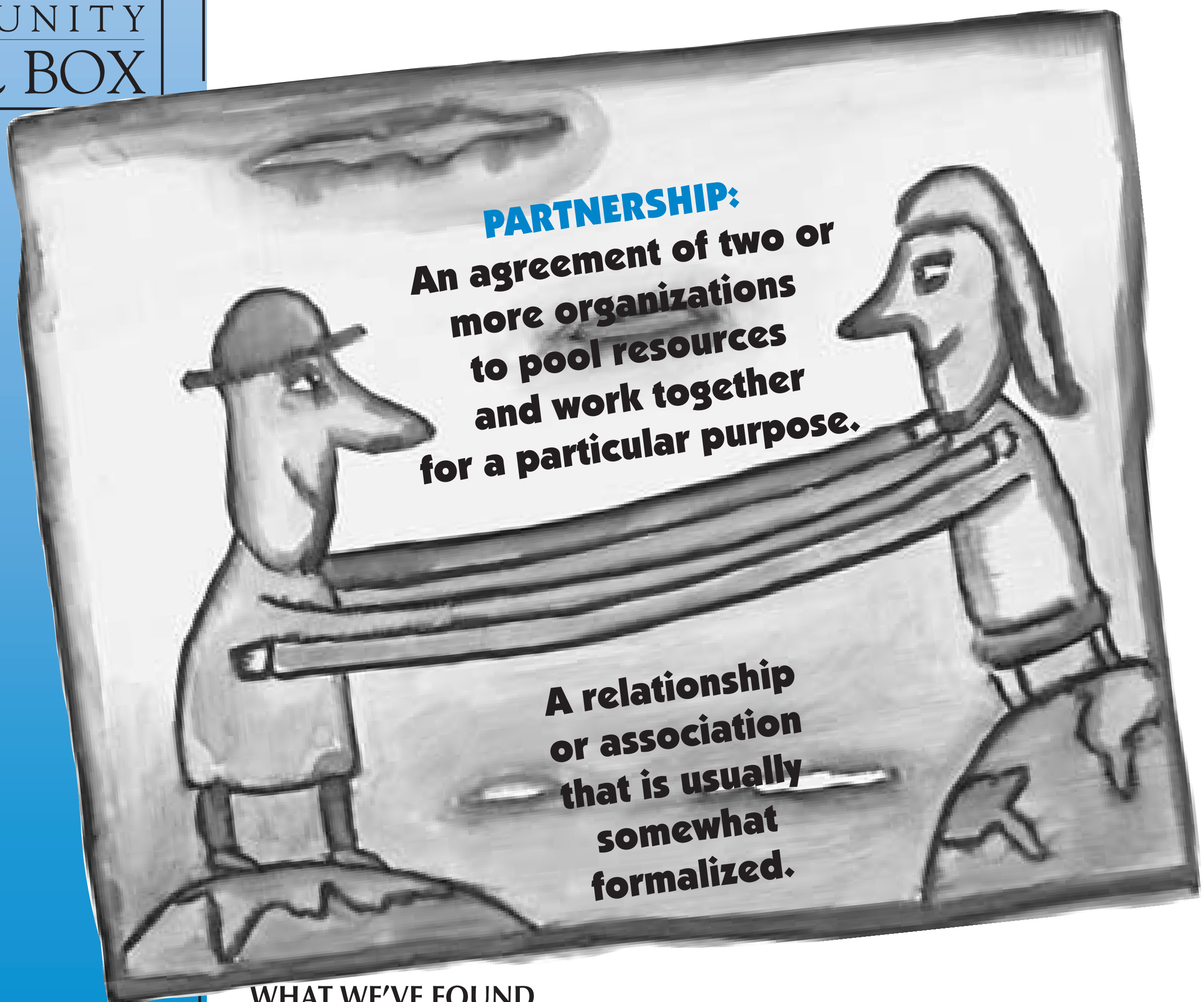
COMMUNITY TOOL BOX

partnerships



WHAT WE'VE FOUND

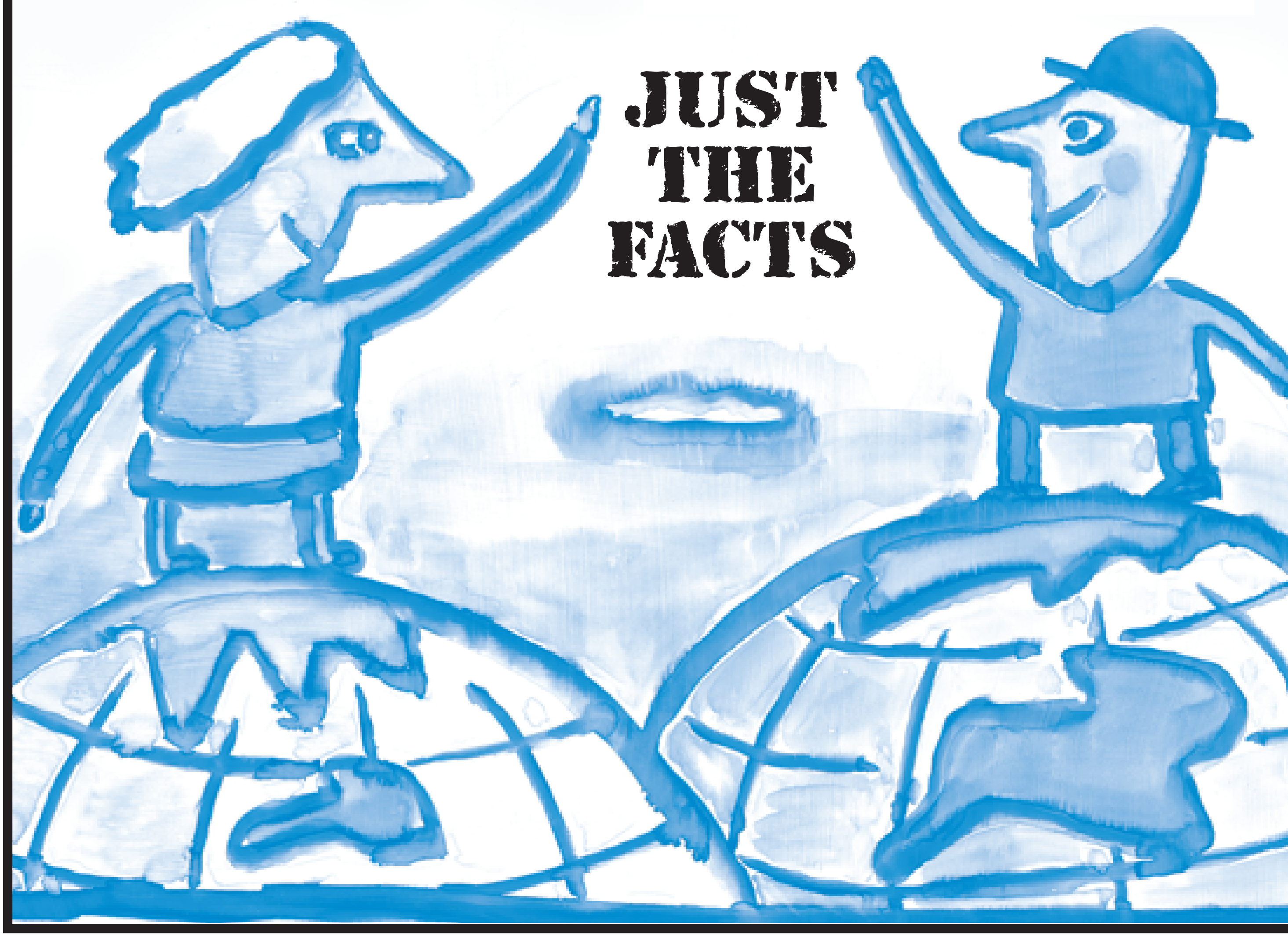
Partnering with other organizations can positively affect any project. Partners bring in more resources, generate extra publicity, and instill a spirit of open dialog even if there are controversial issues. While working in partnerships may be challenging or may seem to impede progress, we believe that projects that are guided or run by multiple parties are generally more successful. Having public support and cooperation of more people and organizations fuels the momentum of a project.

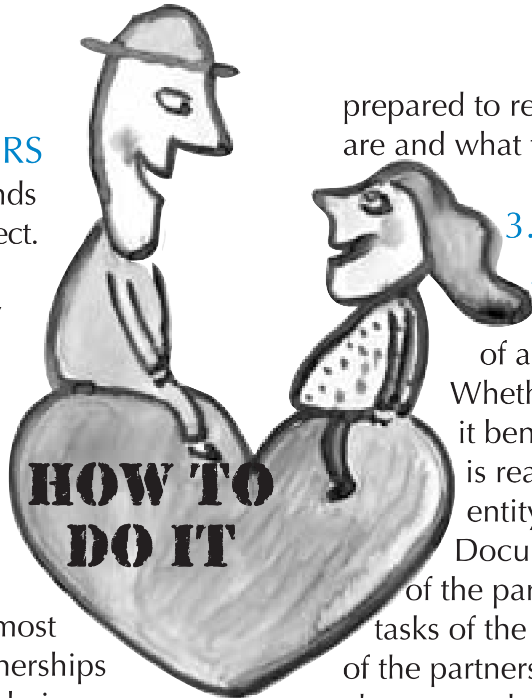
Forming a partnership involves bringing together two or more groups, organizations, companies, or government agencies that are not otherwise connected. The responsibilities of each party and its roles are defined in a written document such as a Memorandum of Understanding (MOU) or a Memorandum of Agreement (MOA).

Partnerships work best if both sides have something to gain. It can be tangible: staff expertise, financial backing, a mailing list, political connections, etc. It can be intangible such as improving a group's image in the community, or it can be a combination of both. Finding partners may be easy or may take some lobbying to show an organization or company how it will benefit from being involved.

Most often partnerships are formed due to mutual interests in the same resource or goals. For instance, a state department of natural resources may recruit a paddlers' group and an anglers' group because both use the same river and feel access is an important issue. The groups may formally agree to participate in a task force, provide copies of their membership lists, provide volunteers for events and meetings, or raise funds to achieve the goals of the project. Partnerships may last just for the duration of a particular project or may evolve into a permanent committee or authority that has on-going management responsibilities.

Partnerships do differ from sponsorships. While partners share responsibility for getting work done for the duration of a project, sponsors financially back, and may assist in planning, only a specific event. The sponsor's interests may be to gain goodwill and generate positive press about itself as opposed to long-term interest in a resource.





1. IDENTIFY POTENTIAL PARTNERS

Choosing partners depends upon the stage of the project. If it is at the beginning, brainstorm a list of every potential group, government agency, and business that may have a potential interest in the community or resource project. Do not limit the list to only those who have similar missions and goals; the most creative and fruitful partnerships may bring together less obvious parties or even longstanding adversaries.

If it is at the end of a project, use the work generated when formulating an "Action Agenda", which is an annotated list of proposed outcomes. Each action identifies what needs to be done, who is going to do it, how it will be done, and when it will be done. Those identified under "who" are potential partners.

2. RECRUIT

Schedule initial meetings with potential partners to provide background information on the project, work plans, schedules, etc. Clearly present both what you hope they can contribute and how that partner stands to gain. Do not give up too quickly if a potential partner does not respond. Some may need more time to think it over or seek approval from others in their office, or they may want to see if the project is going to succeed. Continue to go back and re-invite those who at first declined. Always be prepared to restate your case: what the goals are and what the mutual benefits will be.

3. DEFINE ROLES AND RESPONSIBILITIES

The format and formality of a partnership can vary widely. Whether it is simple or complex, it benefits everyone if an agreement is reached beforehand about each entity's role and responsibilities. Document in writing the purpose of the partnership and the roles and tasks of the various partners, the duration of the partnership, and provisions for making changes to the agreement including adding or releasing partners or dissolving the partnership. Negotiate any points of contention so that there is consensus.

Prepare a written document detailing the partnership in a Memorandum of Understanding (MOU) or a Memorandum of Agreement (MOA). Include a formal coversheet that summarizes the agreement and includes signatures for each partner's president, director, or chief executive officer.

4. HOST A SIGNING CEREMONY

Invite the press, partners' staff and members, and key stakeholders to witness the signing of the MOU or MOA. Ask politicians and each of the signers to deliver short speeches; this is a great opportunity for them to publicly show their support. Ideally, hold the ceremony at the resource, such as on a riverbank or at a park. Take plenty of photographs and videotape the speakers for future outreach materials and publications.

Use It If…

- You are pursuing goals that will affect other people and organizations.
- You need more resources, whether financial, political, or human, to accomplish your goals.
- You want a strong coalition that shows how interests are in agreement.
- You are aware of several strong interest groups that have already voiced opposition to any efforts and want to formalize their participation in the planning process.

Forget It If…

- You are running a small project and your agency or group owns the land, no one else uses it, and you have all of the needed resources to accomplish your goals.
- You really just want a stamp of approval on what you're doing. Partners may bring in their own opinions and recommendations in exchange for resources, and you have to respond.

Timing is Everything

Partnerships can be formed at any time during the planning process as needs arise and as interests are expressed.

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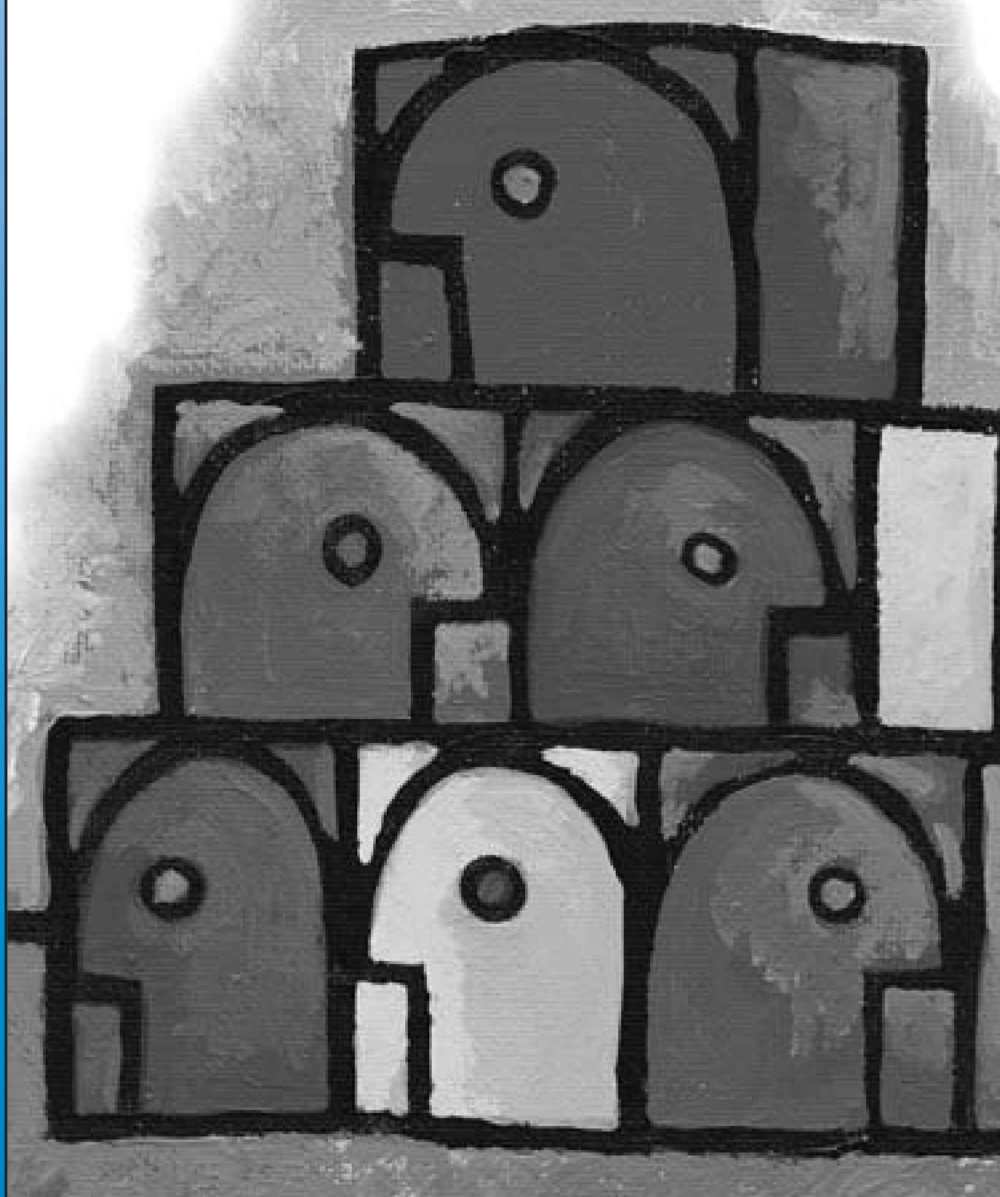
PROJECT STEPS

COMMUNITY TOOL BOX

PROJECT STEPS: A series of activities that rely on community involvement to accomplish an objective.



WHAT WE'VE FOUND

Every planning project is different.Each area has its own unique resources, special people, distinct opportunities and obstacles, and other qualifying characteristics. Yet we have found that all projects are stronger if they follow a common course and emphasize public involvement. Whether a project is a multi-year venture or a single, focused action, the time and effort to follow these steps will more likely yield success.

JUST THE FACTS

A "project" can be many things. It may be a specific action such as building a waterfront park or restoring a historic theater. It may be a large, comprehensive effort like writing a greenway management plan or creating a 233-mile statewide trail system. The work may begin with an individual who has an idea for improving his or her community. Very often projects are initiated by grassroots organizations or government agencies based on a group's mission, long-range plans, or a legislative action.

Regardless of its scope or its origination, virtually every project affects people: people who use the resource, live by the resource, have feelings about the resource, and have ideas about the resource. Because these are the same people who will make the project a success or failure, it is helpful to establish an open process whereby the community has opportunities for input and is kept informed on decisions and progress. If the initiator or project leader is, or is perceived to be, an outsider, it is even more valuable to find out what those who live in a community know and think.

HOW TO DO IT

1. GET THE COMMUNITY INVOLVED

Include the public throughout the course of a project by making them part of the information gathering and decision making process. Form a task force to act as a governing body; recruit volunteers to help in outreach or for special events; and plan and host gatherings such as workshops or meetings. Raise awareness about the planning effort through presentations, press releases and other written and verbal communication tools.

Each of the following steps relies upon bringing together a broad cross-section of individuals and organizations. This is important for making sure diverse interests are represented; it is also crucial for building support and developing a strong constituency.

2. UNDERSTAND THE RESOURCE

Document the natural, historical, cultural, archeological, recreational and scenic resources; public services; population and socioeconomic characteristics; facilities and transportation patterns or other information that affects the intrinsic value or negatively impacts a resource. Organize and document the findings in reports, posters, brochures, guidebooks, or maps that highlight key information and can be easily distributed throughout the community.

3. DEFINE GOALS

Goals are based on both issues and the characteristics of the resource and should reflect the attitudes of the people who live near by and/or use the resource. Brainstorm a large list, even if they are not all realistic. Try to rephrase negative concerns and issues into brief, positive statements. Group similar goals together and write summary statements. Be careful about getting bogged down in finding the perfect words; yet make sure that everyone in the room agrees with the phrasing.

4. IDENTIFY ISSUES AND OBSTACLES

Determine what threats and challenges are currently facing a resource or making it difficult to accomplish the projects goals. Options for collecting this information include hosting a community-wide meeting or an intensive workshop for a group of stakeholders, holding focus groups, and conducting surveys. Understand the common issues and develop summary statements that can be realistically addressed.

5. CREATE AN ACTION AGENDA

Working with a task force or other gathering of stakeholders, begin to consider alternative ways to achieve the identified goals. Brainstorm ideas and be open to new ways of doing things. After collecting a broad range of ideas, begin to determine what actions best suit the resource and its needs and goals. Select a few high priority actions that seem the most likely to succeed and reserve the rest for consideration at a future date. For each action, identify who is responsible, how the work will be accomplished, and when it will be done.

When it is complete, review it with all of those who participated in defining the issues, goals, and actions. Also consider publishing highlights in a brochure, writing a press release, making a poster, or other means to share it with the community at large.

WANT TO KNOW MORE?

LOOK IN THE COMMUNITY TOOL BOX FOR ADDITIONAL TOOLS TO HELP WITH EACH PROJECT STEP.

PROJECT STEPS SAMPLE

ISSUES	GOALS	PUBLIC PARTICIPATION	ACTIONS
Shoreline erosion	To improve development practices on floodplains and steep slopes in the watershed.	Arrange tour of eroded sites.	Select design guidelines for landowners and developers. Secure funding to have a publication written and produced for landowners and developers.
Inadequate historic site protection	To protect significant river corridor historic sites.	Community workshop to identify historic structures and their related stories.	Evaluate benefits of federal, state, and local designation programs. Identify program(s) with best potential and conduct survey to identify sites for inclusion.
Lack of recreation trails	To develop a network of close-to-home trails.	Survey community members to determine trail needs of the potential users.	Identify suitable trail locations. Establish citizen trail organization. Apply for state and federal grants to design and build trail system.

Use It If…

- You want to build consensus among people who have different viewpoints because the community will be ultimately responsible for implementation and ongoing management decisions.
- You are trying to draw a lot of attention to a resource and its value in the community.
- You would like to show accomplishments and results.

Forget It If…

- You cannot find anyone who has an invested interest in the resource or the process.
- You need immediate action because the resource is under a single, direct threat.
- You are using the process only to create the appearance of openness and have no intention of using the out comes.

Timing is Everything

Depending on a project's scope and objectives, these steps can be done in one extensive workshop or over the course of several months or even years, in the sequence given here or another order. If the project changes, or new threats or opportunities emerge, consider redoing some or all of the steps.

Project Steps is based on RIVERWORK BOOK*, written and published in 1988 by the Philadelphia Office of the National Park Service's Rivers and Trails Program.*

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COMMUNITY
TOOL BOX

Task Forces

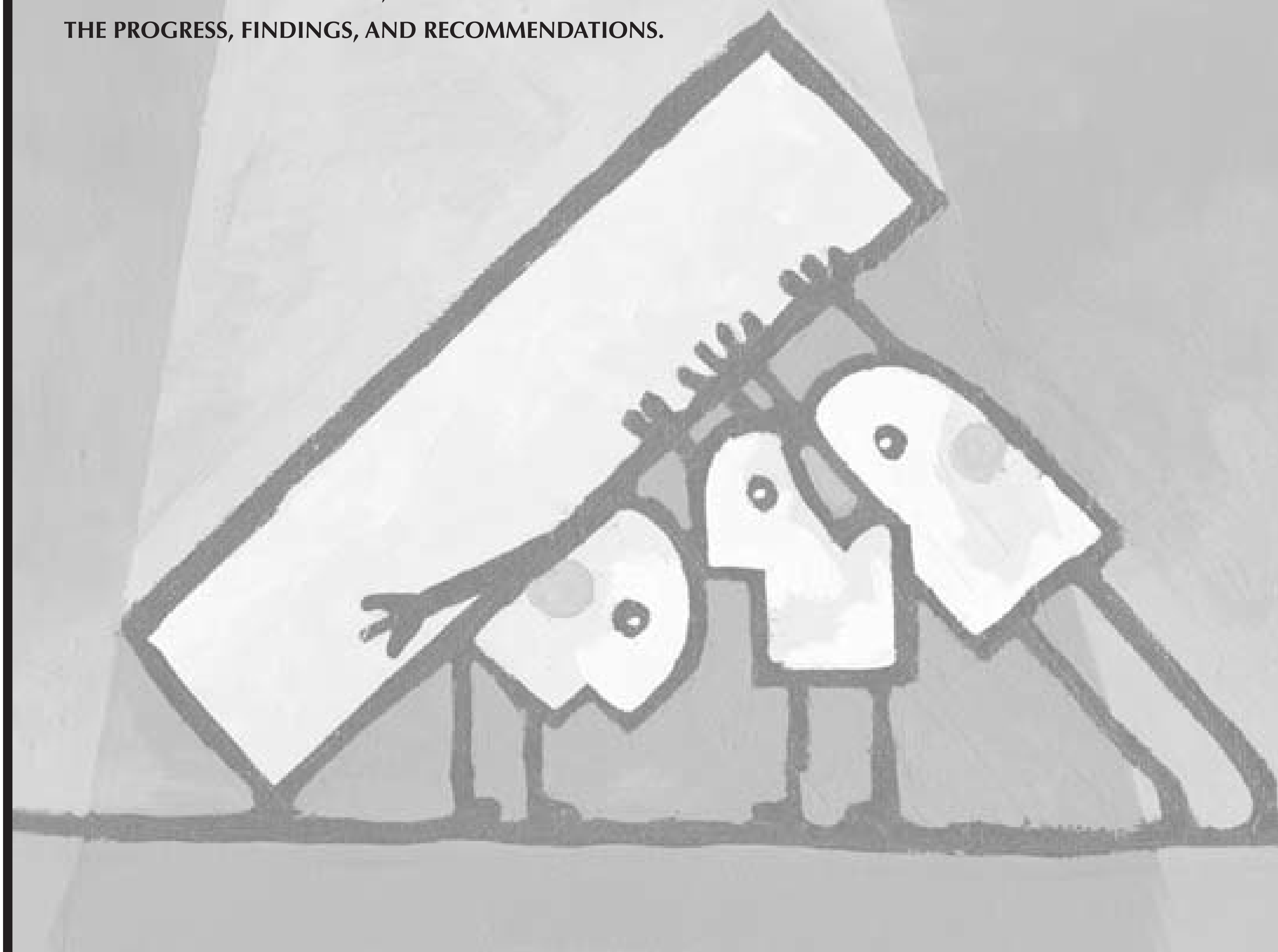
WHAT WE'VE FOUND

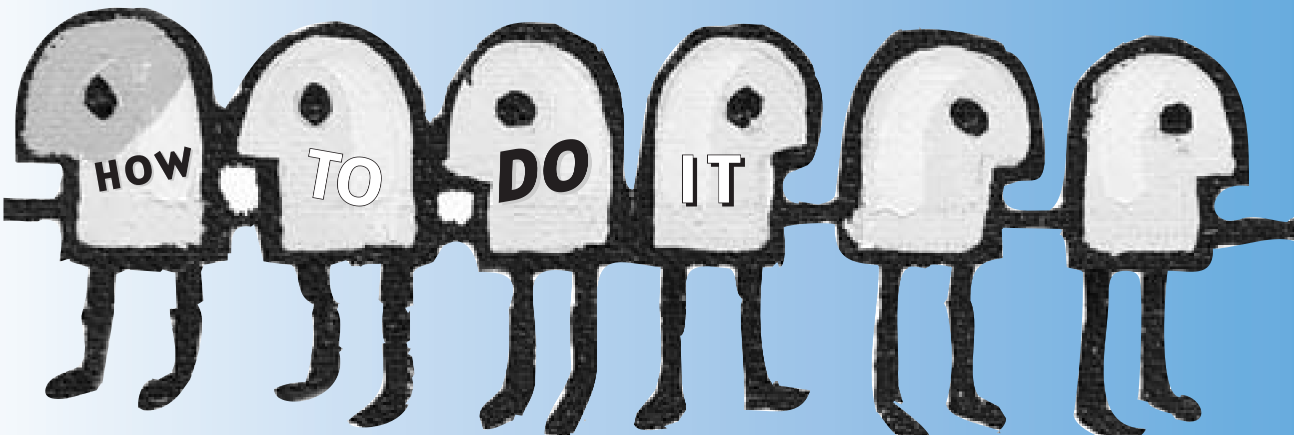
Task forces play a vital role in the strength and success of a project. The members serve as important links between a project team, such as a government agency or non-profit group, and the community at large. They also serve valuable roles such as planning events, public speaking, recruiting volunteers and supporters, working with elected officials and fundraising. After a project is completed, this core group can form the basis for a permanent organization that continues overseeing planning and stewardship efforts in the area.

A TASK FORCE CAN BE APPOINTED TO OVERSEE A PLANNING PROCESS, THE COMPLETION OF A STUDY OR THE IMPLEMENTATION OF A PROJECT'S RECOMMENDATIONS AND/OR SITE DEVELOPMENT. MEMBERS ARE APPOINTED, RECRUITED, OR VOLUNTEERS. THEY SHOULD REPRESENT A BROAD CROSS-SECTION FROM THE COMMUNITY INCLUDING BUSINESSES, LANDOWNERS, INTEREST GROUPS, GOVERNMENT AGENCIES, AND OTHER STAKEHOLDERS. THE MORE DIVERSITY REPRESENTED ON A TASK FORCE, THE MORE LIKELY THE COMMUNITY WILL ACCEPT THEIR DECISION, ESPECIALLY IF THE PROJECT IS CONTROVERSIAL.

THE ADVANTAGES OF USING A TASK FORCE ARE THAT THIS SMALLER SUBSET IS OFTEN BETTER ABLE TO DISCUSS AND COME TO AGREEMENT ON ACTIONS. TASK FORCE MEMBERS ALSO BRING TECHNICAL EXPERTISE, POLITICAL SUPPORT, FINANCIAL BACKING, AND/OR CONNECTIONS FOR RECRUITING OR SOLICITING OTHER VOLUNTARY CONTRIBUTIONS.

BESIDES "TASK FORCE," GROUPS MAY USE TITLES SUCH AS ADVISORY COMMITTEE, STEERING COMMITTEE, OR WORK GROUP. IT ALL DEPENDS UPON THE GROUP'S PURPOSE AND FUNCTION. A TASK FORCE MAY HAVE DECISION-MAKING AUTHORITY, WHEREAS AN ADVISORY COMMITTEE ACTS AS A REVIEW BOARD, OR A WORK GROUP OVERSEES FUNDRAISING ACTIVITIES FOR A PUBLICLY HELD AND MANAGED RESOURCE. REGARDLESS OF THE FOCUS OR THE NAME, THIS GROUP IS USUALLY ACCOUNTABLE FOR INFORMING THE PUBLIC ABOUT THE PROGRESS, FINDINGS, AND RECOMMENDATIONS.





1. Define the Task Force's Role

- What is the mission of the group?
- Is this group going to be responsible for overseeing the actual elements of the project or act more in an advisory capacity?
- What is the lifespan of the group? How will it be determined when the work is completed and the mission achieved?
- How much time commitment will people need to make including large meetings, subcommittee meetings and actual assignments?
- Will training sessions be offered or trips to other communities that have done similar work?
- Will members be compensated for travel expenses or other costs incurred while performing duties?

2. Recruit Members

Memberships may be open to the public or made by invitation or appointment. However it is done, it is vital that the group reflect many interests. For instance, make sure someone is there to represent business people, elected officials, landowners, conservation groups, recreation groups, historical and cultural groups and technical areas such as scientists, engineers or lawyers. Look for members who are, or were in the past, active in the community such as serving on boards or hosting events. Ask people for referrals. You want people who have shown commitment to hard work but who are also not over-extended.

3. Organize the Group

The first time the Task Force meets is the time to establish ground rules and make key decisions. For instance

- Who will act as a facilitator and key contact person?
- Who will fill other key roles: secretary, treasurer, etc.?
- How will the group discuss topics and make decisions such as determining what defines a quorum for a majority or do decisions need to be unanimous or can there be consensus with disagreements documented?
- How will the group communicate outside the meeting? Should a telephone calling system be established or do all members have email? How should meeting summaries be mailed: electronic or regular?
- Can subcommittees consist of non-task force members as long as task force members lead them?
- Will all meetings be open to the public or only key ones such as reporting on findings or discussing goals, issues and alternatives?
- In looking at the project schedule, what are the key tasks that need to be done and by what date?

4. Set a Meeting Schedule

An effective task force should meet regularly to assure continuity. Establishing a regular schedule such as the third Thursday of the month helps everyone better plan. It is always easier to cancel a meeting than it is to find a common date people are free. If possible, meet in the same place to avoid confusion and start-time delays due to people getting lost.

Meetings should always have written agendas with expected results. If meetings will be open to the public, there should be ample notice and advertising in the newspaper or other venues.

5. Never Take Them for Granted

Task force members are, after all, volunteers. They are playing a vital role in helping the success of your project. Don't wait until a planning process is finished to show your appreciation, especially if it is a multi-year project. Send personal notes, give printed shirts, pass out mock awards, sponsor meals or any other tribute that says how much their efforts mean.

At the end of a project, the members should all be publicly recognized for their roles.

Use It If…

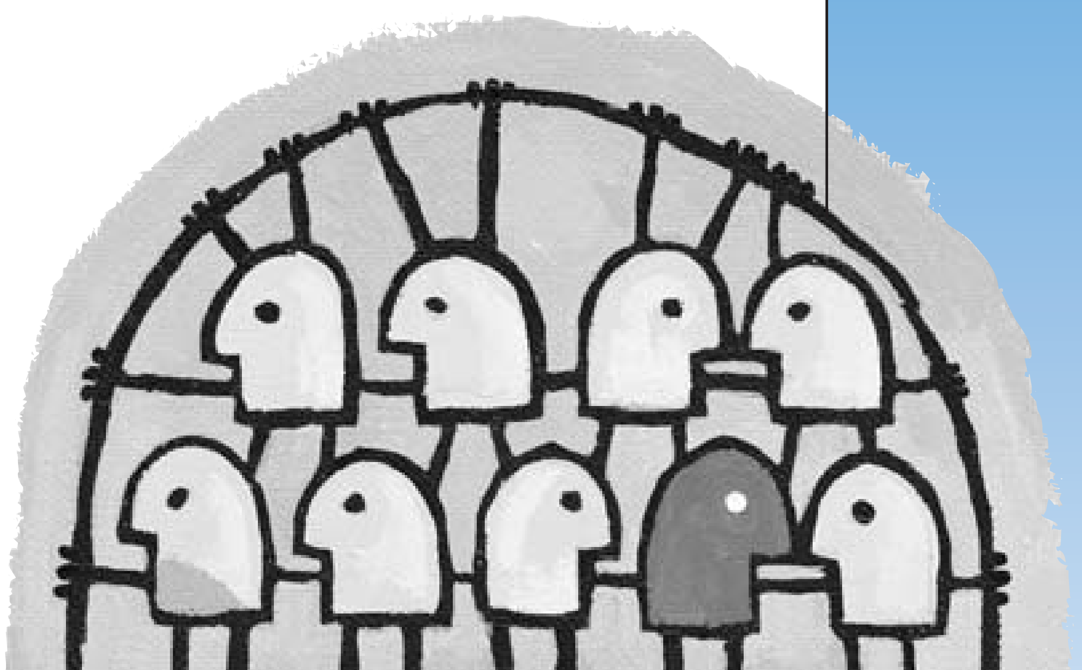
- You need a strong public involvement base for a planning process.
- You are aware of several strong interest groups that have already voiced opposition to any efforts.
- You want to gain a better understanding of issues in the community and build consensus.

Forget It If…

- You cannot get a broad representation of views and citizens. You do not want to set yourself up as only listening to those who agree with you.
- You cannot get volunteers. Rely upon other public involvement techniques and events such as focus groups, conferences and festivals.
- You really just want a stamp of approval on what you're doing. Task Forces may take a project an entirely different direction, and you have to be prepared to listen carefully.

Timing is Everything

A Task Force should be established in the very beginning of a project, before other community outreach is done.



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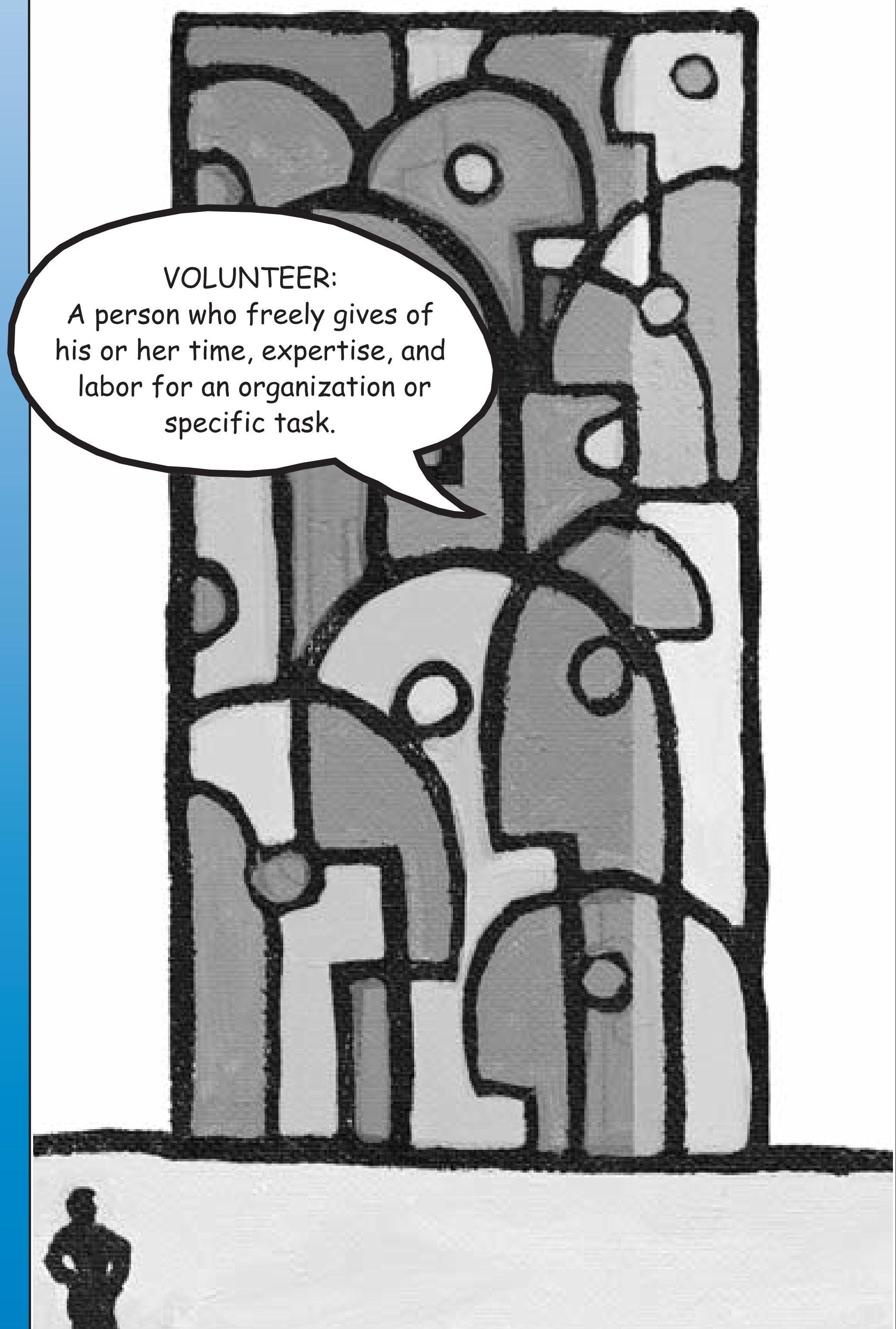
VOLUNTEERS



WHAT WE'VE FOUND

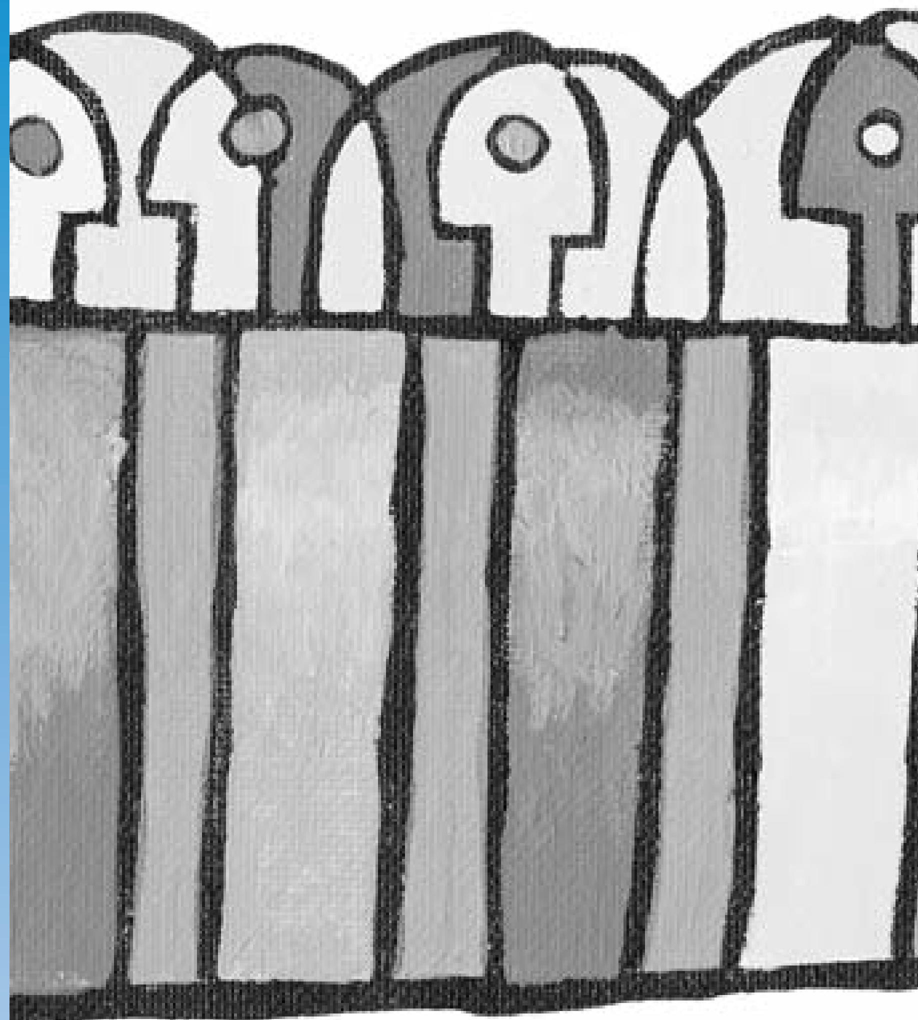
Never underestimate the value of volunteers! A single volunteer with a strong vision can cause more change in a community than any government agency or organization. We have seen time and time again how important volunteers are to projects, and how they can make the difference between success and failure. Whether they volunteer out of passion or are specifically recruited for their expertise, they are contributing players that should be offered opportunities for training and growth and never be taken for granted.

JUST THE FACTS

Volunteers can be young or old, come from any background, have any amount of experience or educational training, be part of the community or be visitors, have a lot of time to give or only a little. As volunteers they might sit on a task force, run an event, fundraise, contribute pro-bono services, attend a focus group, participate in a workshop, walk in a trail-a-thon or paddle in a canoe-a-thon, managea database, photograph the resource for an inventory, join a speakers' bureau, clean up a park, produce a newsletter, or any number of jobs that are relevant to the project and its goals.

By seeking out a diversity of individuals, a project stands to gain increased credibility, input of new ideas, and broader community support. By including a large number of volunteers, more work can be accomplished and there is less chance of volunteer burnout. To do either requires time, effort, and good management. Many organizations and government agencies have fulltime volunteer managers.

Soliciting feedback from volunteers is helpful for improving the volunteer program and volunteers' experiences. Ideas are also abundantly available online and in books. In addition, it may be helpful to contact other volunteer groups to coordinate recruitment efforts and get suggestions.

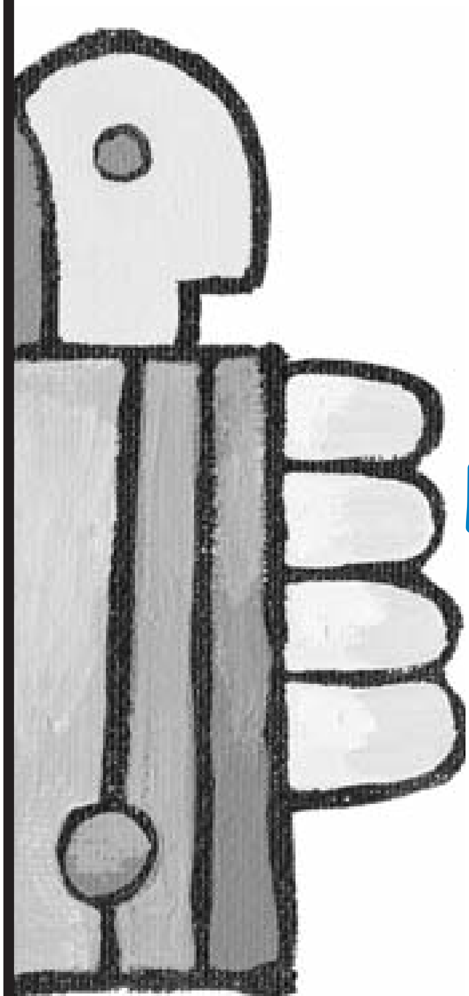


1. Generate a list

- Tap into partner organizations' volunteers and/or membership lists.
- Ask current volunteers for referrals.
- Contact existing volunteer agencies like the National Youth Service Affiliates Program, the American Association of Retired Persons (AARP) Volunteer Talent Bank, local Girl Scout or Boy Scout troops, church groups, and schools including colleges and universities.
- Look through the yellow pages or professional directories to find people with specialized training such as landscape architects, planners, transportation engineers, park and recreation managers, and other natural and cultural resource experts.

2. Recruit

There are two approaches to follow: **one** is to broadly recruit through signup sheets at public meetings, festivals, and locations where there is a display about the project. Broaden the effort even more widely by advertising in newsletters, web sites, and newspapers and running public service announcements on the radio or cable TV.



The **second** is to define specific skills and talents that are needed for a particular task and then search for the people who have those skills and talents.

Whichever method is followed, be sure to answer the volunteer's unspoken question: "Why should I volunteer for you?" Respond to this by including in your recruitment materials the group's vision, history or background information, potential roles for volunteers, time commitments, and how to get more information. The number one reason why people do not volunteer is they are not asked.

HOW TO DO IT

3. Train

Volunteers will be ambassadors for the organization or project, so they need to be familiar with goals, philosophies, objectives, etc. Plan to share this information through a formal orientation. It can range from a multi-day session to a short meeting. Orientations give volunteers the opportunities to get excited about the group or project, to meet other volunteers, to get questions answered, and to address specific skill areas. This is also a great time to show volunteers how much their contributions are appreciated.

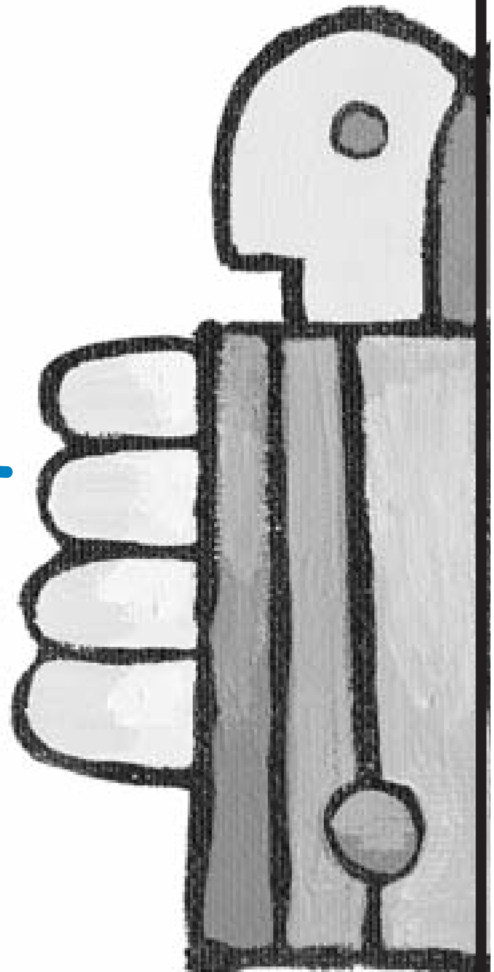
4. Assign meaningful jobs

Any task that a volunteer is asked to perform should be integral to achieving the goals of the project. Try to match up a person's skills and interest with available jobs. Also try to match the task with the amount of time the volunteer has available.

To clarify expectations, provide volunteers with written job descriptions and any other appropriate information such as deadlines, contact numbers, references, supplies, etc. Review the job and answer questions. Be careful of assuming everything is clear and okay.

5. Manage

Continuously seek new ways of managing the volunteer program. The best way to do this is to get feedback from the volunteers themselves. Get their suggestions



for changing procedures, altering job descriptions, improving communication, acknowledging service, and avoiding burnout. If it seems only a handful of people are doing all of the work, figure out why. Rotate people among jobs so that multiple volunteers know how to do the same task in order to avoid individuals from becoming too territorial, to encourage continuous learning of new skills, and to get fresh ideas.

As part of the management program, create volunteer records and reports that show progress such as how many hours worked, tasks completed, people reached, etc. Share these reports with administrators, volunteers, and other stakeholders. Issue a press release when volunteers have donated 100 hours or achieved an important objective.

6. Recognize, praise, and reward

- Celebrate every volunteer and their contribution. This should be done publicly and often.
- Don't wait until the end to show your appreciation, especially if it is a multi-year project. Send personal notes; write a reference letter and/or letter to a boss or family; give printed shirts or hats; pass out awards; offer full credits in printed, electronic, or film productions; throw a party; issue certificates; or any other tribute that says how much their efforts mean.

Use It If…

- You need to get work done.
- You are building a strong, inclusive public involvement campaign and want to be able to attract a diversity of people.
- You want to accomplish more work than your own resources can handle.
- You have a clear vision and defined actions.
- You need specialized expertise for a specific task that does not require a large commitment of time.

Forget It If…

- You do not have real jobs for volunteers either because the project is so well staffed or is so simple that everything can be done relatively quickly and easily.
- You cannot find anyone who is interested.
- You have not decided on a vision that can be used to attract volunteers and determine what needs to be accomplished.
- There is no one with the time or the interest to coordinate volunteers and their activities.

Timing is Everything

Use volunteers throughout a project. Continually recruit new volunteers to infuse energy and ideas and help avoid burnout.

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WORK *Plans*

WHAT WE'VE FOUND

Doing work plans can be tedious. It may feel like an exercise in futility projecting what work needs to get done and when. The fact is, writing a work plan does not waste time; it saves time. By documenting clearly defined tasks, we know where we are at any moment, what needs to happen next. We can show a work plan to others and gain their understanding and support. We can also celebrate milestones along the way, which can be very motivating especially on long projects.

WORK PLAN: A LIST OF TASKS NECESSARY TO COMPLETE A PROJECT.

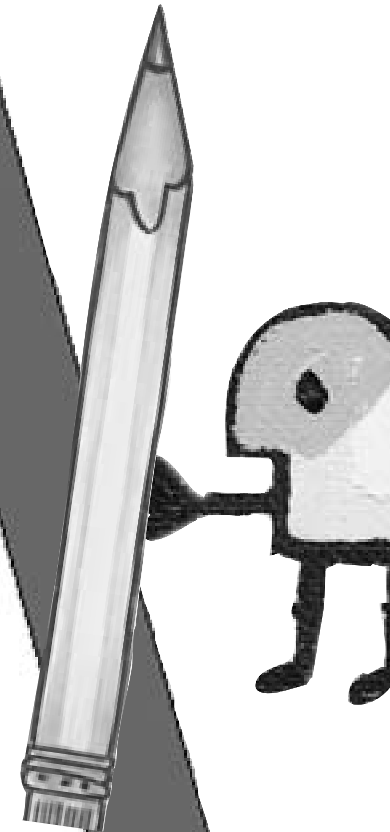
JUST THE FACTS

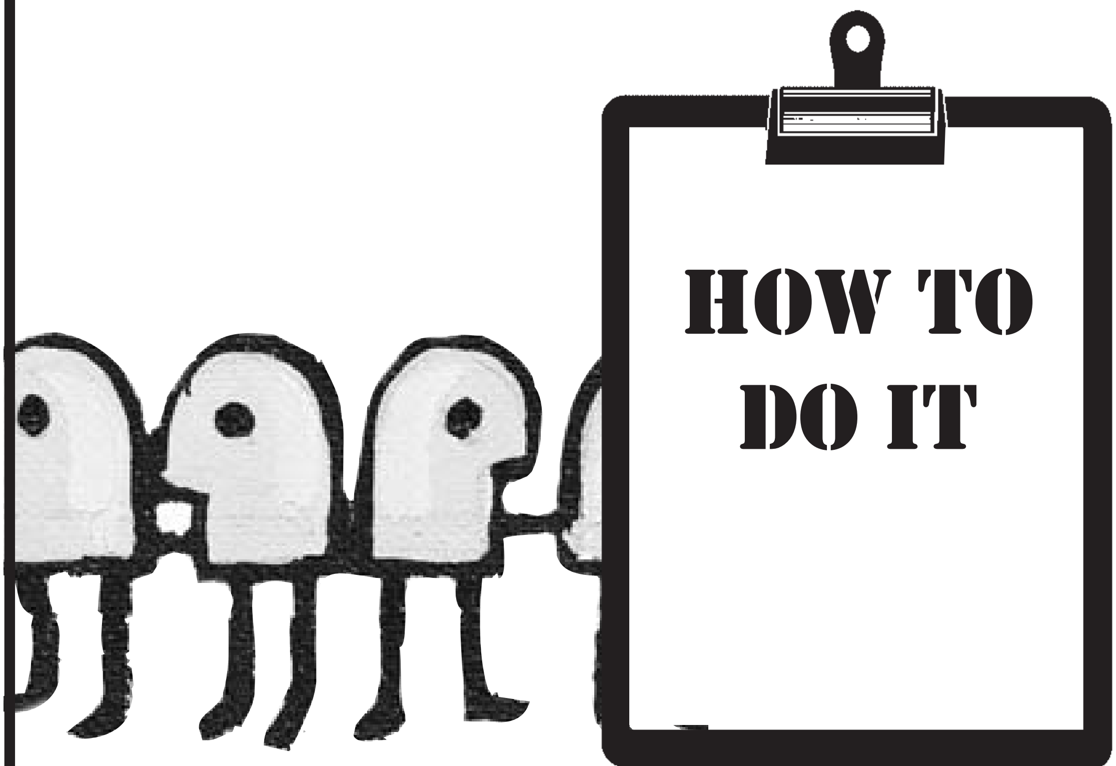
Work plans organize tasks. **A task** is a job, a single unit of work that is easily identifiable and measurable: either it is done or it is not done. Tasks are listed sequentially with other tasks, which is called scheduling; some tasks may also occur simultaneously with other tasks.

Milestones are the end-points reached after completing several related tasks. For example, host a river festival might be a milestone within a work plan. To accomplish it, there are major tasks, subtasks, and minor tasks. "Advertise" is a major task; "Distribute Posters" is a subtask; and "Design Poster" and "Print Posters" are two separate minor tasks, and they may have many steps within them.

After breaking down the work, the amount of time (hours or \work-days) needed to complete each task is estimated and deadlines are set. The final task list is then used for identifying needed resources: people, equipment and materials, and funding.

TO LEARN MORE ABOUT WORK PLANS, *refer to books on project management. There are also several different software programs that simplify the mechanics of creating work plans. The programs range in functions and features, and cost, so it is worth looking at several different ones.*





1. Identify the tasks
Using the defined purpose of the project, ask the question, "What needs to be done in order to complete this project?" Make your answers the milestones of the project. After looking at the big picture, begin to break-down each milestone into tasks.

This first step can be done by the project leader alone, with a group like a task force, or by the leader and then reviewed with a group including key stakeholders. It is important to note that identifying tasks is not the same as developing a vision or goals. In fact, if the project has strong public involvement, each of those would probably be a task: define vision with task force, hold public meeting to brainstorm goals, etc.

2. Make a schedule
When the tasks are identified, begin to assign relationships among them. What needs to happen first? What can happen simultaneously?

3. Print it to share
A diagram like a "flow chart" or "time line" indicating milestones and associated tasks is great information to share with others. Consider printing a brochure to include it with background information, pictures of the resource, and how people can get involved. Write a press release highlighting the work that will be done. Hold an informational meeting to give community members a chance to raise questions and learn more about the project.

4. Use it to manage
Depending upon the complexity of the project, the work plan may need to go through several revisions. With each new modification, clearly indicate the date and version number both in the electronic file name and on the printed document. This keeps a history, makes it easy to trace changes, and helps everyone to stay working on the same page.

As work progresses, make sure deadlines are being met, or if not, determine why. Also make sure that time and efforts are being expended just on those activities that directly relate to achieving each of the milestones and thus completing the project.

Use It If…

- You are ready to launch a new project.
- You are projecting what resources are needed, both human and financial, to complete the project by dead line.
- You will be managing and coordinating other people and want a guide that keeps everyone on the same page.
- You want to generate enthusiasm in the community and be able to show a realistic timeline.

Forget It If…

- You have only one or two tasks, not a large project.
- The project is not clearly defined. If you do not know what ultimately needs to be accomplished, you cannot identify tasks to get there.

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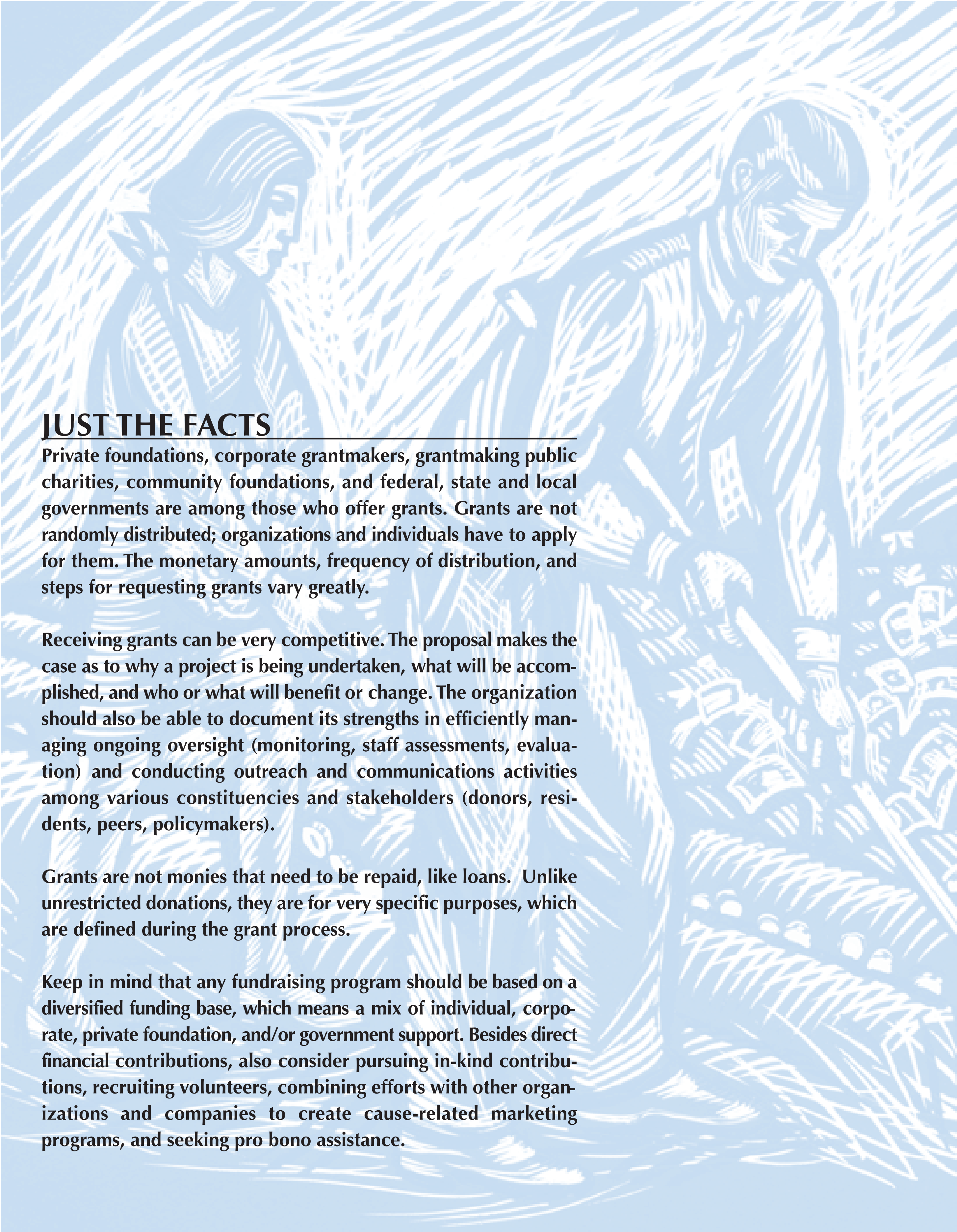
GRANT:

A financial award for a specific purpose given to an individual, nonprofit organization, or government program.

G R A N T S

WHAT WE'VE FOUND

Money makes the world go around—and it certainly helps people realize goals whether hiring staff for an educational outreach program, designing and planting a landscape, producing and installing signage, purchasing a tract of land, or any number of projects. When a group is able to get two or three highly visible projects funded, it becomes easier to attract new partners and garner valuable media attention. Completing a grant process takes hard work, but it's worth it when funding is awarded and ideas are turned into reality.



JUST THE FACTS

Private foundations, corporate grantmakers, grantmaking public charities, community foundations, and federal, state and local governments are among those who offer grants. Grants are not randomly distributed; organizations and individuals have to apply for them. The monetary amounts, frequency of distribution, and steps for requesting grants vary greatly.

Receiving grants can be very competitive. The proposal makes the case as to why a project is being undertaken, what will be accomplished, and who or what will benefit or change. The organization should also be able to document its strengths in efficiently managing ongoing oversight (monitoring, staff assessments, evaluation) and conducting outreach and communications activities among various constituencies and stakeholders (donors, residents, peers, policymakers).

Grants are not monies that need to be repaid, like loans. Unlike unrestricted donations, they are for very specific purposes, which are defined during the grant process.

Keep in mind that any fundraising program should be based on a diversified funding base, which means a mix of individual, corporate, private foundation, and/or government support. Besides direct financial contributions, also consider pursuing in-kind contributions, recruiting volunteers, combining efforts with other organizations and companies to create cause-related marketing programs, and seeking pro bono assistance.

1. MAKE A PLAN
Before beginning any fundraising, write out a fundraising strategy. Identify who to target, how, by whom, and when.

2. RESEARCH
Begin to identify potential funding sources by looking online and through grant-making directories, which are available at many libraries.

Thoroughly research the goals, values and mission of a foundation or government agency in order to link your organizational or project objectives to the funding institution's larger purpose. Look at annual reports for examples of other projects that have received funding. Then select only those donors whose institutional philosophy and programmatic objectives most closely align with yours. Also carefully notate submittal requirements including steps, deadlines, format, number of copies, and contact names.

3. MEET WITH THE FUNDING GROUP
If the application process includes meeting to speak face-to-face, be sure to arrive prepared and ready to show how providing support to your organization is a natural extension of the funding group's own interests. Carefully choose who attends this meeting: a staff person who is an expert in the field, an influential board member, a volunteer who has a connection with the funding agency, a strategic partner in the community, or another person who can both adequately represent your cause and would be of interest to the funding group.

4. PREPARE A PROPOSAL
A foundation or government agency usually has very specific requirements as to what a proposal should contain and how it should be presented. This information may be found in the donor's annual report, on its website, or in another publication. Above all, make sure the proposal is well written and free of jargon and hyperbole.

Common elements found in proposals include:

- ***Executive Summary:***
  A brief description of the need or problem, how the organization intends to address it, an overview of the organization and its area(s) of expertise, funding requirements, and how the program will be sustained in the future.
- ***Organizational Structure:***
  A succinct description of the organization, its history, programs and population served. Provide a few examples of success with related projects, awards received, recognition, etc., to establish credibility.
- ***Needs Statement:***
  A statement of exactly why the project is necessary, why the organization is well positioned to address the problem, and what a grant will enable the organization to do.
- ***Project Description:***
  A detailed description of the project that outlines goals, activities, anticipated timeframe, measurable outputs, staff who will involved in the project, and short- and long-term outcomes.
- ***Evaluation:***
  What you expect to learn from the project and/or how you will measure success. Include data collection and analysis methods and how the results will be disseminated.
- ***Conclusion:***
  A summary that emphasizes why funding is important and why there is a special resonance between this particular project and the funding agency. The proposal should conclude by citing project partners and explaining how the initiative will be sustained over time.

There may be several attachments to the proposal such as a budget that identifies personnel and non-personnel costs associated with implementing a project; earned and contributed revenue; proof of tax-exempt status; the overall operating budget; previous years' audited financial statements; resumes of key staff; and a list of board members and their affiliations.

6. STAY IN TOUCH
If you get the grant, share the good news by publishing a press release and letting members know. Make sure to invite the funding agency to any special event and share any relevant press clippings about the project. The grant will most likely require ongoing evaluations and progress reports, which should be completed as required, on time.

Use It If…

- You have a well-defined project that offers high visibility and sure success and meets a funding organization's requirements.
- You are ready to identify the "who" and "how" of an action agenda.
- You have a board member or volunteer with close ties to a foundation whose program goals align with the group's mission.
- You want to diversify your funding base.

Forget It If…

- You have yet to define a vision, goals, and objectives.
- You do not have consensus on priority actions or the actions are highly controversial.
- You would need to adjust your vision to fit a funding agency's guidelines.
- You are cash-poor and think this money could be used to offset other expenses.

Timing is Everything

Seek grants towards the end of a project or as soon as the planning phase is complete.

RIVERS & TRAILS PROGRAM

National Park Service
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