

Program Planning for Grant Writing

February 24th, 2022



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Working with communities in BC's
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& Northern Vancouver Island

*United Way acknowledges
the homelands
of the Indigenous Peoples
of this place we now call
Canada, and honours the many
territorial keepers of the Lands
on which we work.*



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Webinar Instructions

- Everyone will **remain muted; cameras may be on**
- There will be opportunities for questions at various points in the session, as well as a **brief question period** at the end – use the “**Q&A**” feature to ask questions at any time.
- The webinar is being recorded and will be posted on [Healthy Aging CORE](#) – slides will also be made available.



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Webinar Learning Goals

Exploring how to enhance grant writing skills by:

- creating compelling project rationales/needs descriptions
- understanding planning methodologies, including Theory of Change and Logic Models
- incorporating measurable outcomes into planning



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Program/Project Design

- ◆ Why plan?
- ◆ What does planning have to do with grant writing?
- ◆ Whose responsibility is it anyway?



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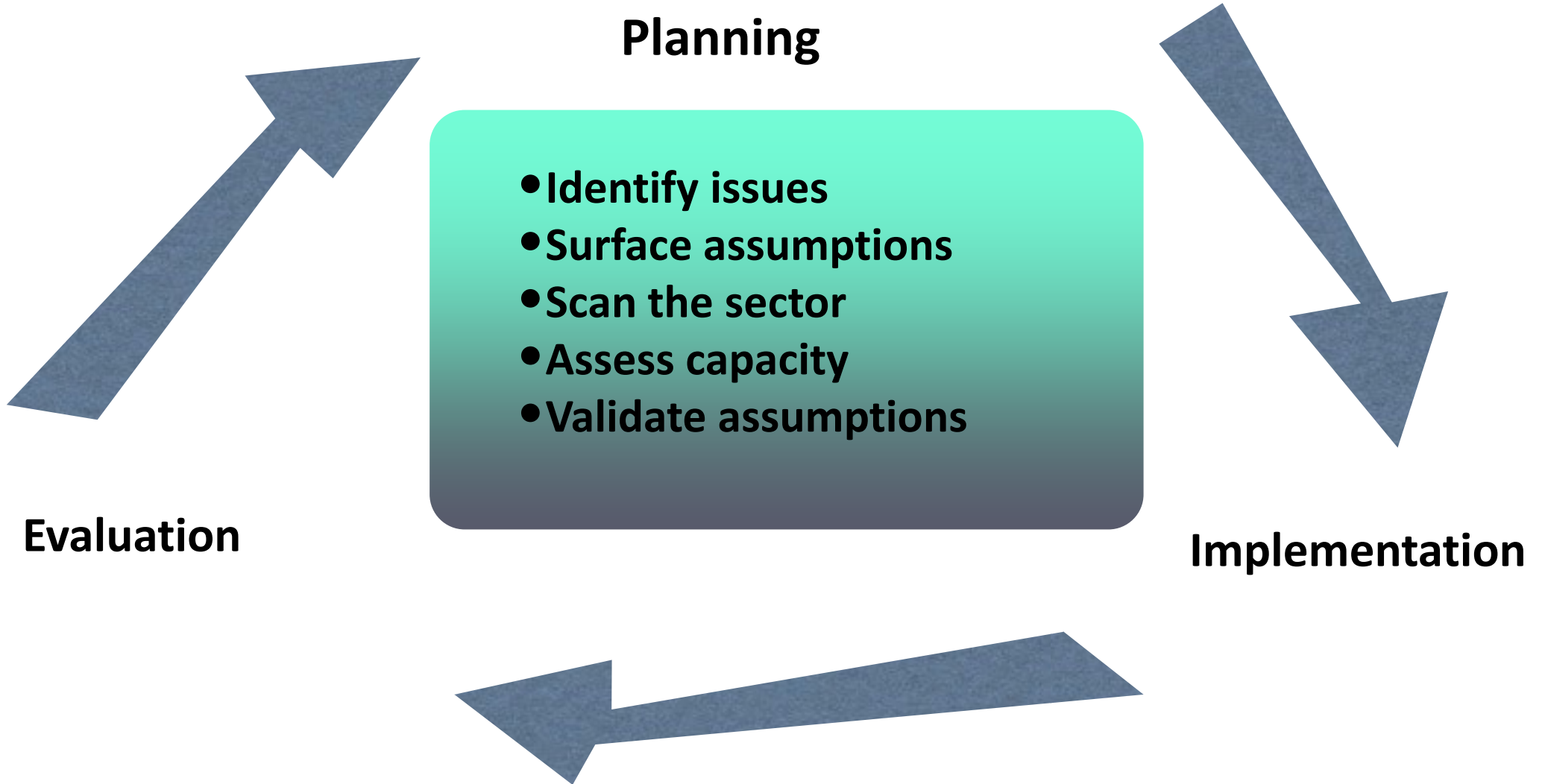
Program Design Process

Planning

- Identify issues
- Surface assumptions
- Scan the sector
- Assess capacity
- Validate assumptions

Evaluation

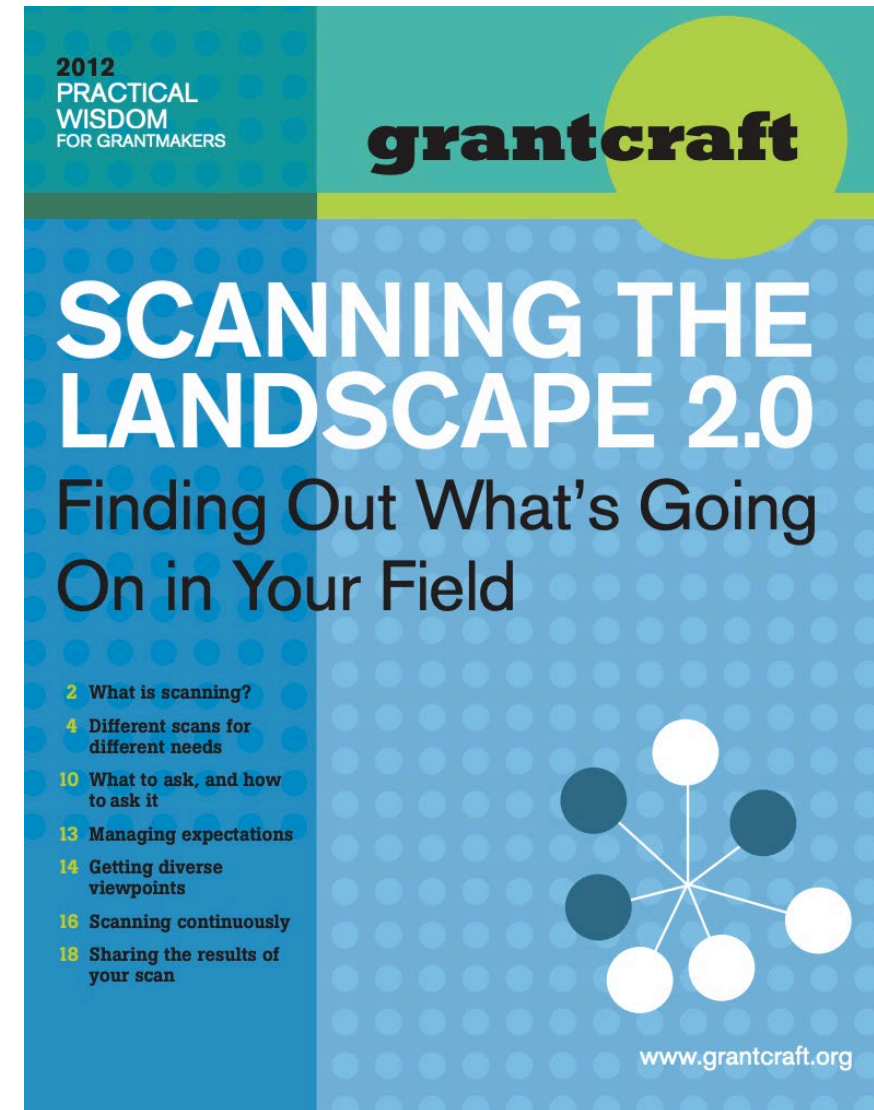
Implementation



Scanning the Sector

May involve:

- ◆ secondary research
- ◆ meetings, interviews
- ◆ surveys
- ◆ convening
- ◆ network and asset mapping



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Look for:

- broader context: awareness, policies, current research, etc.
- key players
- who is affected
- strategies: existing and potential
- gaps and barriers



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Needs Description

Provides rationale for the proposed program or project, and:

- ◆ defines the problem
- ◆ explains its importance and implications
- ◆ demonstrates relationship to organization's mission and mandate
- ◆ validates need, using studies, data, references
- ◆ provides examples to illustrates significance or urgency of the problem



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Creating compelling program rationales involves:

- effective use of research/data (primary and secondary) and stories relevant to issue
- situating organization's role and expertise on issue
- setting the stage for goals, objectives, strategies

No stories without numbers; no numbers without stories...



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Activity:

Numbers and Stories



Tell a brief story that incorporates a number of some kind of significance to help communicate something interesting and important



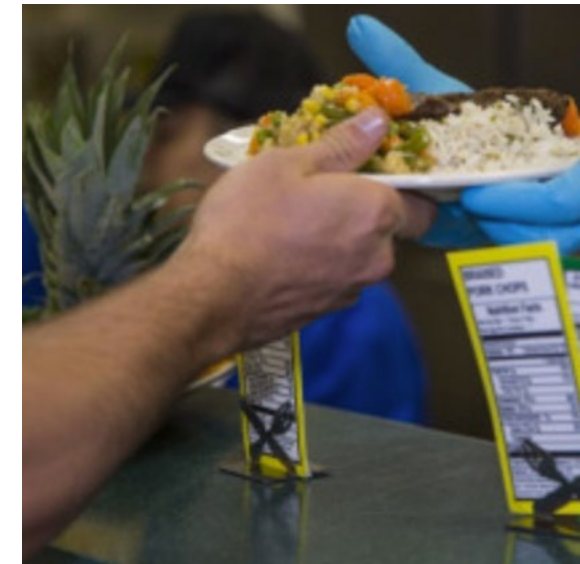
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Significant Number Example

1/3

Over one third of Canadians aged 65 or older are at nutritional risk, making them more vulnerable to frailty, falls, illness, malnutrition, institutionalization, hospitalization, and death. Community programs that offer nutritional supports are essential to the health and well-being of many older adults.



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Use of Data

Primary Data:

- original research undertaken by the organization and designed to meet specific information needs
- qualitative and/or quantitative information collected directly through methods such as surveys, focus groups, interviews, or observation
- targets a specific population group, geographical area, time period
can create baselines for comparative purposes



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Use of Data

Secondary Data:

- data collected by someone else
- usually free and readily available on-line
- public opinion polling companies, Statistics Canada and others may make some of their research available for a fee
- information re-purposed and re-used for specific aims
- may not be as specific to organization's needs as primary data



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Compelling Rationales

Data and Statistics

- Support issue being addressed
- Be relevant to and fit context
- Be timely and current
- Be objective and unbiased
- From reputable sources

Stories and Examples

- Support and be relevant to issue
- Be consistent with the data
- Bring the data to life
- Be authentic and truthful
- Respect privacy and confidentiality



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Planning Approaches

Based on the described need, a program/project plan outlines: goals, objectives, strategies, workplan, evaluation, budget

Common Planning Methodologies:

- Theory of Change
- Results Based Management
- Logic Models



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Goals and Objectives

Goals:

- response to the problem described in the Needs or Issue Description
- a general statement of what the program is expected to accomplish, or
- an answer to the question of what the program is about
- broad, future-oriented and aspirational

Objectives:

- what is intended to be accomplished by a particular time to achieve the program goal(s)
- specific and describe a measurable intent, such that it will be clear when it has been achieved (SMART objectives)
- most project goals will have several different objectives



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Strategies and Outcomes

Program strategies:

- describe how program objectives will be achieved
- are the methods to be used and form part of the workplan
- should be designed to be appropriate, adequate, efficient and effective
- must take the required resources into account, and the context in which the program will operate, as well as any potential challenges

Program results/outcomes:

- the results that will occur when program objectives are achieved
- are quantifiable, measurable and verifiable
- identify and measure short and long term results
- ask “What changed because of the program or project?”



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Evaluation Planning

Evaluation seeks to:

- learn
- Improve
- identify results
- measure impact



An evaluation plan should take into account:

- context
- implementation
- outcomes



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Evaluation Types

- Formative
- Summative
- Developmental
- Participatory or Participant Focus
- Theory- based
- Most Significant Change Technique



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Evaluation Planning Considerations



- ◆ What are the key questions?
- ◆ How will success be measured?
- ◆ How will data be collected?
- ◆ Qualitative/quantitative/both?
- ◆ Formative/summative/developmental?
- ◆ Time frame
- ◆ Ethical considerations?
- ◆ Budget? Capacity?



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Theory of Change

A process of planned change, guided by assumptions about what constitutes effective intervention

Involves identification and probing of:

- the problem or issue
- community needs/assets
- desired results (outputs, outcomes, and impact)
- influential factors
- strategies
- assumptions



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Theory of Change typically:

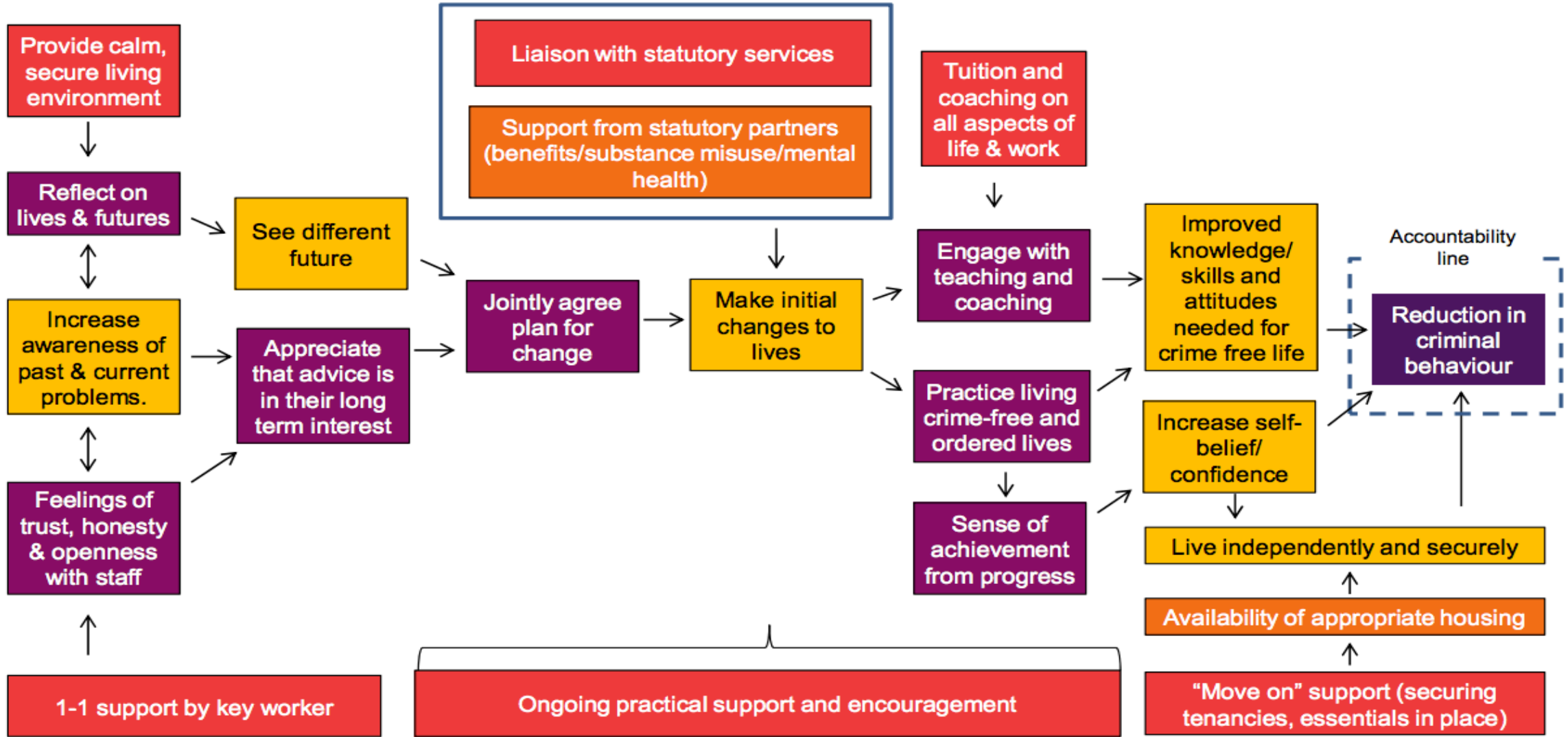
- Shows the big picture and various pathways leading to change
- Describes why and how you think change happens, eg. “if we do x, then y will change because...”
- Presented as a flexible diagram; may include cyclical processes, feedback loops, one box leading to multiple other boxes...
- Narrative text describes why you think one box leads to another
- Used as a tool for program design and evaluation



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Clients referred to the house by probation service: typically have insecure housing and a range of complex needs



Key: Activity (red), Enabling factor (orange), Engagement (purple), Intermediate outcome (yellow), Long-term goal (dark purple)

Results-Based Management

Approach to management focusing organization's efforts and resources on achievement of results, not just completion of activities.

Involves identifying and defining:

- results to be achieved, and activities to meet these results
- potential risks or barriers to program success and how they will be managed
- indicators to monitor and assess results
- lessons learned If the project is not achieving the results hoped for



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Performance Measurement Framework

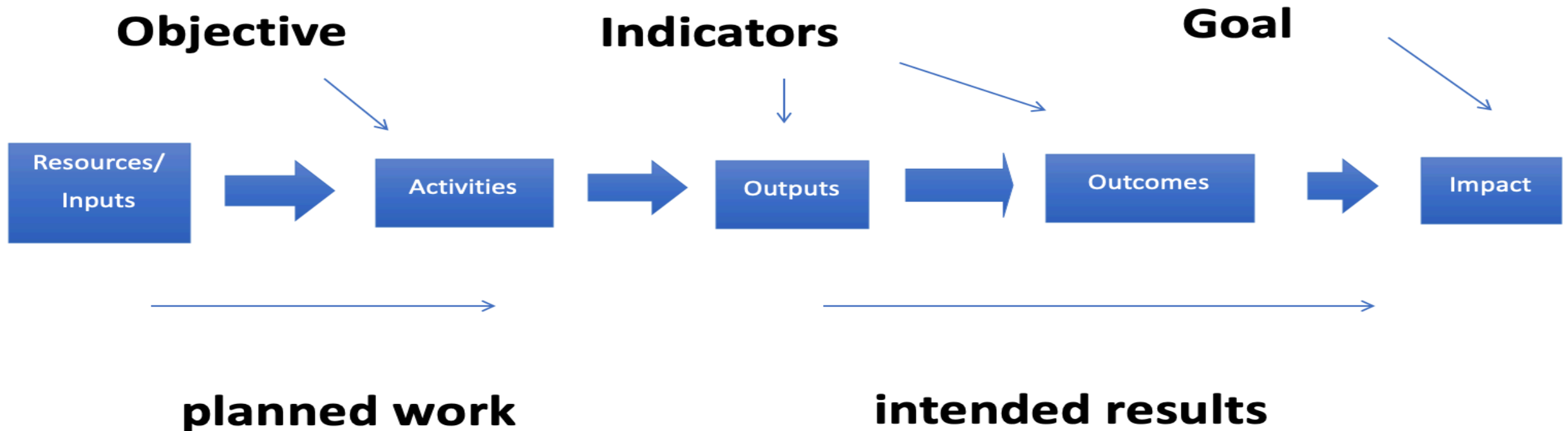
- Often used to supplement the workplan and identify additional activities designed to measure the results of the actions taken
- Usually includes collecting information (data) that can be used to measure changes (indicators) resulting from the activities

Expected results	Indicators	Baseline	Target	Data source	Data collection method	Frequency	Responsibility

Logic Models - *A framework for planning, management, and evaluation*

Basic components include: Resources, or inputs; Activities; Outputs or deliverables; Outcomes; Impacts; Indicators and measurement

Logic Frame



Example: Membership organization

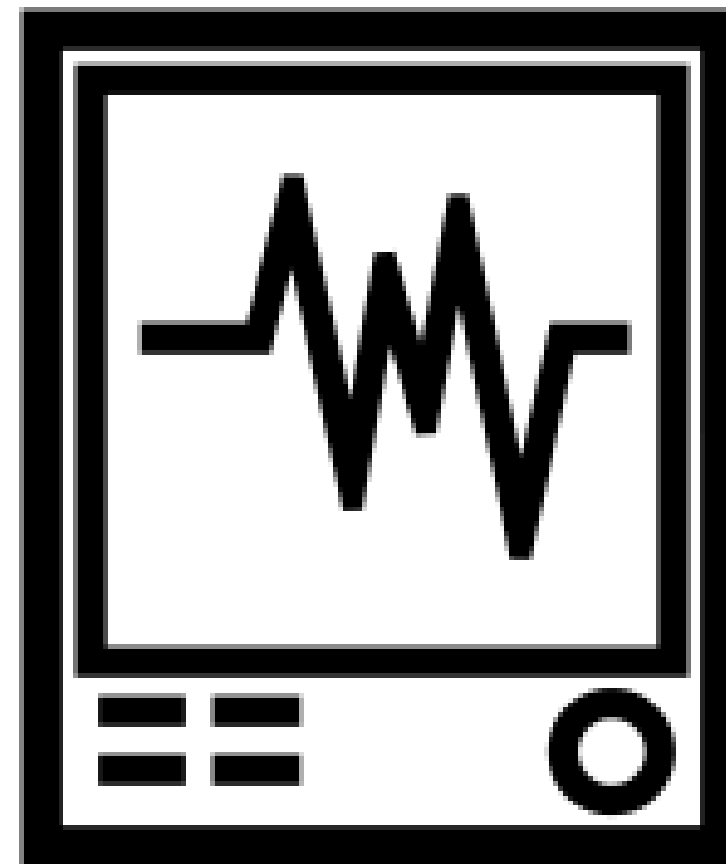
Goal: Knowledgeable and engaged members

Objective: Expanded and interactive website

Inputs/ Resources	Activities	Outputs/ Deliverables	Indicators	Outcomes	Impacts
-Budget: \$25,000 -Input of advisory committee	Website re- design	Updated website with information, resources, links, members' area and directory	Web analytics: -page views -click-throughs -responses -postings -downloads -uploads	-Website: fully functional and well-used	-Increased knowledge and engagement of members

Monitoring and Reporting

- ◆ Funder requirements
- ◆ Organization requirements and systems
- ◆ Recognition and acknowledgement
- ◆ Funder relationships
- ◆ Sustainability



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Monitoring and Evaluation

What's the Difference?

Monitoring is about accountability

- Keeping track of activities to ensure progress
- Tracking expenses
- Data gathered can support evaluation

Evaluation is about learning

- Helps build capacity
- Increase effectiveness
- Make program improvements



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Questions / Discussion



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Some Planning Resources

Centre for Theory of Change <http://www.theoryofchange.org/>

Grantcraft: Mapping Change- Using a Theory of Change to Guide Planning and Evaluation
<https://grantcraft.org/content/guides/mapping-change/>

[Wallace Foundation Program Based Budget Builder](#)

This tool includes worksheets and detailed instructions for an Excel-based template designed to help create program budgets. <http://www.wallacefoundation.org/knowledge-center/Resources-for-Financial-Management/Pages/Program-Based-Budget-Template.aspx>

W. K. Kellogg Foundation: Logic Model Development Guide

<https://www.wkkf.org/resource-directory/resources/2004/01/logic-model-development-guide>

W. K. Kellogg Foundation: The Step-by-Step Guide to Evaluation

<https://www.wkkf.org/resource-directory/resources/2017/11/the-step-by-step-guide-to-evaluation--how-to-become-savvy-evaluation-consumers>



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Results-Based Management for International Assistance Programming A How-to Guide Second Edition, 2016 https://www.international.gc.ca/world-monde/assets/pdfs/funding-financement/results_based_management-gestion_axee_resultats-guide-en.pdf

J.W. McConnell Foundation: A Developmental Evaluation Primer

<http://www.mcconnellfoundation.ca/assets/Media%20Library/Publications/A%20Developmental%20Evaluation%20Primer%20-%20EN.pdf>

J.W. McConnell Foundation: A Practitioner's Guide to Developmental Evaluation

<http://www.mcconnellfoundation.ca/assets/Media%20Library/Publications/DE%20201%20EN.pdf>

J.W. McConnell Foundation: Developmental Evaluation Companion

<https://mcconnellfoundation.ca/the-developmental-evaluation-companion-now-available/>

