



**Congratulations!** You have an idea for a project that will help improve well-being in the Basin. However, you may have realized you or your organization can't do it alone.

Before approaching potential funders, you should be as clear as possible about your idea and your needs. Follow the steps below, which will guide you through the planning process. (You can also visit [ourtrust.org/idea](http://ourtrust.org/idea) to view these steps online.)

## 1. Who will be involved?

### Consider your organization

Ask yourself questions like these:

- Is this project a fit for my organization?
- Does my organization have the time, resources and expertise to carry out this project? Are we being realistic about implementing a project like this?
- Before we take on this project, should we access the resources of the Trust's Non-profit Advisors Program ([ourtrust.org/our-work/community/non-profit-advisors-program](http://ourtrust.org/our-work/community/non-profit-advisors-program)), which can help us increase capacity, become more sustainable and become more efficient?
- Will our staff and volunteers safely be able to take on this project?
- Would a different organization do a better job of addressing this need?
- Will the project complement the services we already provide?
- What other supports do we need to be able to take on this project?
- Are we passionate about and committed to this project?
- Which specific person will be able to oversee this project?

Write a brief description of your organization. Include information like:

- your programs and services
- the area you serve
- who you serve
- your mandate
- your registration/society/charitable status numbers
- your incorporation date and structure
- your number of Board members, staff and/or volunteers
- your accomplishments to date: what one or two things stand out in your track record?
- your credibility and reputation.

If you need help finalizing your plans, connect with us at 1.800.505.8998 or [info@cbt.org](mailto:info@cbt.org).

Include a couple of sentences about why your organization is best suited to take on this particular project. Also give reasons why a potential funder can trust you to use requested funds responsibly and effectively.

## **Consider other supporters**

Showing that other groups support your project is a great way to demonstrate that your project addresses a recognized need. Also, some funders require that you seek support from multiple sources.

Ask yourself questions like these:

- Do we need partners to help us complete this project?
- Which other groups agree that this project is necessary?
- Can these groups provide:
  - staff or volunteers to help deliver the project
  - space or equipment
  - money
  - professional expertise, advice or guidance
  - letters of support?
- How can they continue to provide support into the future?

## **2. What is your project about?**

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Consider your project's bigger picture. Jot down notes on:

- what you propose to do
- where it takes place
- when it will start and how long it will take
- who it will benefit
- why this project is important.

You'll develop these ideas further in the following steps.

## **3. Why is this project important?**

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In order to obtain support, you have to be able to convince people your project is important.

Ask yourself questions like these:

- What need does this project address?
- How severe or urgent is this need?
- How long has this need existed?
- Who will be impacted by this project? How many will be affected?
- Do others think that addressing this need is a priority? How do I know?
- Has this need been identified in any community plans?
- Has there ever been a gap analysis or needs assessment done? Should my organization do one before proceeding?

## 4. What are the project's goals and objectives?

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### What is your project's main goal?

A goal is a broad statement that describes what you wish to accomplish through your project. Generally, it states how the problem will be improved and who will be affected.

Use active verbs like decrease, deliver, develop, establish, improve, increase, produce, provide.

For example, your goal might be:

- to improve literacy among young children in the West Kootenay region.
- to control the growth of the invasive plant Scotch thistle on private land around Rossland.

### What are your project's main objectives?

Your larger goal should be divided into smaller objectives.

While a goal is broad and overarching, an objective is SMART:

- *Specific*: The objective states exactly what you plan to accomplish.
- *Measurable*: You will be able to measure the results and know when you've realized your objective.
- *Achievable*: You can realistically do the tasks required.
- *Relevant*: The objective will help you achieve your overall goal.
- *Time-bound*: The objective includes specific target dates.

For example, your objective might be the following:

- By the end of year one, we will have provided a two-hour health and nutrition program to 125 mothers.
- Between June and July 2016, we will have constructed 20 bat houses and installed them in specified high-need rural areas.

### How will you evaluate your success?

Now that you have your objectives, consider how you'll measure their impacts. For example, you may:

- track attendance at events
- send out a survey
- do research.

Also think about how you'll know if you've attained your overall goal.

Consider whether these evaluations will cost money. For example, do you need to hire someone to conduct a survey? Make sure to include these costs later on in your budget.

If you apply for a project grant, the funder may ask to see these evaluations, along with lessons learned and recommendations.

## 5. What are your future plans?

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Community needs can be addressed in several ways:

- with a one-time project
- with a multi-year or ongoing program
- with a shorter-term pilot project that may turn into a multi-year or ongoing program.

Consider where yours fits in.

If you're planning a multi-year or ongoing program, think about how the program can be sustained. Are you, your supporters and your funding sources committed over the long term? If not, is the program worth starting? How might your needs change from year to year? Develop some strategies that will help you keep the program viable over time.

## 6. How will you carry out your project?

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### What actions will you need to take?

Now that you know exactly what you want to achieve, consider how you'll achieve it. What actions will you need to take to achieve your objectives and overall goal?

List these actions step by step, along with how you will measure their success.

What is the timeline for your project? Set a start date and an end date for each action.

How much will each action cost? (See the next section for ideas of the costs you might incur.)

Also list who specifically will oversee and carry out each action.

Use a table like the following to organize your thoughts. (Visit [ourtrust.org/?ddownload=4564](http://ourtrust.org/?ddownload=4564) to download all three of this section's tables in an Excel spreadsheet.)

Objectives	Actions or Activities	Measureable Outcomes	Timeline	Cost	Who Will Oversee the Activity?

### What is your budget?

#### Budget step 1: How much will your project cost?

The overall project and the activities you described in the previous step may have an associated cost.

For example, you may have to:

- hire staff or a project manager
- pay contractor and other fees

- train volunteers
- buy supplies
- rent equipment
- lease office space
- travel within the Basin
- print and distribute brochures
- develop a website
- obtain permits
- purchase additional insurance.

Make sure the expenses are realistic, while also leaving room for unexpected costs. You don't want to underestimate what it will cost to deliver the project, but you don't want to overinflate expenses either.

Round off amounts to the nearest dollar. Add all your expenses together.

Use a table like the following to organize your thoughts. (Visit [ourtrust.org/?ddownload=4564](http://ourtrust.org/?ddownload=4564) to download all three of this section's tables in an Excel spreadsheet.)

Project Expenses	Total Amount Required
<b>Administration and Overhead</b>	
<b>Contract Fees and Staff Wages</b>	
<b>Capital Purchases, Equipment Rental and Project Supplies</b>	
<b>Promotion and Advertising Costs</b>	
<b>Travel, Training and Other Costs</b>	
<b>Total Expenses</b>	

**Budget step 2: Where will the funding come from?**

There are two ways to meet the expenses listed above:

1. You pay money for the labour, service or material.
2. Someone donates the labour, service or material for free or at a reduced cost. This is called an in-kind or volunteer contribution.

Even though you may be getting the labour, service or material for free, you need to include the *value* of it in your funding sources. In other words, if you had to pay for it, how much would it cost?

List all the organizations, groups, individuals and others who may be providing either money or in-kind/volunteer contributions to your project. Include sources that have already confirmed their contributions and sources you're waiting to hear from or plan to approach.

If a source's contribution will be used primarily for a specific purpose (for example, to pay the rental fees on a piece of equipment), mark this down.

Round off amounts to the nearest dollar. Add all your funding amounts together, including both money and the value of in-kind and volunteer contributions.

Use a table like the following to organize your thoughts. (Visit [ourtrust.org/?ddownload=4564](http://ourtrust.org/?ddownload=4564) to download all three of this section's tables in an Excel spreadsheet.)

Funding Source	Cash or In-kind?	Confirmed (Y/N)	Amount/ Value	Contribution to Be Used Primarily for What Purpose?
<b>TOTAL FUNDING</b>				Funding and expenses <i>must</i> equal.
<b>TOTAL EXPENSES</b>				

### Budget step 3: Is your budget balanced?

It's very important that the total expenses you calculated in step 1 equal the total funding amount you calculated in step 2. The table in step 2 will automatically show you if this is the case.

If these are not equal, a funder will not consider giving you a grant.

- If your expenses are higher than your funding amount, you won't have enough money to complete the project. Consider finding additional funders or reducing your costs.
- If your expenses are lower than your funding amount, you have more money and contributions than you need. Consider asking for less.

## 7. What is your project description?

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Earlier on, you jotted down notes on these points:

- what you propose to do
- where the project takes place
- when it will start and how long it will take

- who it will benefit
- why this project is important.

Now that you've had more time to think about your project, revisit your answers. Update them to make sure they reflect your project accurately.

Now compile these answers into a short description. Be brief: write only a couple of paragraphs.

This description should clearly summarize your project so that potential funders can quickly understand what it's about.

## 8: Where can you get funding?

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By following the steps above, you now understand exactly what your project is about and what your needs are.

If you've determined you require outside funding, it's time to find and approach potential sources.

Do your research. Pay attention to where organizations with similar projects are obtaining funding. Ask your partners and supporters for ideas. Look on funders' websites and download their application guidelines.

- Make sure the source supports your kind of project.
- Make sure it provides the kind of support you need: for example, you may need a grant for your short-term project, you may need funding for ongoing operations or you may need capital funding for a large, one-time expense.
- Make sure you're eligible: Are you located in the right area? Are you the right kind of organization?

Check the funder's website for a list of previously approved projects. These will give you a good idea of what kinds of projects are successful.

Call the organization to ask any questions and to make sure you and your project are eligible.

Remember to make careful note of deadlines.

Don't change your project to fit a funder's requirements. If your project has been well thought out, you'll want to find a funder who will support it as is.

### **Do you think your project may be a fit for the Trust?**

- We particularly wish to support projects that address our strategic priorities: [ourtrust.org/about/strategic-priorities](https://ourtrust.org/about/strategic-priorities).
- Visit [ourtrust.org/fund](https://ourtrust.org/fund) to discover which program works best for you.

## 9: How do you apply?

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Now that you've determined possible funders, checked their criteria and perhaps talked to them directly, it's time to write the grant application.

- Check application deadlines and work back from there.
- Read the funder's guidelines—then read them again.
- Be clear about what each section is asking for, and use your notes from the steps above to fill them out.
- Make sure you complete each section, including the appropriate signatures.
- Make sure your budget balances.
- Compile all the additional documents you may need: letters of support, maps, licences, etc. Follow the guidelines to see what's permitted.
- Make sure you understand how to fill out the form. Many are now electronic or online.
- Make sure you understand how to submit the completed form. Does it have to be mailed, emailed or submitted online?
- Ask any questions well before the deadline.
- Submit the form by the deadline.
- Remember to keep a copy of the completed form for your files.

In the form, you want to:

- show your passion for the project
- show that you have expertise in this area
- convince the funder that your project's approach will make a difference
- indicate whether your solution is innovative or creative
- describe how you're a good fit for this funder.

Remember to:

- stick to specified word counts
- use full paragraphs or point form as requested
- keep your language clear and simple
- be clear, succinct, factual and professional
- check spelling and grammar
- avoid using jargon or acronyms
- proofread the application, or have someone else proofread it for you.

***Good luck!***