits for the funder – specific to their goals/mandate



Return on Investment (con't)

results, results, results

How to articulate results

- Confused? -- goals, objectives, purpose, activities, outputs, outcomes, impact???
- Results = end state Results \neq activities
- Logical results chain:
activities/strategies \rightarrow outcomes (short-term, long-term, ultimate)
- Results indicators – what will you track

...one example

This basic table demonstrates how you can articulate the expected results of a project and how you will track results (Source: Trillium Foundation)

Facilitates the review and assessment of proposals and can form basis for reporting on results

Expected Results What do you want to accomplish?	Activities/ Strategies How will you accomplish it?	Performance Indicators How will you know you've accomplished what you wanted to?

Another way to think of it is:



...one example

<p>Expected Results What do you want to accomplish? Describe the changes you hope will occur: your goal or desired outcome.</p> <p>Use Results or Change Words: Improve Reduce Enhance Expand Decrease Prevent Maintain</p>	<p>Activities How will you accomplish it? List the tasks or things you will do to achieve your goal.</p> <p>Use Activity or Action Words Conduct Deliver Facilitate Promote Train Provide Repair</p>	<p>Performance Indicators How will you know you've accomplished what you wanted to? Identify things that will show you are achieving the results you are planning.</p> <p>Use Indicator/Description Words: Quantitative: Numbers Percentages Qualitative: Perceptions Feelings Attitudes</p>
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Viability

Why You? Organizational Capacity

History or Track Record

Governance

- Clear mission or mandate and vision
- Board capacity
- Leadership

Operations

- procedures, policies, systems – e.g. financial; hiring; reporting



Viability (con't)

Financial Resources

- diverse and sustainable resource base

Human Resources

- management, staff, volunteer capacity: skills, knowledge, experience; clear understanding of roles

Networks, partners, allies – “social capital”

External relations – government, funders, media



Viability (con't)

Project Viability

Does the project align with the organization's mission and expertise?

“Money Talks”: Start-up/ Launch

- start-up funding/financing
- shared risk



Viability (con't)

Project Viability

“Making It Happen”: Implementation

- infrastructure
- human resources
- service delivery model

“For the Long Haul”: Sustainability

- diversified funding
- Board and Management leadership



More Tips

- Balance idealism with realism: be realistic, self reflective
- Organizational ability – evidence-based, defensible
- Environmental scan – community services ‘pulse’, what is going on? Who is doing what? (supply and demand)
- Excessive information – succinct, simple, focused
- Balance your budget
- Honest and open communication