



## Rule 1: KNOW YOURSELF

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### *Connecting Purpose and Planning*

Rule 1 of The Grantsmanship Game speaks to the heart of the matter, which I call mission-first grantsmanship. Success in grantseeking begins at the beginning: With a deeply held, common understanding of who you are as an organization, what you're here to do in the world, and why it's important.

- “Deeply held” means this understanding is the foundation of everything you do as an organization.
- “Common” means all the stakeholders are marching under the same banner – program staff, administrative staff, board members, volunteers.

Focus first on clearly, concisely and compellingly telling your organization's story and articulating your mission, vision and values. Then and only then will you be prepared to share that story with potential funders.

-- From “Winning the Grantsmanship Game,” p. 10

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## 5. *The Mission-Vision-Values Tree*

**PURPOSE:** When you're playing "The Grantsmanship Game," everything begins with *mission*. At GrantsMagic U, our definition of *mission* is simple and straightforward:

**Your organizational mission is a deeply held, common understanding of who you are as an organization ... what your work is in the world ... and why that work is important.**

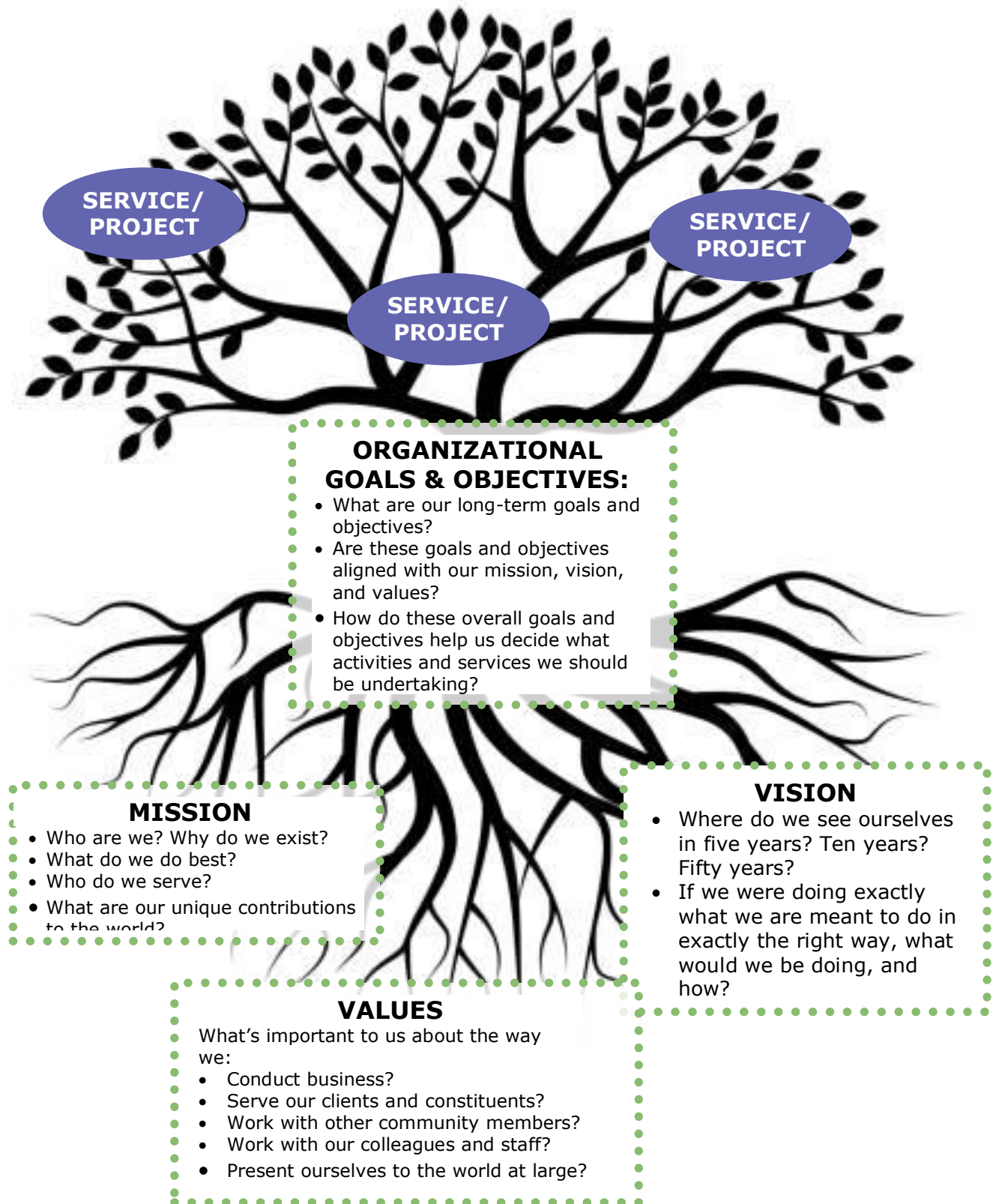
*5. The Mission-Vision-Values Tree* is intended to depict in simple graphic form how mission, vision, and values ideally should work within your organization. The visual image is that of a flourishing tree, busily producing its fruit (your *service targets*) from a healthy, supportive central structure (your *organizational goals and objectives*).

Meanwhile, beneath the surface is the part of the tree that the rest of the world seldom sees or even thinks about – the root structure, your *mission, vision and values*.

Just as the purpose of the tree's roots is to support the tree's growth and serve as a channel for its deep nourishment, your organization's *mission, vision, and values* support the growth and nurture the health of your organization. And everything that your organization produces by way of services and programs grows from and is an essential reflection of your core mission, vision, and values.

**USING THE TOOL:** *The Mission-Vision-Values Tree* is a great conceptual tool to illustrate the importance of staying firmly rooted in and connected with the deepest understanding of your organization's role in the world. It can help tremendously in those times when an enthusiastic board member, for instance, suggests pursuing grants for a terrific new project ... and you can refer to *The Mission-Vision-Values Tree* and have a good discussion about whether that proposed project is in fact in alignment with and a natural outgrowth from the organization's mission, vision, and values.

## 5. THE MISSION-VISION-VALUES TREE



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## 6. *The Mission-Statement Fill-In-the-Blanks Worksheet*

**PURPOSE:** As we learned as we looked at the *Mission-Vision-Values Tree*, when you're playing The Grantsmanship Game, everything begins with *mission*. At GrantsMagic U, our definition of *mission* is simple and straightforward:

**Your organizational mission is a deeply held, common understanding of who you are as an organization ... what your work is in the world ... and why that work is important.**

And just as our definition of *mission* is simple and straightforward, so is the way we think about clarifying and articulating the mission itself.

Keep in mind: Your organization's mission is not something you "create" or "craft." It's already there – in the very heart of the inspiration behind your organization's work. Instead, think of *uncovering or excavating* your mission – finding the words that best, most clearly, most concisely and compellingly express what your work is in the world ... and why that work is important.

*6. The Mission-Statement Fill-In-The-Blanks Worksheet* strips the mystery and muddledness from this excavation process by giving you the exact information you need to be searching for as you bring your mission forth with clarity and power.

**USING THE TOOL:** This is a deceptively simple, extremely powerful tool that can be used any time in your organization's lifecycle.

- For a start-up organization it's hugely valuable to clarify – up front - the core organizing principle behind the new nonprofit around which everything else will be constellating.
- For a nonprofit first setting out into Grants World, this is a critical tool for becoming crystal clear about the message you want to be sharing with prospective funding partners about who you are, what you do, why that work matters – and why they should consider partnering with you.
- For a nonprofit in transition, the tool can bring everyone back to "center" so to speak – by challenging the team to rethink, recalculate, re-articulate, and re-commit to your shared, common organizing principle in an evolving or even volatile environment.

Ideally this tool will be used to guide a team process – with board members, key staff, volunteers, perhaps even community partners – so that it is in fact a discovery, and not a creation.

## 6. MISSION STATEMENT FILL-IN-THE-BLANKS WORKSHEET

	THE PROMPT:	OUR WORKING EXAMPLE:	YOU DO IT!
1	Our organization name:	<i>Literacy Volunteers ...</i>	
2	Location/service area:	<i>... of XYZ County (WA) ...</i>	
3	About us: Credibility, values, type of organization	<i>... is a 35-year-old, volunteer-based 501c3 ...</i>	
4	We do this thing:	<i>... that teaches [adults] to read and write ...</i>	
5	For/with these people:	<i>... adults ...</i>	
6	In order to/so this will happen:	<i>... so they can achieve their full potential as individuals, as employees, as parents, and as members of the community at large ...</i>	
7	Because we believe:	<i>... because we believe everyone deserves the opportunity to learn and grow.</i>	

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## 7-9. *Building Our Organization Case Statement*

**PURPOSE:** One of the essential source documents for every successful grants office is what we call the *organization case statement*. Simply put:

**The *organization case statement* is a one-piece, written document that tells your organization’s story – past, present, and future – the way you and your stakeholders want the story told.**

The case statement is well worth doing well, as you’ll find yourself turning to its language over and over again. Every grant proposal you ever write will require you to answer the question (though not in so many words): “Who are you as an organization, what are you all about – and how do we know we can trust you?” Your case statement provides the answers to this question. You’ll also be able to use it in dozens of other contexts as well – as part of your board orientation manual, when developing a volunteer recruitment notice, in making a presentation to a local service club – in short, whenever you or another stakeholder is called upon to share your organization’s story.

**USING THE TOOLS:** On the following pages are three related tools to support you in developing a strong organization case statement that will serve you well as a primary source document:

- **7. *Building Our Organization Case Statement*:** This will be your primary tool to guide you and your team through the process of uncovering and articulating your organization’s story – past, present, and future.
- **8. *Time-Lining Our Organizational History*:** This worksheet can help you brainstorm the key benchmarks in your organization’s history, year by year, that you might want to highlight in your case statement narrative.
- **9. *Sample Organization Case Statement*:** This example, from Recording for the Blind and Dyslexic, offers a fine model for the structure, scope, level of detail, and clear, vivid “storytelling” of an effective case statement.

Like many of the processes in *The ULTIMATE Grants Toolkit*, using these tools to brainstorm and develop your organization case statement is best done as a team effort. Use the questions on this form to lead you and your colleagues into the information that you might want to include as you shape your organization’s story. Don’t feel constrained by these questions; instead, let them open up your thinking. Much of the information you need is already available, as part of other documents.

## 7. BUILDING OUR ORGANIZATION CASE STATEMENT

A. WHERE WE'VE COME FROM: THE PAST		
1.	Year founded:	
2.	Who were the key founders?	
3.	Why? What primary need were we founded to address?	
4.	What are our key achievements and milestones?	
B. WHERE WE ARE TODAY: THE PRESENT		
1.	What is our mission today? How has it changed over time?	
2.	What key societal need(s) do we address now?	
3.	What are our current priorities?	
4.	Who are our clients? Who do our services benefit?	
5.	What are our major programs, projects, service areas? What are the primary objectives in each?	
6.	What are our key needs for staff? Training? Facilities? Equipment? Other?	
C. WHERE WE'RE GOING: THE NEXT FIVE TO TEN YEARS		
1.	What trends can we foresee in our operating environment – societal, technological, regulatory, etc.?	
2.	How will these trends affect our work?	
3.	What is our vision for the future?	
4.	What new areas will we be working in (new programs, services, clients, etc.)?	
5.	What will be our key needs for staff? Training? Facilities? Equipment? Other?	

## 8. TIME-LINING OUR ORGANIZATIONAL HISTORY

	YEAR 1:	YEAR 2:	YEAR 3:	YEAR 4:	NOW:
<b>Mission/Focus:</b>					
<b>Board Leadership:</b>					
<b>Staffing Level:</b>					
<b>Volunteers:</b>					
<b>Annual Budget:</b>					
<b>Sources of Funding</b>					
<b>Facilities, Space, Equipment, etc.:</b>					
<b>Major Programs and Services:</b>					
<b>Types / Numbers of Clients Served:</b>					
<b>Community Accomplishments:</b>					
<b>Key Honors and Recognitions:</b>					
<b>Key Challenges or Roadblocks:</b>					
<b>Key Organizational Changes or Adjustments:</b>					
<b>Other Key Benchmarks or Notable Events:</b>					



## 9. SAMPLE ORGANIZATION CASE STATEMENT



### ARIZONA UNIT RECORDING FOR THE BLIND & DYSLLEXIC

#### **ORGANIZATIONAL HISTORY**

The late Anne T. Macdonald founded Recording for the Blind in 1948, in New York City. Recording for the Blind's original purpose was to record textbooks for blinded World War II veterans attending college under the G.I. Bill of Rights. Five decades later, the organization has grown into a major national service that operates 32 recording studios across the country with an aggregate volunteer corps of 5,900 highly trained men and women.

In 1995, in recognition of the expanded roles of the organization, our name changed to Recording for the Blind & Dyslexic (RFB&D). Our national logo also evolved, from three closed books with headphones to one open book enclosed with headphones, the outline of which forms a heart. The new logo symbolizes our mission and desire: to open the world of education to people with print disabilities of all kinds.

Each year, RFB&D records more than 4,500 new books on digital media, not only for blind and dyslexic students, but also for anyone who is print-disabled because of a visual, perceptual or physical disability. These new titles augment the Master Library collection that contains 87,000 recorded educational books. It is the largest resource of its kind in the world and is housed at RFB&D's headquarters in Princeton, New Jersey.

The Arizona Unit was established in 1951 and has two studios, one in Phoenix and one in the Sun Cities (Peoria). The administrative office, development department and educational outreach department are located in Scottsdale. Some 350 volunteers, who give over 22,000 hours of service annually, and 11 staff work day and evening shifts to record audio textbooks for thousands of blind and print-disabled students. Last year, some 2,100 individual Arizona borrowers, 50 Arizona schools and school districts, and 91,000 borrowers nationwide used these recorded textbooks.

The Arizona Unit of RFB&D receives no government or United Way funding, and is supported solely through the generosity of local individuals, companies and foundations. RFB&D pays no fees or dues to the national RFB&D Library, so all donated funds stay and work locally.

#### **MISSION, VISION AND VALUES**

Recording for the Blind & Dyslexic (RFB&D), a nonprofit volunteer organization, is the nation's educational library serving people at all academic levels who cannot effectively read standard print because of a visual impairment, dyslexia (learning disability) or other physical disability.

**Mission:** Our mission is to create opportunities for individual success by providing and promoting the effective use of accessible educational materials.

**Vision:** Our vision is for all students to have equal access to the printed word.

**Values:**

- ***Service: We exist to serve our members with high quality Learning Through Listening products and services.*** We are dedicated to making a measurable difference in the lives of people with print disabilities. To ensure excellence in our services, we continuously gather, analyze and learn from member feedback. For every task we undertake on behalf of our members, our personal best is the benchmark of commitment.
- ***Teamwork: We are a single team made up of volunteers and employees committed to learning from one another and serving our members together.*** We collaborate on the development of strategies and plans and we unite behind our organizational priorities, standards and decisions. We are adaptable to change, creative in our approaches and flexible in the way we carry our mission into the future. Our work, our opinions and our ideas are generated in a community of mutual trust and respect.
- ***People: We value and care for our human resources.*** We recognize and respect our diverse backgrounds and experiences and we nurture individual strengths and abilities. We are committed to creating positive and enabling places of work by offering rewarding opportunities for growth and development.
- ***Integrity: We are personally and collectively responsible for maintaining the ethics of this organization.*** We pledge individual accountability for our words, actions and principles. We practice high standards of honesty and fairness as an organization. We value our reputation above all of our assets.

**SERVICES**

**E-Text:** Short for “electronic text,” E-Text describes our method of reproducing and distributing the contents of a book digitally. RFB&D’s 87,000-volume library is the largest educational resource of its kind in the world. Our collection contains a broad selection of titles in all subject areas, from literature and history to mathematics and the sciences. Dictionaries, computer manuals, academic journals and other materials are available in E-Text format. E-Text books also work well with most assistive technology systems such as speech synthesizers and Braille display boards.

**Custom Recording:** RFB&D’s Custom Recording Service is a fee-based service that helps businesses, government agencies and other organizations convert their printed materials into accessible formats for their employees, investors and consumers. Proceeds from this service help fund the recording and distribution of our audio books to our members.

**Scholarships:** Each year, RFB&D presents its *Mary P. Oenslager Scholastic Achievement Awards* to nine blind or visually impaired college seniors. We also present six *Marion Huber Learning Through Listening Awards* to high school seniors with learning disabilities. These students demonstrate outstanding scholarship, leadership, enterprise and service to others.

**Reference:** RFB&D’s reference librarian gives our members assistance similar to that which they would receive in an academic or public library. Our librarian can search RFB&D’s audio and E-Text collections to find titles available in specific subject areas.

Each year, RFB&D distributes nearly 250,000 copies of recorded textbooks from its Master Library collection that contains 87,000 recorded educational books to more than 91,000 individuals who have documented visual impairments, learning disabilities or other physical disabilities. We offer individual memberships as well as Annual Institutional Memberships at a minimal cost to our borrowers. Membership fees contribute approximately 25% of the actual service and equipment costs. Our members include students from kindergarten to graduate school and adults who no longer attend school but use our audio books to pursue professional or personal interests.

**Last year, some 2,100 individual Arizona borrowers, 50 Arizona schools and school districts, and 91,000 borrowers nationwide used these recorded textbooks.**

## **OUR VOLUNTEERS**

**Volunteers are the heart of RFB&D's service.** They are almost every age, from 20-year-old college students to 80-year-old retirees. Many are working professionals who come to the studios after having worked all day at demanding jobs. More and more, RFB&D volunteers are people in advanced, specialized and technical fields. Some are true Renaissance men and women who read a variety of subjects ranging from literature and foreign language to personal computing and the sciences.

Equally important are the monitors who operate the recording equipment and listen via headphones to ensure quality and accuracy while the book is being read. Others work as book preparers and clerical assistants. Because they work as part of a team to meet production schedules and student deadlines, dependability is essential. Generally, volunteers schedule standing appointments on a regular weekly basis (3 hours for day volunteers, 2 hours for evening).

The Phoenix and Sun Cities studios can always use the talents of new volunteers, and the rewards are enormously gratifying. As one RFB&D volunteer commented, "Very few jobs, volunteer or paid, offer the chance to contribute in such an individual and enduring way."

## **FUTURE**

The future of Recording for the Blind & Dyslexic is harnessed to two vital issues – **advancing digital recording technology and Educational Outreach**. Digital and cloud-based products are the media through which RFB&D foresees serving its members/borrowers in the 21<sup>st</sup> century. This technology and a strong Educational Outreach Program, in which educators, parents and students are made aware of RFB&D's services, are the prime issues driving our organization.

**Digital:** Analog technology, used by RFB&D since its inception, requires that a book be read consecutively from beginning to end, generally taking several months to complete. Digital technology allows multiple volunteers to record different sections of a book simultaneously. Completed sections are then compiled and edited in the correct order, and a completed book can be produced in significantly shorter time than with analog recording. Instead of months, audio textbooks can be recorded in weeks, or even days.

Digital technology is clearly a vital step for RFB&D. *The Arizona Unit is one of only five test sites for this new system, and ten of the first digital recording booths in our national system were installed, six in our Phoenix studio, and four in our Sun Cities studio. These booths are now operational and are contributing new books to our national library.* **Digital audio**

**textbooks have been available to our individual and school members since September 2002.**

***Educational Outreach:*** Four years ago, in conjunction with our National Headquarters and the other units of RFB&D, the Arizona Unit embarked on an aggressive Educational Outreach program. This program's mission is to raise community awareness of the importance of early identification and early intervention in diagnosing print and learning disabilities in an effort to provide every student an equal opportunity at educational and professional success.

The Arizona Unit's Educational Outreach staff provides teachers and school administrative personnel with both training materials and an in-service training program so they can better recognize the symptoms of a student struggling to pull meaning from the printed page. In addition, they conduct on-campus parent workshops at the schools. These events are open to any parent who wants to learn more about print-learning difficulties and to explore how they, and their schools, can help their children ***"learn through listening."***

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## 10. *The Fairy Godmother Wish List*

**PURPOSE:** *10. The Fairy Godmother Wish List* is designed to help you and your colleagues begin the process of mission-centered grantsmanship by answering the question:

**What would you love to build, buy, create, develop, expand, hire, do, to further your organization in its mission – if money were no object?**

The ideas gleaned from this process are like seeds – ungerminated, all potential. They are the raw material from which your strategic planning and grants development will emerge.

**USING THE TOOL:** *The Fairy Godmother Wish List* is a team process. Every stakeholder in your organization should be invited to take part – board members, executive leadership, program and support staff, volunteers, your partners in the community, and those you serve. Encourage your team to keep their thinking open, to have fun, to let the dreams really come alive – to take off the brakes. There's nobody looking over your shoulder criticizing your ideas – the only constraint is that each idea in some way *further your organization in its mission*.

P.S. Use \$10,000 as a starting point for your fairy godmother grant – but don't hesitate to raise the limit if it works better for you to do so!



**NEXT STEPS:** Once you've gleaned the wish lists from all your team members, your next step is to shuffle them all together and begin to apply some reality checks, in the form of the next tool – *11. Prioritizing Our Project or Resource Ideas*.

## 10. THE FAIRY GODMOTHER WISH LIST

Great news! Your favorite fairy godmother has just granted you a check for \$10,000! You can use the money for anything that will advance your organization's mission. How many ways can you spend your windfall?

[illegible]

## 11. Prioritizing Our Project or Resource Ideas

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**PURPOSE:** This next worksheet, *11. Prioritizing Our Project or Resource Ideas*, takes the ideas generated through *10. The Fairy Godmother Wish List* to the next level of development and evaluation. Because it simply isn't possible to do everything that shows up on our wish list (nor should we necessarily, even if we could), it becomes important to sort through and prioritize – to have a process for determining which of the ideas is most worth the investment of time, money, and energy that they will require.

**USING THE TOOL:** Just as generating the ideas in the first place was a team process, so to is the process of sorting and prioritizing.

With your team, start by listing down the left-hand side each of the ideas generated on your *Fairy Godmother Wish Lists* – each of the projects, creations, expansions, new or continued undertakings. Now for each item on the list, ask each team member to assess it on a scale of 1 to 5 on three factors:

- **Mission match:** To what degree is the idea congruent with or supportive of the organization's mission?
- **Urgency:** To what degree is there a critical time frame involved – something that must be done sooner rather than later, a situation that will become worse if not tended to, or an opportunity that will be lost?
- **Importance:** Finally, to what degree would this idea have a significant, long-term impact on the organization's future or that of the community or constituency you serve?

Add up the numerical ratings and sort the project ideas from highest to lowest, and voila! – you have a prioritized wish list – a clearer sense of the resources that will best support your organization in working toward its mission and fulfilling its vision – and are one step closer to having a strategic plan for your grantseeking.

## 11. PRIORITIZING OUR PROJECT OR RESOURCE IDEAS

Please help us decide what projects or services to focus on in searching for funding! Each of the following ideas has been suggested as a possible change, enhancement, addition, or expansion for our agency, *if resources were available*. Please prioritize all ideas in terms of their relative importance for our agency.

On a scale of 1 (low) to 5 (high), rank the degree to which you believe each of the ideas:

- Is congruent with and/or advances the mission of our organization;
- Is urgent (i.e., has a critical time frame; vital that it be undertaken sooner rather than later);
- Is important (i.e., potential for major long-term impact on our operations or services).

#	PROJECT OR RESOURCE IDEA	MISSION MATCH	URGENCY	IMPOR-TANCE	OVERALL



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## 12-13. The “Magic Wand” One-Page Proposal Template

**PURPOSE:** GrantsMagic U’s “*Magic Wand*” *One-Page Proposal Template* (called the Magic Wand for short) is one of the mightiest tools available to you as a successful grantseeker. When it comes to transforming good ideas into fundable project concepts, this worksheet is the closest thing available to a magic wand. Very simply, it’s designed to help you develop and keep track of good ideas for fundable projects, even before you begin your funding research. In effect, you create an “inventory” of fundable project concepts. This inventory serves three important purposes:

- First, it helps you target your funding research more effectively by allowing you to plan in advance what *kinds* of projects you’ll be researching for funding.
- Second, if completed properly, it can give you a head start on actually developing a final proposal, by helping you think through the key elements of your project idea.
- Finally, your Magic Wand projects can serve as mini-proposals for potential funders who like to “shop” for a project to support with your agency. (It does happen -- really!)

**THE TOOLS:**

**12. The “Magic Wand” One-Page Proposal Template:** This is the basic worksheet showing the 10 key planning questions that every proposal needs to answer – and that, therefore, need to be at the core of your planning from the very beginning.

**13. Magic Wand Fill-In-the-Blanks, with Prompts:** This worksheet follows along with our free training (see below), adding in both the example we share and the specific “prompts” to use as you’re bringing in the information for your own project.



**NEXT STEPS:** Take GrantsMagic U’s free video training course, “The Quick-Start Guide to the One-Page Grant Proposal.” This free on-demand course shows you exactly how to put the Magic Wand one-page template to work for your organization (with lots of student success stories about grants awarded – of up to \$300,000! – just on the basis of a one-page proposal). Did I mention it’s free? Sign up now and watch any time: [Go.GrantsMagic.org/QSG](https://Go.GrantsMagic.org/QSG)



**GO DEEPER:** Following the blank templates you’ll find two completed Magic Wand one-page proposal worksheets, to give you solid examples of good thinking from which to draw as you work on your own Magic Wand projects.

- **Literacy Volunteers:** Reading tutor training program (p. 49)
- **Pima County Parks:** Historic preservation, restoration, and education (p. 50)

## 12. THE “MAGIC WAND” ONE-PAGE PROPOSAL TEMPLATE

1	IN ONE SENTENCE, summarize your project idea. What will you do? When? With whom? Where? And why? In order to what?	
2	Who are you as an organization, and what are you all about? (What is your mission or purpose?)	
3	Describe the specific need or issue in your community that this proposed project will address.	
4	What specific changes do you intend to achieve in your community as a direct result of your work? What will success “look like”?	
5	What are the major steps you will need to take to make these changes happen?	
6	Who else has a vested interest in working with you as partners on this problem or opportunity?	
7	What information, tools, data, etc. will you use to decide how well you met your success goals?	
8	What resources do you need to do this work? ( <i>Skills, labor, equipment, training, supplies, services, etc.</i> )	
9	Estimated total cost (if you had to pay for every-thing). How does this break down?	
10	What broad categories of community needs or opportunities does your project address?	

## 13. MAGIC WAND FILL-IN-THE-BLANKS w PROMPTS

ELEMENT	EXAMPLE	NOTES
<b>1. In ONE SENTENCE, summarize your project idea.</b>		
When? – Time frame (by, during, etc.)	<i>By March 20--</i>	
Who? - Organization name	<i>Literacy Volunteers of Our County (WA)</i>	
Will do what? Action verb	<i>will train 50 new reading tutors</i>	
Where?	<i>to serve the western communities to the west</i>	
With whom? – Partners, etc.	<i>working with volunteers recruited from local churches</i>	
With what resources? - Optional		
In order to what?	<i>in order to reduce the waiting list for literacy training in this underserved area.</i>	
<b>2. Who are you as an organization, and what are you all about? (What is your mission or purpose?)</b>		
Organization name:	<i>Literacy Volunteers of Our County</i>	
Location (if not clear in name):	<i>(WA)</i>	
Credibility:	<i>is a 35-year-old</i>	
Cultural or “values” ID:	<i>volunteer-based</i>	
Type of organization:	<i>501c3 nonprofit</i>	
Mission:	<i>whose mission is to empower adults with the ability to read and write, in order to achieve their full potential as individuals, as employees, as parents, and as members of the community at large.</i>	

3. Describe the specific need or issue in your community that this proposed project will address.		
Compelling statistic:	<i>According to a 2016 survey by Literacy Volunteers of America, one out of six adults ...</i>	
Use natural language instead of jargon:	<i>cannot read or write at the basic sixth grade level ...</i>	
Tell the story – what that statistic looks like in human terms:	<i>leaving them vulnerable to problems with parenting, employment, health, safety and self-esteem.</i>	
Describe the need or issue in the community you plan to serve:	<i>and in the rural western half of “Our County” alone, there is a waiting list of 200 adults who want to learn to read.</i>	
4. What specific changes do you intend to achieve in your community as a direct result of your work? What will success “look like”? (Ideally find 3 to 5 “success indicators.”)		
Use action verbs:	<i>Train ... Match ... Complete ... Improve ... Reduce ...</i>	
Use numbers to show clear “finish line”:	<i>50 new volunteers 75% of students/6 mo. tutoring 2 grade levels 3 significant partnerships at least 40 individuals</i>	
5. What are the major steps you will need to take to make these changes happen?		
Start with an action verb:	<i>Contract ... Market ... Conduct ... Match ...</i>	
Use the following categories:		
Staffing	<i>Contract with master trainer.</i>	
Logistics	<i>Training logistics: Materials, location, equipment</i>	
Marketing/outreach	<i>Marketing to recruit potential volunteer tutors</i>	
Implementation	<i>Conduct training.</i>	
Follow-through (what’s next?)	<i>Match and track tutor/learner pairs for 6 months.</i>	
Evaluation	<i>Evaluate learner progress and program success.</i>	

<b>6. Who else has a vested interest in working with you as partners on this problem or opportunity?</b>		
Natural or expected partners:	<i>Schools Libraries</i>	
Unexpected/unique partners:	<i>Local churches</i>	
<b>7. What information, tools, data, etc. will you use to decide how well you met your success goals?</b>		
Consider a pre/post measure:	<i>Pre- and post-training reading evaluations of learners</i>	
Keep it simple by "imbedding" evaluation into something you're already doing:	<i>Training logs of volunteer tutors</i>	
<b>8. What resources do you need to do this work? (Skills, labor, equipment, training, supplies, services, etc.)</b>		
Mind-map high-level essentials:	<i>Master trainer Training materials Audiovisual equipment Training site (+ refreshments?) ... (others)</i>	
<b>9. Estimated total cost if you had to pay for everything: How does this break down?</b>		
Estimated total cost:	<i>\$25,000</i>	
Break-down (per person, site, week, quarter, hour, etc.):	<i>\$500 per volunteer trained, matched and tracked</i>	
<b>10. What broad categories of community needs or opportunities does your project address?</b>		
Specific issue area:	<i>Literacy</i>	
Alternate terms:	<i>Reading Adult education</i>	
Nature of service area:	<i>Rural</i>	
"Downstream" impact:	<i>Parenting Workplace skills</i>	
Target population:	<i>Minority issues</i>	
Partnerships:	<i>Churches</i>	

## EXAMPLE 1: Literacy Volunteers of “Our” County

1	IN ONE SENTENCE, summarize your project idea. What will you do? When? With whom? Where? And why? In order to what?	By March 20--, Literacy Volunteers of “Our” County (WA) will train 50 new reading tutors to serve the rural communities to the west, working with volunteers recruited from local churches, to reduce the waiting list for literacy training in this underserved area.
2	Who are you as an organization, and what are you all about? (What is your mission or purpose?)	Literacy Volunteers of “Our” County (WA) is a 35-year-old, volunteer-based 501c3 whose mission is to empower adults with the ability to read and write, in order to achieve their full potential as individuals, as employees, as parents, and as members of the community at large.
3	Describe the specific need or issue in your community that this proposed project will address.	<b><i>In our community, the current situation is this:</i></b> According to a 2016 survey by Literacy Volunteers of America, one out of six adults cannot read or write at the sixth-grade level, leaving them vulnerable to problems with parenting, employment, health, safety and self-esteem. And in the rural western half of “Our County” alone there is a waiting list of 200 adults who want to learn to read.
4	What specific changes do you intend to achieve in your community as a direct result of your work? What will success “look like”?	<b><i>We intend to achieve the following specific outcomes:</i></b> 1. Train and successfully match 50 new volunteers. 2. At least 75% of students will complete 6 months of tutoring. 3. Reading skills will improve an average of 2 grade levels. 4. At least 3 significant partnerships with local churches. 5. Reduce waiting list by at least 40 individuals.
5	What are the major steps you will need to take to make these changes happen?	1. Contract with master trainer. 2. Training logistics: Materials, location, equipment. 3. Marketing to recruit potential volunteer tutors. 4. Conduct training. 5. Match and track tutor/learner pairs for 6 months. 6. Evaluate learner progress and program success.
6	Who else has a vested interest in working with you as partners on this problem or opportunity?	Local churches                      Libraries Schools                                Service clubs??
7	What information, tools, data, etc. will you use to decide how well you met your success goals?	<ul style="list-style-type: none"> <li>• Pre- and post reading evaluations of learners</li> <li>• Training logs of volunteer tutors</li> </ul>
8	What resources do you need to do this work? ( <i>Skills, labor, equipment, training, supplies, services, etc.</i> )	Master trainer Training materials Audiovisual equipment Training site (+ refreshments?)
9	Estimated total cost (if you had to pay for every-thing). How does this break down?	\$25,000 (\$500 per volunteer trained, matched and tracked)
10	What broad categories of community needs or opportunities does your project address?	Literacy                                Church-affiliated Reading                                Parenting skills Adult education                      Workplace skills Rural                                      Minority issues

## EXAMPLE 2: Pima County Parks Department

1	IN ONE SENTENCE, summarize your project idea. What will you do? When? With whom? Where? And why? In order to what?	By July 20--, the Pima County (AZ) Parks Department will restore 12 buildings surrounding the Canoe Ranch compound, on the Juan Bautista de Anza National Trail, working with the County Historic Preservation Officer, to provide environmental and natural resource education programs and to preserve for future generations one of Arizona's historic treasures.	
2	Who are you as an organization, and what are you all about? (What is your mission or purpose?)	The mission of Pima County (AZ) Natural Resources, Parks and Recreation is to lead community efforts to conserve the Southwest's Sonoran Desert and enhance the urban environment, while providing quality recreational, educational and leisure activities for the community.	
3	Describe the specific need or issue in your community that this proposed project will address.	<b><i>In our community, the current situation is this:</i></b> The 180-year-old historic Canoe Ranch compound, on the Juan Bautista de Anza National Trail in Southern Arizona, has fallen into serious disrepair due to age and neglect and is in danger of collapsing, losing one of Arizona's historic treasures for future generations.	
4	What specific changes do you intend to achieve in your community as a direct result of your work? What will success "look like"?	<b><i>We intend to achieve the following specific outcomes:</i></b> <ul style="list-style-type: none"> <li>• Rebuild 12 buildings in the ranch compound.</li> <li>• Create 2 environmental education programs in restored buildings for children (preteens and teens)</li> <li>• Create natural resources and interpretive education programs on ranch lands for adults</li> </ul>	
5	What are the major steps you will need to take to make these changes happen?	<ul style="list-style-type: none"> <li>• Work with community volunteers to establish plan</li> <li>• Develop foundation for fundraising.</li> <li>• Build collaborations with State and Federal agencies.</li> <li>• Contract for construction.</li> <li>• Train instructors for educational programs.</li> </ul>	
6	Who else has a vested interest in working with you as partners on this problem or opportunity?	<ul style="list-style-type: none"> <li>• Local communities: Tucson Audubon, Trails Association</li> <li>• Federal agencies: Corps of Engineers, Environmental Protection Agency</li> <li>• State agencies: Game &amp; Fish, State Parks</li> <li>• School districts: Sunnyside, Amado, Sahuarita, Catalina, Tanque Verde</li> </ul>	
7	What information, tools, data, etc. will you use to decide how well you met your success goals?	<ul style="list-style-type: none"> <li>• Construction evaluation will be based on buildings built according to specifications and inspections.</li> <li>• Education programs will be evaluated based on user survey: Pre (expectation) and post (actual learning).</li> </ul>	
8	What resources do you need to do this work? ( <i>Skills, labor, equipment, training, supplies, services, etc.</i> )	<ul style="list-style-type: none"> <li>• Design and construction master plans</li> <li>• Construction materials</li> <li>• Operating supplies</li> <li>• Ranch managers, educators, volunteer coordinator</li> </ul>	
9	Estimated total cost (if you had to pay for every-thing). How does this break down?	\$10,000,000 (\$5 million in Year One; \$5 million in Year Two)	
10	What broad categories of community needs or opportunities does your project address?	Historic preservation Rural Planning Natural resources Southwest history	Trails/Open space Environment Leisure services Outdoor recreation Rural programs