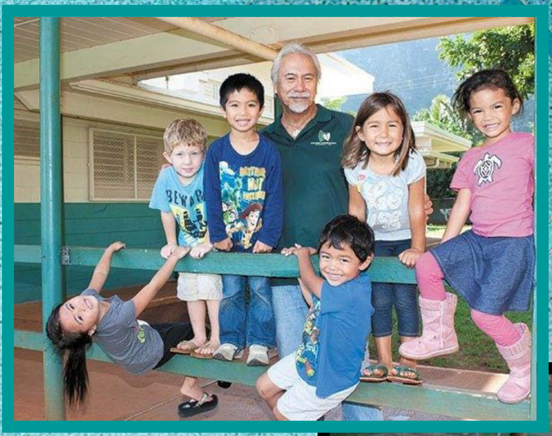
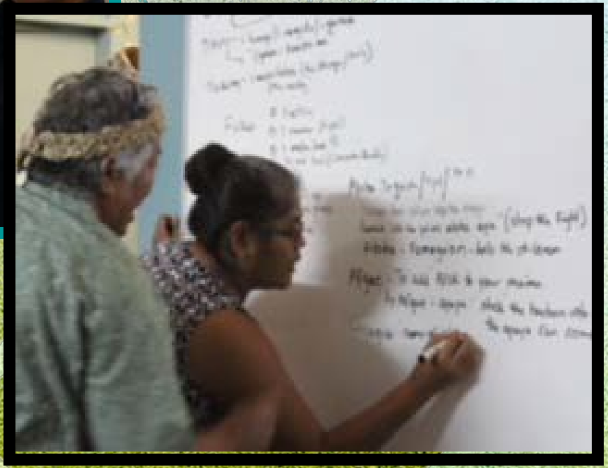


FINDING AND APPLYING FOR GRANTS



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I.

FINDING AND APPLYING FOR GRANTS

I. FINDING AND APPLYING FOR GRANTS

INTRODUCTION

Before a Resource Development Strategy can be developed it is important for a program to know exactly what their needs and their capabilities are for providing services. Once the program has identified what their long and short-term needs are they can then evaluate the capabilities of both staff and volunteers in developing needed resources.

When determining the needs of the program it is important to classify them into three areas:

- Money
- Services
- Goods

After determining the program needs in each of the three areas you will have to determine the sources of supply to pursue. Some of the various sources available:

- Government funding
- Voluntary sector
- Foundation funding
- Corporate funding
- Individual donors
- Fee for service

The program should not limit itself to one funding source. The more funding sources that the program has the less dependence it will have on any single sources.

IDENTIFYING PROGRAM NEEDS

To determine program needs examine two major areas: program services and program resources.

1. **Program Services** includes an analysis of the current activities of the program. It is important to examine.
    - The current services that you are providing
    - The need to expand the services
    - The need for new services
    - The resources that will be required to provide the services

2. **Program resources** is an analysis of the current staff and volunteers' capabilities as it relates to resource development and also what the need for additional staff would be if services were expanded. Included in this would be identifying the strengths of the staff, their contacts in the community and with potential funding sources. Also what contacts the Program has with potential funders and what tools the program has to strengthen those contacts. Finally the plan and resources available for resource development.

II. SOURCES OF FUNDING AND PROJECT DEVELOPMENT

The first step is to review your current sources of funding and what you would like to get in the future from the following:

- Government
- Foundations
- Corporations
- Individuals

This area also consists of an analysis of the program's experience and success with securing resources in each of the above areas.

IDENTIFYING POTENTIAL RESOURCE PROVIDERS

1. **Government Funding**

   The government provides funds for various types of services and programs through unconditional, categorical and block grants. These funds can be disbursed on a competitive, entitlement, or non- competitive basis. The Federal Government also donates or sells, at a minimum cost, various types of surplus property. Despite the cutbacks in Federal spending government is still the main source of support for most programs. The government application procedures are long and differ from agency to agency. It is important to research government agencies before applying for government funds.

2. **Foundations Funding**

   There are five different types of foundations: general purpose, community, special purpose, family and corporate foundations. Foundations gave 66.90 billion dollars in 2016. This represents 16% of all non government giving.

   Generally, foundations are interested in demonstration projects, cooperative efforts between organizations, seed money, research, resource centers, projects targeted for specific areas, and projects for which public funding is not available. Areas of interest will vary and currently foundation leaders find the largest challenges are related to healthcare, immigration, and the environment. In 2017 significant resources were committed to ensure equal access to social, economic, and educational resources.

3. **Corporate Funding**

   Most corporations do little giving. Thirty-five percent of the corporate contributions are made by 500 corporations. Corporations donate around 1% - 2% of their pretax profits, even though by law they can give up to 10%. Corporations gave 20.77 billion dollars in 2016. This represents 5% of all non government giving.

   Corporations are interested in giving grants that help in corporate goal attainment, provide benefits to employees, improve the environment for corporate operations, improve the political or social climate, increase citizen productivity, or improve the corporation's reputation.

   Corporate giving patterns reflect business cycles and profits, which vary by industry and company type. Corporations give primarily to health and social services, education, and community and economic development.

4. **Bequests**
   Bequest giving was 35.70 billion in 2016 and represents 9% of all non government giving.

5. **Individuals**
   The majority of non-governmental giving comes from individuals. Individuals represent 70 percent of total giving. Individuals gave 286.65 billion dollars in 2016.

POSITIONING THE PROGRAM TO SECURE RESOURCES

To maximize the program's capabilities to generate resources it is very important that the program has support from the Program and potential funders. This is accomplished through public recognition of a need and acceptance of the approach to be used to meet that need. It also requires that the program be able to respond to opportunities as they become available and that the program be able to create opportunities when necessary. This is done through the development of two components: resource providers, and staff/volunteers of the program.

1. **Resource Providers**. Resource providers include anyone who provides the program with money, supplies, political influence, and services. Money is supplied by the government, foundations, and/or corporations. Goods could be anything from food to equipment. They are given by the government, corporations, individuals, or other organizations. Political influence can be received for the program, certain individuals or association with various organizations. Services come from all outside individuals and organizations who are willing to provide time to the program.

2. **Staff/Volunteers.** Resource providers provide you with money, goods, and time which enables you to provide services. The staff and volunteers are the individuals who transform resources into services. The extent to which your program can secure resources will depend to a large extent on the capability of your staff and volunteers to provide services and the quality of those services. The extent to which they will be able to turn resources into services will depend on how you are organized, the kinds of knowledge and skills the staff/volunteers possess, and commitment to the program.

After you have identified your potential resource providers, staff, and volunteers, the challenge is to match them in such a way as to optimize the program's and grantsmanship potential. Certain funding sources will be more interested in the services provided by certain staff or the outcomes of the services.

Once you have analyzed the components and identified a match it is then time to develop a strategy for developing resources. In developing the strategy you must concentrate on the following:

- Products which are the program's services and the outcomes of those services.
- Price which is the cost of services and program operations. This not only includes the dollar cost but the social, psychological, and opportunity costs.
- Place is the location of the program and its services geographically and in time.
- Promotion is the activities which inform and educate the public of your program's services.

RESEARCHING THE FUNDING SOURCE

1. **Government Funding**
   Government agencies are mandated to support legislated programs and they need good applications and good providers. Government programs can be researched in the following

publications.

- ***Grants.gov***
  Grants.gov is a common website for federal agencies to post discretionary funding opportunities and for grantees to find and apply to them.

- ***Website:*** https://grants.gov

- ***Catalogue of Federal Domestic Assistance***.
  The Catalogue of Federal Domestic Assistance is available online and is searchable by the type of funding that you are looking for. The Catalog of Federal Domestic Assistance provides the following information.
  - Which federal agency sponsors which program
  - Legislation under which the program was established
  - Criteria for eligibility for applicants
  - Deadlines for application
  - Funding levels
  - Contact names & telephone numbers

- ***Website:*** https://beta.sam.gov

- ***State Catalogs*** - call the Governor office.

- ***Federal Business Opportunities***
  FedBizOpps is the web-based portal that allows suppliers of goods and sevices to review federal business opportunities. You can search for opportunities based on:
  - Keywords
  - Type of opportunity
  - Performance dates and place of performance
  - Website: www.fbo.gov

2. Foundation Funding

There are over 80,000 private foundations in the United States. Most foundations will support only pioneering or innovative projects. The types of foundations include general purpose, special purpose operating family and corporate.

The key to being successful in securing foundation funding is research. There are eight main areas to research to identify the appropriate foundation.

i. Financial Data. Identify the total assets of the foundation and the number of grants they issue each year. Also the size of the grants and period of funding. This will assist you in determining if the grants that are given by the foundation will support your project or if they will be one piece of the project and you will need to secure funding from multiple sources for the project.

ii. Geographic Location. The first area is to identify foundations that give grants in the geographic location where your organization is located. There are also foundations that give nationally and internationally.

iii. Areas of Interest. Once you have determined that the foundation does award grants in the geographic area where you are located the next area to examine is the foundation’s areas of interest. This will determine if your project falls within the interests of specific foundations.

iv. Types of Support. Many foundations will provide support in addition to grant funding such as equipment, technical assistance, or loaned staff. Analyze the resources needed for your project and there might be opportunities to replace portions of the cash needs with other forms of support. An example would be the project would need a van to transport participants and you might find a corporate foundation that provides vans to non profitorganizations.

v. Populations Served. Many of the foundations have specific populations i.e. youth, elderly, Native populations that they target as one of their areas of interest or it could be that the foundation was established to serve that population. It is important to know that and if a proposal is submitted to include information about that population which aligns with the foundation commitment to the population.

vi. History of Giving. Once you have determined that the foundation does provide grants in your geographic area and their areas of interest aligns with your project you would then want to look at their history of giving. Review organizations that have received grants or other types of support, types of organizations funded, and size of funding.

vii. Other Information. Note any other information that you have found relating to the foundation and your organization working with the foundation.

viii. People. Note the contact person and other staff working for the foundation. Also members of the Board of Directors. Share the information with other staff and members of your Board of Directors. If there is a connection it will help in establishing a relationship with the foundation and securing additional information about the foundation. It can also be used as a way to share information about yourorganization's mission and projects. Areas of interest among foundations change from year to year and if there current priorities do not align with your organization's projects perhaps in the future there will be a match. Also many foundations accept proposals by invitation only and it is a way to inform the foundation about your organization. Do not use connections with the foundation staff or board members as a way to circumvent the foundation's procedure for applying for a grant

ix. Application Information. It is important to adhere to the foundation's procedures for submitting an application. As previously stated many foundations accept proposals only from those organizations that have been invited to submit a proposal. Others request a letter of inquiry first and there are specific pieces of information to be included in the letter of inquiry. Still other foundations allow proposals to be submitted but in a specific format, with specific information, and the number of pages of the proposal might belimited.

The best advice on foundation funding is to do your research first. There are a number of resources to help you with this. One is the Foundation Center www.foundationcenter.org and they have over 140,000 grant makers in their data base. There is however a subscription fee to access their database. It does provide a number of filters that can be used to search potential funding sources. Grant Space www.grantspace.org also provides a number of resources to help you understand foundation funding and write proposals. They also offer free webinars and it is a free service of the Foundation Center. If the foundation has a website you will always go to the website to learn as much as you can about the foundation.

The template on the following page will assist you in conducting your research. Always maintain and periodically update your research because even if your current project does not fit within the areas of interest of a foundation a future project might be a good fit.

PROJECT DEVELOPMENT

Project development involves a series of steps that determine how to achieve a particular community/program goal or set of related goals. The planning and development process should occur well before you write your grant application and submit it for funding. In fact, the planning process should be concluded well before it's time to write the proposal.

Community-based planning is used to:

- identify specific community problems that stand in the way of meeting long-range community goals;
- understand the capacity of the community, your program, and any potential partners to implement a project;
- create measurable, beneficial outcomes and impacts to the community that result from the project's implementation; and
- determine the level of resources or funding necessary to implement the project.

Project planning helps us to:	Project planning helps us to eliminate:
Think ahead and prepare for the future	Poor project design
Clarify goals and long-term priorities	Overambitious projects
Identify issues that will need to be addressed to achieve those goals	Unsustainable projects
Choose between options for project design	Poorly defined problem statements
Assess a project's feasibility and whether it will lead to measurable, positive change	Unstructured project work plans
Evaluate project effectiveness and make the best use of resources	
Create a sustainable set of project results and benefits	Projects with little or no support from or benefit for the community

Table 2 The benefits of project planning

Community involvement is central to both the strategic planning and project planning that occurs before the development of a grant application.

The process of planning and managing projects follows a logical, continuous cycle. Each phase of the project leads to the next.

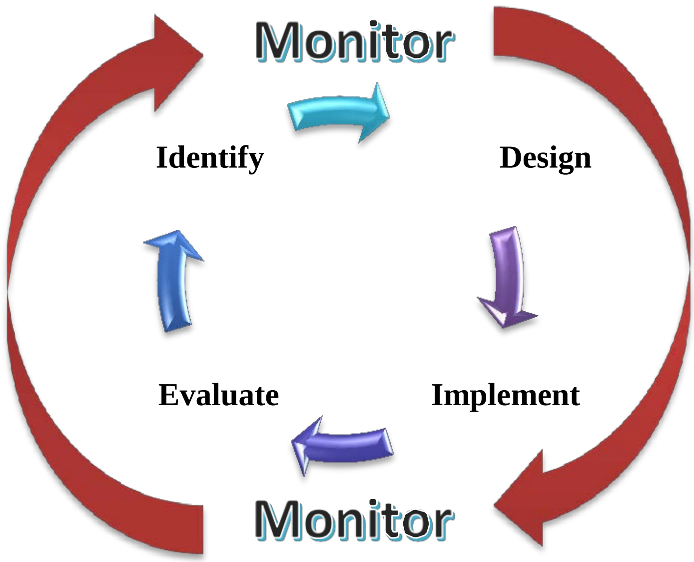

Figure 1 Planning Cycle

- The **identify** stage includes a community assessment process to determine the problems impacting the community and identify the community's assets.
- The **design** phase includes the actual planning and design of a project.
- The **implement** stage refers to the implementation of the project, whether it is a single-year or multi-year implementation period and how it will take place.
- The **evaluation** of the project's results occurs during and after a project to determine whether the project's goal and objectives were achieved. The evaluation process then leads to the identification of additional or persisting problems, and the cycle begins again.
- Project **monitoring** occurs throughout all stages of project operation. Monitoring results in formative project evaluation that keeps the project's planning, design, and implementation activities on track.

Initiating the Planning Process

Project planning often begins with the formation of a local project planning committee or group. Whenever possible, tribes and organizations should use a team approach, which involves staff, community members, and community or organizational leadership, to plan new projects. The committee members play an important role in keeping the project planning process on track while also ensuring that everyone has the opportunity to participate. The committee can organize meetings, conduct surveys, gather and analyze information, and meet with other agencies and organizations. This team will develop the project plan and use it to write the different parts of the application. Generally, you want to spend approximately 80% of your time planning your project and 20% of your time writing and packaging the grant application.
Perhaps one of the most daunting aspects of project planning is ensuring community involvement because it requires the knowledge and skills necessary to set up, conduct, and facilitate effective planning sessions. Public meetings should be held regularly throughout the planning process.

Properly facilitated meetings provide a great way to gather traditional, cultural, and local knowledge. They also serve as a means to receive input on potential project goals, objectives, and activities in order to determine ways to best prioritize them.
Sometimes the community engaged in project planning is a subset of the overall community. The community subset might be the community elders, health department, or any of the definable sub-populations found in your community.

Using the Community Process

An inclusive planning process will support community buy-in and help build unity around the project. To maximize results of the community planning process:

- **Keep records.** It is important to document your public process, as these documents provide a record of concerns, positions, and decisions that can be included in your application to document your community-based planning process. See **Appendix D** for sample forms.
- **Use what already exists.** A strategy for increasing the level of community participation in your planning activities is to think of groups that already exist and meet in the community, such as cultural, school and parent, artisan, elder and youth groups. Many communities have also organized public meetings that are part of their governance activities. Attending these pre-established meetings and informally collecting information from them can build community involvement in project design.
- **Choose wisely.** Meeting with people who are knowledgeable about the community,

such as elders and community leaders, is an effective way to collect valuable information. These people are functional leaders and can also help in connecting with and encouraging the involvement of others.

TOOLS	
i.	**Prospect Worksheet**
ii.	**Project Development Steps**

III. GETTING SUPPORT FOR YOUR PROGRAM

It is important to know the positions and interests of the Program. It is important to examine the following:

- What are the assets of the Program?
- What audiences are you now reaching?
- What new audiences do you want to reach?
- What are you telling people about your program?
- What is your image like?
- What actions are you seeking from the audiences you reach?
- What kind of feedback do you get?
- What action plans do you have for your public relations activities?

Always consult with the Program on their current public relations, so that you can build upon the Program's work.

The six steps to developing a Public Relations Plan include:

Step 1 - Auditing your current Public Relations. - Everything anyone might discover about your program should be noted here, including successes, disasters, needs, and future plans. You must know your current plan, your program's image, and the kinds of help you want

Step 2 - Public Relations Objectives - First you must examine your long range Public Relations goals, what you want to happen in the next 2-3 years. Then you will look at the short-range objectives for your Public Relations, which may be as simple as developing a brochure, or a power pint presentation.

Step 3 - Audiences - Examine what you know about the people you are already reaching, and those you wish to reach in the future. As you guess or discover their interests and affiliations, you will be able to determine how they will feel about your program and the Public Relations materials you have developed.

Step 4 - Messages - this is the best way to tell your audience what action you want them to take on your behalf. You must determine how your program will benefit the audience, and what words or symbols they will best respond to.

Step 5 - Media - From the multitude of choices, you must choose the media that your audience is most likely to be interested in reading or hearing or watching.

Step 6 - Action Plan and Budget - This summary document tells you how you will implement your Public Relations planning. You must develop a budget that includes cost-benefit analysis of various choices, as well as the staff time needed for your efforts. The feedback and response component of your action plan will show how effective your efforts have been, and what adjustments you must make in the future.

RESOURCES	TOOLS
i. Social Media Toolkit	i. Public Relations Assessment Questionnaire

IV. GRANT APPLICAITON

PREPARATION

A successful grant proposal is one that is well-prepared, thoughtfully planned, and concisely packaged. You must become familiar with all of the pertinent program criteria related to the funding source. This would include format, limitation on length, and specific forms required. Remember that the basic requirements, application forms, information and procedures vary with each funding source.

DEVELOPING IDEAS FOR THE PROPOSAL

When developing an idea for a proposal it is important to determine if the idea fits in to the short and long range plans of the Program and program. The project should tie in to the goals of the Program and program.

COMMUNITY SUPPORT

Community support for projects is essential. Look for individuals or groups representing academic, political, professional, and other organizations which may be willing to support the proposal in writing. The type and caliber of support is critical in the initial and subsequent review phases. Numerous letters of support can be persuasive to a grantor agency. Letters of endorsement detailing exact areas of project sanction and commitment are often requested as part of a proposal to a Federal agency. Several months may be required to develop letters of commitment since something of value (e.g., buildings, staff, services) is sometimes negotiated between the parties involved.

Many funding resources require, in writing, affiliation agreements (a mutual agreement to share services between agencies) and building space commitments prior to either grant approval or award. A useful method of generating support may be to hold meetings with program directors who would have a interest in the project. The forum for discussion may include a query into the merits of the proposal, development of a contract of support of the proposal, to generate data in support of the proposal, or development of a strategy to create proposal support.

IDENTIFICATION OF A FUNDING RESOURCE

A review of the objectives and uses and use restrictions of the funding resource can point out which funder might provide funding. Do not overlook the related programs as potential resources. Both the applicant and the funding source should have the same interests, intentions, and needs if a proposal is to be considered an acceptable candidate for funding.

Once a potential grantor agency is identified, call the contact telephone number and ask for a grant application kit. Get to know some of the grantor agency personnel. Ask for suggestions, criticisms, and advice about the proposed project. In many cases, the more agency personnel know about the proposal, the better the chance of support and of an eventual favorable decision. Sometimes it is useful to send the proposal summary to a specific agency official in a separate cover letter, and ask for review and comment at the earliest possible convenience. Always check with the agency to determine its preference if this approach is under consideration. If your project does not fit with the funding source ask them to suggest another department or agency which may be interested in the proposal. If possible, a personal visit to the agency's office or headquarters is also important. A visit not only establishes face-to-face contact, but also may bring out some essential details about the proposal or help secure literature and references from the agency's library.

GETTING ORGANIZED TO WRITE THE PROPOSAL

The first step is to insure that the organization supports the project for which you want to develop a proposal for funding. This can be done through development of a concept for review by the appropriate individuals within the organization. Located on the following pages is a standard preapproval form which can be adopted by the organization.

Once the organization has decided to proceed with the proposal the next step is to get organized. This can be accomplished through five simple steps.

Step 1 - Identify the individuals who will be responsible for the development of the proposal.

Step 2 - Identify the individual who will serve as the Proposal Development Supervisor.

Step 3 - Conduct a meeting to detail all the components of the proposal and the individuals responsible for each component. A sample agenda is located on the following page for the initial meeting of the proposal development team.

Step 4 - Assign timeframes for completion of each activity. A sample proposal development calendar is locate on page 16.

Step 5 - Schedule periodic meetings of the proposal development team.

Throughout the proposal writing stage keep a notebook handy to write down ideas. Periodically, try to connect ideas by reviewing the notebook. Never throw away written ideas during the grant writing stage. Maintain a file labeled Ideas or by some other convenient title and review the ideas from time to time. The file should be easily accessible.

COMPONENTS OF APROPOSAL

1. **Program Description**
2. **Introduction**
3. **Problem Statement**
4. **Goals and Objectives**
5. **Methods**
6. **Evaluation**
7. **Budget**

PROGRAM DESCRIPTION

The program description is a very important part of a proposal - not just something you jot down as an afterthought. There may be a box for a summary on the first page of a federal grant application form. In writing to a foundation, the program description may be presented as a cover letter, or the first paragraph of a letter-type proposal. The program summary is probably the first thing that a funding source will read. It should be clear, concise and specific. It should describe who you are, the scope of your project, and the projected cost.

The program description outlines the proposed project and should appear at the beginning of the proposal. It could be in the form of a cover letter or a separate page, but should definitely be brief no longer than two or three paragraphs. The program description would be most useful if it were prepared after the proposal has been developed in order to encompass all the key summary points necessary to communicate the objectives of the project. It is this document that becomes the cornerstone of your proposal, and the initial impression it gives will be critical to the success of your proposal. In many cases, the summary will be the first part of the proposal package seen by the funding source and very possibly could be the only part of the package that is carefully reviewed before the decision is made to consider the project any further.

The funding source must select a fundable project which can be supported in view of the need. The influence of the project both during and after the project period should be explained. The consequences of the project as a result of funding should be highlighted.

Some funding sources may screen proposals as a first step in grant-making. That is, they briefly examine each proposal to see if it is consistent with their priorities, if it is from an agency eligible to apply for their funds, etc. As a further step, the screeners may draw up a summary of their own and these proposal description may be all that is reviewed in the next step of the process. It is much better to spend the time to draw up a description of your own that the funding source can use than to hope that the reviewer sees the importance of your program in their brief initial look at your proposal.

INTRODUCTION

This is the section of a proposal where you tell about the Program. Many proposals tell little or nothing about the Program and speak only about the project. More often than not proposals are funded on the basis of the reputation or "connections" of the Program or its key personnel rather than on the basis of the program's content alone. The Introduction is the section in which you build your credibility.

CREDIBILITY

What gives the Program credibility for the funding source? It depends on the funding source. One funding source will be more responsive to persons of prominence on your staff, how long you have been in existence, how many other funding sources have been supporting you, and other similar characteristics of the Program. Another funding source might be more interested in the involvement of a "community person" rather than a prominent Program member.

Potential funding sources should be selected because of their possible interest in the Programs or your type of program. You can use the introduction to reinforce the connection you see between your interests and those of the funding source.

INCLUDE IN THE INTRODUCTION

- History of the Program
- Demographics of the Program
- Some of the most significant accomplishments
- Goals
- What support you have received from other organizations and prominent officials.

Start a "credibility file" which you can use as a basis for the introductory section of future proposals your write. In this file you can keep copies of:

- Newspaper articles about the Program
- Letters of support you receive from other Programs and other
- Include statement made by key figures in your field or in the political arena that endorsed your kind of program even if they do not mention your Program.

The credibility you establish in you introduction may be more important that the rest of your proposal.

PROBLEM STATEMENT

The problem statement (or needs assessment) is a key element of a proposal that makes a clear, concise, and well-supported statement of the problem to be addressed. The best way to collect information about the problem is to conduct and document both a formal and informal needs assessment for the program in the target area.

THE PROBLEM STATEMENT

- Describe the need(s) or problem that will be addressed
- Identifies the target population(s)
- Educates the reader regarding the issues
- Serves as a rational support
- Motivates the funder to help

The information provided should be both factual and directly related to the problem addressed by the proposal. Areas to document are:

- The purpose for developing the proposal
- The beneficiaries who are they and how will they benefit.
- The social and economic costs to be affected.
- The nature of the problem (provide as much hard evidence as possible).
- How the Program came to realize the problem exists, and what is currently being done about

the problem.

- The remaining alternative available when funding has been exhausted. Explain what will happen to the project and the impending implications.
- Most importantly, the specific manner through which problems might be solved. Review the resources needed, considering how they will be used and to what end.

Do not just assume the "everybody knows this is a problem..." That may be true, but it does not give a funding source any assurance about your capabilities if you fail to demonstrate your knowledge of the problem. You should use some keys statistics here from your community assessments you have been conducting on an annual basis. Do not fill your proposal with tables, charts, and graphs. If you use extensive statistics, save them for an appendix, but pull out the key figures for your problem statement. Know the statistics you are using.

- Make logical connection between the Program's background and the problems and needs with which you propose to work.
- Support the existence of the problem by evidence. Statistics, as mentioned about, are but one type of support. You may also get advice from groups in your community concerned about the problem, from prospective clients, and from other organizations and professionals in the field.

TIPS FOR WRITING THE PROBLEM STATEMENT

- Define the problem as a *problem*, not as the lack of a particular solution you have all ready formulated.
- Define clearly the problems with which you intend to work. Make sure that what you want to do is workable - that it can be done within a reasonable time, and with a reasonable amount of money.
- The need should be related to the Program's mission
- Express the need or problem in terms of the community in the area you serve (Not the program's need for help)
- Use objective data to support needs (e.g. statistical evidence, expert testimony, etc.)
- Describe how your project will meet the need without criticizing others
- Note if your project will be a model that can be used elsewhere
- Write in a clear, brief, compelling style that avoids jargon
- Use real life stories to illustrate need

GOALS AND OBJECTIVES

GOAL
A broad general statement of what the program hopes to accomplish; the long-range benefit.

OBJECTIVES
A measurable time-specific outcome that is expected to be achieved as part of the grant.

Objectives can be viewed as sub-goals and define the outcome of the project. Funding sources want to know what has been accomplished, and objectives spell out your intended accomplishments. They are clear, specific, measurable, time limited, and realistic and represent your commitment to the goals of the project.

OBJECTIVES DEFINE

- Who
- What
- When
- Where
- How

Funding sources that support your project want to see what you have done--what you have accomplished. The fact that you have established a service, or conducted some activities, does not tell them whether you have helped to solve the problem which you defined. They want to know what has been accomplished. They want to know the outcome of your activities.

If you are having difficulty in defining your objectives, try projecting your program in a year to two into the future. What differences would you hope to see between then and now? What changes would have occurred? These changed dimensions may be the objectives of your program.

TIPS FOR WRITING OBJECTIVES

- Relate objectives to the needs statement
- State in quantifiable terms
- State in terms of outcomes not methods
- Use words like to reduce, increase, decrease, expand, etc.
- Identify the group that will be served
- Specify realistic objectives that can be accomplished in the time frame
- Ensure that you have a way to measure the objective

METHODS

You have now told the funding source who you are, the problem(s) you want to work with, and your objectives (which will be a solution to or reduction of the problems), and now you are going to tell how you will bring about these results. Describe these methods and the activities you will conduct to accomplish your objectives.

The questions to be answered in this section include:

1. Why you have selected these methods?
2. Why do you think they will work?
3. Who is working on the problem?
4. What methods have been tried in the past and are being tried now and with what results?

Use this section to substantiate your choice of methods.

The consideration of alternatives is an important aspect of describing your methodology. Showing that you are familiar enough about your field to be aware of different models for solving the problems, and showing your reasons for selecting the model that you have, gives a funding source a feeling of security that you know what you are doing, and adds greatly to your credibility.

The program design refers to how the project is expected to work and solve the stated problem. The methods will detail:

- **INPUTS.** The activities to occur along with the related resources and staff needed to operate the project.

- **THROUGHPUTS.** Describes how the parts interrelate, where personnel will be needed, and what they are expected to do. Identify the kinds of facilities, transportation, and support services required.

- **OUTPUTS.** Explain what will be achieved through 1 and 2 above; i.e., plan for measurable results.

TIPS FOR WRITING THE METHODS

- **Link methods to the objectives**
- **Describe what will occur (how), when it will occur, and the rationale (why) the method was selected**
- **Use a timetable to illustrate when the activities will occur**
- **Note all steps that will be taken to reach each objective**

EVALUATION

The evaluation describes the process that will be used to determine the projects effectiveness or efficiency of the project.

THE EVALUATION SECTION

- describes the evaluation process
- identifies the indicators and data collection methods that will be used to measure success
- states who will do the evaluation
- describes how the evaluation data will be used

The evaluation component is two-fold: (1) product evaluation; and (2) process evaluation. Product evaluation addresses results that can be attributed to the project, as well as the extent to which the project has satisfied its desired objectives. Process evaluation addresses how the project was conducted, in terms of consistency with the stated plan of action and the effectiveness of the various activities within the plan.

Evaluation of your program can serve two purposes

1. Your program can be evaluated in order to determine how effective it is in reaching the objectives you have established in solving the problems you are dealing with. This concept of evaluation is geared towards the results of your program.

2. Evaluation can also be used as a tool to provide information necessary to make appropriate changes and adjustments in your program as it proceeds.

Measurable objectives are critical for an effective evaluation.

SUBJECT AND OBJECTIVE EVALUATIONS

There are two types of evaluation: subjective and objective

1. Subjective evaluations of programs are rarely evaluations at all. They tell you about how people feel about a program, but seldom deal with the concrete results of a program.

2. Objective evaluation is an evaluation conducted by an outside individual. An external evaluation will guarantee a more objective evaluation and add to the credibility of the total application.

It is essential to build the evaluation into your proposal and to be prepared to implement your evaluation at the same time that you start your program. To determine change along some dimension, then you have to show where your clients have come from. It is very difficult to start an evaluation at or near the conclusion of a program, as you might not know the characteristics of the people you are working with as they existed prior to being in your program.

TIPS FOR WRITING THE EVALUATION SECTION

- **Match the evaluation to the project**

- **Specify the purpose of the evaluation at the beginning of the section; what questions will the evaluation answer**

- **Build evaluation into the project**

- **Explain the indicators that will be used to determine the achievement of each objective and explain how data will be collected**

- **Include process and outcome components in the plan**

- **Try to involve beneficiaries in the evaluation**

BUDGET

The Budget is the dollar expression of the project being proposed. It is an estimate of the expenses that you anticipate.

Funding source requirements for budgets differ, with foundation requiring less extensive budgets than federal agencies. The following budget design will satisfy most funding sources that allow you to design your own budget and with minor changes that the sources will define, can be adapted to fit most requirements. The recommended budget contains two components - the first is Personnel and the second is Non-Personnel.

PERSONNEL

- ***Wages and Salaries***
  In this section you list all full and part-time staff in the proposed project, the number of hours they will work on the project, and the rate per hour.

- ***Fringe Benefits***
  In this section list all the fringe benefits your employees will be receiving, and the dollar cost of these benefits. Some fringe benefits are mandatory.

- ***Consultants & Contract Services***
  This is the third part of the Personnel section of the budget. In this section you include consultants and services you contract.

NON-PERSONNEL

- ***Space Costs***
  In this section list all of the facilities you will be using. Rent must be comparable to prevailing rents in the geographic area in which you are located. In addition to the actual rent, you should also include the cost of utilities, maintenance services and renovations, if they are absolutely essential to your program.

- ***Rental, Lease or Purchase of Equipment***
  List all of the equipment to be purchased, that will be used in the proposed program.

- ***Consumable Supplies***
  This means supplies such as paper clips, paper, pens, pencils, etc. If you have any unusual needs for supplies - perhaps you mare making a workroom available for community persons then put in a separate figure for that.

- ***Travel***
  Divide the section up into local and out-of-town travel. Do not put in any big lump-sum which will require interpretation or raise a question at the funding source.

- ***Telephone***
  Put in the number of instruments you will need times the expected monthly cost per

- instrument. Justify any extensive out-of-town calling that you will have to do.

- ***Other Costs***
  This cat-all category can include the following:
  1. Postage
  2. Fire, theft and liability insurance
  3. Dues in professional associations paid by the agency
  4. Subscriptions
  5. Publications, the cost of which may be broken up into:
     - printing
     - typesetting
     - addressing, if done by a service
     - mailing (separate and distinct from office postage above)
  6. Any other items that do not logically fit elsewhere.

INDIRECT COSTS

BUDGET JUSTIFICATION

PERSONNEL

- Identify, by title, each position to be supported under the proposed award.
- Briefly specify the duties of professionals to be compensated under this project.

FRINGE BENEFITS

- Are the fringe cost rates approved by the Federal Agency? If so, identify the agency and date of latest rate agreement or audit below, and include a copy of the rate agreement.
- If a above does not apply, indicate the basis for computation of rates, including the types of benefits to be provided, the rate (s) used, and the cost base for each rate. You must provide the information below or provide the calculations as an attachment.

TRAVEL

- Identify total Foreign and Domestic Travel as separate items.
- Indicate the purpose(s) of proposed travel.
- Specify the basis for computation of travel expanses (e.g., current airline ticket quotes, past trips of a similar nature, federal government or organization travel policy, etc.).

EQUIPMENT

- Provide the basis for the equipment cost estimates (e.g., vendor quotes, prior purchases of similar or like items,etc.).
- Briefly justify the need for items of equipment to be purchased.

MATERIALS AND SUPPLIES

- Provide the basis for the materials and supplies cost estimates (e.g., vendor quotes, prior purchases of similar or like items, etc.)
- Briefly justify the need for items of material to be purchased.

CONTRACTS AND SUBGRANTS

For proposed contractors/subgrantees provide the following:

- Competitively selected:
  - Contractor/Subgrantee
  - Work Description
  - Basis for the cost estimate

OTHER COSTS

- Provide the basis for the cost estimates (e.g., vendor quotes, prior purchases of similar or like items, etc.).
- Briefly justify the need for items of material to be purchased.

INDIRECT COSTS

- Are the indirect cost rates approved by a Federal Agency? If so, identify the agency and date of latest rate agreement or audit below, and include a copy of the rate agreement.
- If a above does not apply, indicate the basis for computation of rates, including the types of benefits to be provided, the rate(s) used, and the cost base for each rate. You may provide the information below or provide the calculations as an attachment.

PROPOSAL INTERNAL EVALUATION

Prior to finalizing a proposal it should be reviewed both internally and by someone not involved in writing the proposal. Attached is a form which can be used to evaluate the proposal.

You can use this form in three ways:

1. To review your own proposals, and record suggestions for improvements.
2. To get input from other tribal programs, to get on the proposal.
3. Through the mail to get outside individuals a grant proposal.

The Proposal Evaluation Form allows you to quickly critique a proposal, then give constructive positive suggestions for improvement.

TOOLS

i. Pre-Proposal Approval Form

ii. Proposal Team Meeting Sample Agenda

iii. Proposal Development Calendar

iv. Program Description

v. Introduction

vi. Problem Statement

vii. Objective Worksheet

viii. Methods

ix. Evaluation Plan

x. Budget Planning Worksheet

xi. Budget By Line Item and Budget Justification Spreadsheet

xii. Proposal Evaluation Form

V. AFTER THE GRANT IS SUBMITTED

PROPOSAL PRESENTATION

GRANTSMANSHIP IS MARKETING

- Think of your project as a product
- Think of the funding source as your customer
- Your task is to structure your product, and your "promotion" to fit the needs of your customer
- To succeed with grants, you must always tailor your appeal

POINTS THAT SCORE BIG WITH GRANT OFFICIALS

- Past accomplishments (personal and organizational)
- Demonstration of competence
- Concrete plans for action
- Thorough knowledge and understanding of your field
- Project results accurately predicted
- Demonstration of community support

When arrangements are being made, ask if any special information or preparation is needed. When preparing the presentation it is important to:

- Understand as fully as possible where funding source people are coming from (priorities, philosophy, problems, etc.)
- Develop a presentation that you are comfortable working with
- Use tools that you are comfortable with
    - Power Point
    - Video

Expect tough questions about your methods, credentials, budget and program impact.

Reread proposal. Have all your facts, analysis, conclusions, etc. firmly in mind.

Ask advice from inside sources, connections.

THE PRESENTATION SHOULD BE ORGANIZED AS FOLLOWS

- Start with history
- Stress the problem that you are working to solve
- Move to present situation
- Stress all important points, making use of appropriate materials
- Underscore need for money. Tell what action is waiting for financial support
- Ask if any points from proposal need clarification

DURING THE PRESENTATION

- Answer questions concisely
- Balance enthusiasm for your project and principles with awareness of interviewer's
- Do not exaggerate, belabor small points, or hide weaknesses. Try to show complete understanding of the situation

- Mention names of all supporting groups and individuals

PROJECT REPORTING

Each funder wants to know the progress and results of a program. Some funding sources have specific forms and formats for reporting while others leave it up to the Tribe.

Detailed below is a guideline for preparing reports.

1. **Restate yourobjective.**
   Re-write you complete objective (the objective statement).

2. **Describe your progress toward achieving your objectives during this reporting period.** Refer to your evaluation plan to describe your activity, beneficiaries, and the number of people served this reporting period and to date. What did you do relating to this objective this period? Who did you serve or impact? How many did you serve or impact this period? Describe your desired result and indicators used to measure the desired result

3. **Note evaluation activities in which you have engaged.**
   Refer to your evaluation plant to describe how you measured your desired result. Describe the type of instruments you used (e.g., surveys, test, observation, etc.). Describe the information from every instrument that you used. (Do not forget to report the data from baseline data collected during early reporting periods.) Describe who administered and completed each instrument. Describe to whom, as well as how, each instrument was administered. Describe which, and how many individuals, completed each instrument.

4. **Describe relevant evaluation data.**
   Describe the results of you analysis of your evaluation data. This should be related to the standard you see in your objective. What quantitative statistics did you find? What qualitative information did you find? What stories do you have that relate to your quantitative or qualitative data? Compare the results to your evaluation with the standard set in your objective. Did you meeting the standard you stated in your objective? What is the importance of this statistical or qualitative information? How does this service address an existing need? (Relate to baseline data.) What does this imply about your success?

   - State ideas for improvement in our program, or any next step.
   - What do your results mean in terms of what you will do next?
   - What improvements do your plan?
   - Will you expand thisservice?

REPORTING WORKSHEET

Using the outline provided, please complete the following information about progress towards your objectives during this reporting period.

RESTATE YOUR OBJECTIVE

- Describe your progress toward achieving this objective during this reporting period.
- Describe your activity, beneficiaries, and the number of people served this quarter and year to date.
- Describe your desired result and indicators used to measure the desired result.

NOTE EVALUATION ACTIVITIES IN WHICH YOU HAVE ENGAGED

- Describe how you measured your desired result.
- Describe who administered and completed the instruments.

DESCRIBE RELEVANT EVALUATION DATA

- Describe the results of your analysis of your evaluation data. (This should be related to the standard you set in your objectives.)

    1. Results (include statistics and qualitative information).

    2. Stories which illustrate your statistics or qualitative information.

- Compare the results of your evaluation with the standard set in your objective.

    1. State ideas for improvement in your program, or any next steps.

TOOLS	
i.	**Follow Up Activity Worksheet**
ii.	**Follow Up Tasks Worksheet**
iii.	**Reporting On The Grant**

II.

SOURCES OF FUNDING AND PROJECT DEVELOPMENT

TOOL 1: PROSPECT WORKSHEET

Focus on Funders Whose Priorities Closely Match Your Project

DATE:	FUNDER:	YOUR ORGANIATION:

1. NAME:____
   ADDRESS:______________________________________
   CONTACT PERSON:_________________________________

2. FINANCIAL DATA
   Total Assets __________________
   Total Grants Paid __________________
   Grant Ranges/Amount Needed __________________
   Period of Funding/Project __________________

3. Subject Focus
   (List order of importance)
   a.) ____
   b.) ____
   c.) ____

4. Geographic Limits:
5. Type(s) of Support:
6. Population(s) Served:
7. Type(s) of Recipients:
8. People: (Officers, Donors, Trustees, Staff)

9. Application Information:

Does the funder have printed guidelines/application forms?
Initial approach (letter of inquiry, formal proposal)
Deadline(s):
Board Meeting Date(s);

Sources of Above Information

☐ 990-PF (Year:)	☐ Directories and grantindexes
☐ Annual Report (Year:)	☐ Grantmaker Web site
☐ Requested	☐ Received

Notes:

Follow-up:

TOOL 2: PROJECT DEVELOPMENT WORKSHEET

STEP 1

PROJECT DEVELOPMENT

Identify a Community Long-Term Goal

Activity 1.1: Community Goals & Project Ideas

The community's vision is the foundation for all projects. This exercise will help you identify your community's long-term goals as you brainstorm and narrow down your basic project idea.

1. Describe your community's long-term goals:

____
____
____
____

2. Where are these goals documented? (e.g. community strategic plan, County document, etc.)

____
____
____
____

3. Who were the people in the community that developed these goals?:
   1.____
   2.____
   3.____
   4.____

4. Prioritize and list the project ideas your organization would like to implement based on community input, in the next two to three years?
   1.____
   2.____
   3.____
   4.____

5. How does each of these project ideas align with reaching your communities long-term goals?
   1.☐____________________________________☐______________________________
   2.____
   3.☐____________________________________☐______________________________
   4.____

6. How does each project idea address a need in your community?
   1.____
   2.____
   3.____
   4.____

7. What members and/or representatives of your community (e.g. elders, colleges, state offices, related nonprofits, governing board) support each project idea?
   1.____
   2.____
   3.____
   4.____

8. does your organization currently have the capacity to undertake each project? If new staff is necessary, can the organization manage the new additions?

Project Idea	Current Capacity to Implement Project?	Capacity for New Staff?
1.		
2.		
3.		
4.		

9. Is there anyone else in and around the community implementing or planning similar projects? Can partnerships or collaboration be formed to benefit all involved?

Project Idea	Organization with Similar Project	Possible Partner
1.		
2.		
3.		
4.		

10. What members and/or representatives of your community (e.g. elders, colleges, state offices, related nonprofits, governing board) support each project idea?
    1.____
    2.____
    3.____
    4.____

11. Does your organization currently have the capacity to undertake each project? If new staff is necessary, can the organization manage the new additions?

Project Idea	Current Capacity to Implement Project?	Capacity for New Staff?
1.		
2.		
3.		
4.		

12. Is there anyone else in and around the community implementing or planning similar projects? Can partnerships or collaboration be formed to benefit all involved?

Project Idea	Organization with Similar Project	Possible Partner
1.		
2.		
3.		
4.		

STEP 2

PROJECT DEVELOPMENT

Conduct a Community Needs Assessment to Identify the Problem

Activity 2.1: Community Problems Self-Assessment

This exercise will help you clearly define the community need(s) your project will address. When completing this activity for your own project, the information should be based on a previously conducted needs assessment in your community. Answer the questions in the space provided in the table below:

Community to be Served	Need for Assistance	Supporting Information & Data	Impact if Problem is Resolved
Who is in need? *(Ex: Elders, Farmers, the Youth)*	**What is the need?** *(Ex: Adult day care, sell produce, reduce high risk behavior)*	**What evidence do you have to justify the nature and extent of the need?**	**What will change in the community after the need is met?** *(Ex: Elders will remain independent, increased sustainability, higher graduation rates)*
Where? *(Geographic location)*	**Why does this need occur or exist?** *(What barriers stand in the way of meeting the need?)*		**How is the need linked to your organization?** *(Why is your organization best positioned to serve this need?)*

Activity 2.2: Conditions/Needs List

Choose one **Community Long-Range Goal** from STEP 1 that aligns with your project idea and write it here:

List five **conditions/needs** identified by the community that are currently preventing the community from achieving the long-term goal above:

Examples:

a. Fifty-five percent of the youth in our community are dependent on an illegal substance.

b. Farmers in our community struggle to sustain themselves and are at risk ofgoing out of business and losing their familyincomes.

c. Thirty percent of the elders require support to remain in their homes and independent.

1.

2.

3.

4.

5.

STEP 3

PROJECT DEVELOPMENT

Assess Available Resources

Activity 3.1: Community Resource Identification

Your organization may already have access to some of the resources your project might need. Map out your available resources in the table below. List each under one of four categories:

- **Human**: A person or group of people who can provide goods, knowledge or skills for your project
- **Programs**: Existing classes, workshops, mentorships, or organizational sponsored programs that provide activities needed to reach project objectives.
- **Facility/Equipment:** - Space or equipment (an item costing more than $5000 per unit) that can be used for project activities and implementation.
- **Other**: Cash, grants, discounts and supplies needed for project implementation.

List available resources on the following two pages. The next page asks you to list resources available **within** your organization, village or community. The last page asks you to list resources available **outside** of your organization, or village, such as those provided by partners or volunteers.

Some examples of asset mapping are provided below:

Resource	Benefit to Potential Project
Human	
Within: Uncle Kimo, Local Farmer	Knows cultural farming methods, elder
Within: FFA Student Volunteers	Club at town school. 50 members, labor.
Outside: Aquaponics Expert	Only subject matter expert on island, partner
Outside: National Farming Society	Provides free organic composting expertise
Programs	
Within: Farmers Market Association	Possible sales, revenue for participants
Within: Community Seed Sharing Project	Access to heirloom native seedlings
Outside: Comm. College Value-Add Program	Certified processing plant access, business plans
Outside: Dept. of Agriculture	Support funding
Facility/Equipment	
Within: Local community kitchen	Certified facilities, food prep
Within: Tractor	Village vehicle for tilling
Outside: Local school / church	Space for team / community meetings
Outside: Hawaii Hydrology Association	Used, discounted water filtration system parts
Other	
Within: Manure	Available free from chicken farm on property
Within Estate of John Kekala III	Promised $10,000 donation from Board Member
Outside: Hawaii Farmer's Association	Free access to farm tools for volunteers
Outside: Sam's Gardening Supply	Exclusive 30% off rate for project supplies

1. List resources available **within** the community.

Resource	Benefit to Potential Project	Cost ($)
Human		
Programs		
Facility/Equipment		
Other		

2. List resources available **outside** the community.

Resource	Benefit to Potential Project	Cost ($)
Human		
Programs		
Facility/Equipment		
Other		

STEP 4

PROJECT DEVELOPMENT

Determine the Project Goal

Activity 4.1: Goal Questionnaire

Answer the following questions to define your project goal:

1. Write your project idea here:

2. Describe the intended target population to be served through your project here:

3. Write the long-term community goal identified in STEP 2, Activity 2.2 here:

4. Choose one condition/need listed in STEP 2, Activity 2.2 and write it here:

5. Using the above condition/need, write a project goal statement that reduces or eliminates the condition/need written above:

STEP 5

PROJECT DEVELOPMENT

Select a Project Strategy

Activity 5.1: Choose a Strategy for Achieving Your Goal

Write your project goal statement here from STEP 4:

1. Identify three approaches that could achieve the goal identified above:
   1.
   2.
   3.
2. Describe the community support and ownership for each of the alternate approaches:
   1.
   2.
   3.
3. Select the approach from question 2 that you like best. In the space below, list all the steps that you think you'll need to complete in order to use this approach (continue on a separate page if needed):
   -
   -
   -
   -
   -
   -
   -
   -

STEP 6

PROJECT DEVELOPMENT

Develop Project Objectives and Activities

Write your **Project Goal** from STEP 4 (bottom of the page) here:

Activity 6.1: Establish Project Objectives and Activities

1. Draft some project objectives for your project (bear in mind, for an AOA project you are limited to a maximum of three objectives):
   1. ____
   2. ____
   3. ____

2. Answer the following questions for each objective:

	Yes	No
Does the objective present a **TIME-LINE** in which the objective is to be completed**?**		
Does the objective describe a bench-mark **TARGET** for measuring the amount of change related to the community change or indicator?		
Does the objective include an **INDICATOR** that reflects a positive change in the identified community condition/need**?**		
Does the objective describe the **POPULATION** that will participate in activities related to the objective**?**		

3. If you answered "no" in any part of question 2, revise your objective accordingly.

Activity 6.2: Develop an Outcome for Each Objective

4. Develop an outcome for each objective. The outcome should reflect a positive change that will occur in the community as a result of completing theobjective.

Objective	Outcome

Activity 6.3: Developing Milestone Activities & Filling Out the Objective Work Plan

5. Insert your community condition, project goal, objectives and outcome into the Objective Work Plan (OWP) form.

6. Develop milestone activities to accompany your objectives. Sequence your activities in the order in which they will beinitiated.

7. Assign a timeframe to each activity. Be sure to allow enough time for each. It is better to overestimate than underestimate!

8. Develop outputs for each milestone activity. Outputs are direct results that come from completing a milestone activity, (e.g., if the activity is to implement 3 cultural workshops in basket weaving, stone carving and woodwork, then the output could be to increase cultural knowledge and connection through traditional arts andcraft).

9. Estimate the number of non-salary personnel hours (hourly rate) for appropriate activities. For an explanation of non-salary personnel, refer to the definition in the glossary of your manual.

10. Insert the milestone activities, outputs, lead and others responsible for each activity, and timeframes in the appropriate columns in your OWP.

Objective Work Plan (OWP)

Project Title:
Project Goal:
Project Year:

Objective # _:				
Outcome				
Milestone Activities	**Outputs**	**Project Staff**	**Start Date**	**End Date**
1		Lead: Other:		
2				
3				
4				

The Paperwork Reduction Act of 1995: Public reporting burden for this collection of information is estimated to average 3 hours per response, including the time for reviewing instructions, gathering and maintaining the data needed, and reviewing the collection of information. An agency may not conduct or sponsor, and a person is not required to respond to, a collection of information unless it displays a currently valid OMB number.

STEP 7

PROJECT DEVELOPMENT

Identify Potential Challenges and Develop Contingency Plans

Activity 7.1: Assumptions

Listed below are the top four types of contingencies that should be addressed in any project plan:

iv. ***Key staff identified in plan can no longer commit once grant funding is awarded***
v. **Staff turnover through the course of the project**
vi. **Key partnerships fallthrough**
vii. **Expected non-Federal cash match contributions are no longer available**

Based on your project idea, list three assumptions or critical issues you can think of that could result in project delay or in not achieving planned results and how you would overcome them.

1. Contingency Situation: ______________________________

____

____

What Would You Do? ______________________________

____

____

2. Contingency Situation: ______________________________

____

____

What Would You Do? ______________________________

____

____

3. Contingency Situation: ______________________________

____

____

What Would You Do? ______________________________

____

____

STEP 8

PROJECT DEVELOPMENT

Develop a Sustainability Plan

Activity 8.1: Gathering Ideas

1. Brainstorm a list of possible efforts for continuing the project and/or its **outcomes** after its completion. Some examples could include maintaining staff, cross training, or fee for service.

2. ~~Place your ideas from Question 1 in the appropriate column of the table below:~~

Programmatic Sustainability (Sustaining the project)	**Financial Sustainability**

Activity 8.2: Develop a General Sustainability Strategy

Using the ideas you developed on the previous page, discuss the following questions with your project development group and complete the table below:[1]

List Expected Project Outcomes Here (see STEP 6, Activity 6.3 - OWP)	What Strategy Will Be Used to Sustain these Outcomes ?	Describe How the Community Accepted/Agreed to Using This Strategy

[1] Mim Carlson, Winning Grants Step by Step (San Francisco, CA: Jossey-Bass) 50.

STEP 9

PROJECT DEVELOPMENT

Prepare the Budget and Budget Justification

Instructions:

In order to prepare a line-item budget, you will need to pull out the OWP that you created in Activity 6.3 and the list of Available Resources that you developed in Activity 3.1.

1. Take the first activity listed on the OWP. (For the purposes of this worksheet, let's examine just activities that take place in Year 1 of the project) ***Example:*** *Activity - Recruit 20 participants for a 6-month farming program*
2. Identify everything you'll need to purchase or pay for to implement that activity. ***Example:*** *Staff to do the recruiting, a place for recruits to sign up, and supplies for flyers and sign-up booth.*
3. List each cost item under its appropriate category on your line-item budget. Write the total cost for each item in column d.
4. Look at your Available Resource list and identify which activity costs can be covered under your available resources. If a line item can be covered by your existing assets, list the cost under column b. ***Example:*** *The Farmers Market Association is donating free booth space, and your small Dept. of Ag. Grant covers supplies.*
5. If the cost item is not covered by assets you've identified as already available, then list the cost under column c. (Note: You may want to split the cost for an item between both columns). ***Example:*** *Staff to do the recruiting is not covered under your available resources, so you would include costs for one staff member under the Personnel category.*
6. Repeating steps 1-5 for each listed activity in the OWP will produce a line-item budget that includes all costs needed to carry out your project plan.
7. Add all the category subtotals in column d to get a **total project cost.** This is the amount that your entire project will cost. The total of all subtotals in column c will show you the funding you still need to obtain — from a grant, partner or elsewhere — in order to implement the project.
8. [Activity 9.2] Write a budget justification for each of your line-items by stating why each line item is needed to complete each of the listed project activities.

A Note on AOA Funding and Applicant Match
Some funders require that the grant applicant organization share in the project cost. This is often referred to as "the applicant match." Formula: o **Federal Request = 80% of total project costs.** o **Applicant Match ("Non-Federal Share") = 20% of total project costs.** For AOA grants, the required matching contribution is 20% of the total project cost. This applicant match can be made of cash and/or in-kind donations and labor — resources listed in Activity 3.1, Available Resources. For more information on AOA grants, call the Pacific TTA Center.

Activity 9.1 Identify the Financial Needs

BUDGET BY LINE ITEM
YEAR ONE

	(b) EST. VALUE OF CURRENT ASSETS	(c) EST. VALUE OF RESOURCES NEEDED	(d) EST. TOTAL
PERSONNEL			
Project Manager			
Staff			
Staff			
TOTAL PERSONNEL	$	$	$
FRINGE BENEFITS			
FICA			
Unemployment			
Workers Comp			
Health and Life Insurance			
TOTAL FRINGE BENEFITS	$	$	$
TRAVEL			
Airfare			
Ground Transportation			
Lodging			
M&IE			
TOTAL TRAVEL	$	$	$
EQUIPMENT			
Items $5000 or more/unit			
Electronic/Technology			
Vehicle/Heavy Equip.			
TOTAL EQUIPMENT	$	$	$
SUPPLIES			
Meeting Supplies			
Office Supplies			
Other Consumable Supplies			
TOTAL SUPPLIES	$	$	$

(continued)	(b) EST. VALUE OF CURRENT ASSETS	(c) EST. VALUE OF RESOURCES NEEDED	(d) EST. TOTAL
CONTRACTUAL			
Professional Services			
Lease of Property			
Web Designer			
TOTAL CONTRACTUAL	$	$	$
OTHER DIRECT COSTS			
Accounting Services			
Fees			
Local Mileage			
Facility Rentals			
Office Rental			
Postage			
Professional Services			
Telephone			
Xerox/Printing			
Consultants			
TOTAL OTHER DIRECT COSTS	**$**	**$**	**$**
TOTAL DIRECT COSTS	**$**	**$**	**$**
TOTAL INDIRECT COSTS	**$**	**$**	**$**
TOTAL PROJECT COST	**$**	**$**	**$**

Activity 9.2 Budget Justification

Based on the budget you developed in **Activity 9.1**, write a draft budget justification for your project:

Personnel: ____________________

Fringe Benefits: ____________________

Travel: ____________________

Equipment: ____________________

Supplies: ____________________

Contractual: ____________________

Other (List): ____________________

Indirect Costs (List): ____________________

Non-Federal Share: ____________________

STEP 10

PROJECT DEVELOPMENT

Write the Project Summary / Abstract

Activity 10.1: Create an Abstract

1. Write two sentences about your community and the population to be served by the project:

2. Write two or three sentences about the need for the project, identifying the condition in the community that the project addresses:

3. Write the project goal:

4. Write the project objectives:

5. Write the project outcomes:

6. Define the number of people to be served by the project:

III.
GETTING SUPPORT FOR YOUR PROGRAM

ANA Outreach & Social Media Toolkit

A Guide to Creating a Successful Social Media Plan for Your Community Organization or Tribe

ADMINISTRATION FOR NATIVE AMERICANS

ka'ānani'au

Operators of the ANA Pacific Region Training and Technical Assistance Center

INTRODUCTION

LET'S START SOCIALIZING

If you're trying to create a social media plan for your Native tribe or nonprofit organization, you've come to the right place. Learn to build online relationships with your communities in this step-by-step guide.

Social media can enable a tribe or nonprofit to connect with the communities they serve to promote projects, recruit volunteers, partner with like-minded organizations, find funding and more. But simply having a Facebook page floating out on the web is not enough. True social media success requires a clear vision and a willingness to commit the time and resources it takes to maintain that ongoing virtual dialogue.

It is to support this development of Native communities that the U.S. Administration for Native Americans has created this ANA Nonprofit Social Media Toolkit. This step-by-step guide will lead you through the process of creating an organized, realistic, and strategic social media plan for your organization. **These guided activities are designed for the social media novice, to be done with two or more people from your organization**, led by a designated social media administrator and with support from a top-level decision maker (executive director, tribal chief, manager).

The guide is broken into 5 key sections:

SECTION 1: Define Your Purpose

SECTION 2: Get to Know Your Communities

SECTION 3: Map the Social Media Landscape

SECTION 4: Craft Your Posting Strategy

SECTION 5: Track, Analyze and Improve

As you go through this guide, try not to worry too much about the specifics of any one social media tool or website. Why? Because technology constantly changes. Becoming too deeply focused on one specific tool will keep you from seeing the bigger picture — connecting with your communities online where they organically spend time and interact with others.

This is going to be fun. Let's get started.

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Section 1: Define Your Purpose

Why are you doing this in the first place?

Sure, social media can empower your organization to reach your communities in new and meaningful ways, but simply creating a social media account is certainly not your end goal. Social media is just a medium for you to use to spread messages and to engage in conversations that can help — or hurt — your mission.

Why does your organization exist?

Understanding what your organization does is essential to creating a consistent voice and brand perception in the minds of your social media followers. Start by examining your own organization's mission. If your organization is a non-profit, then you probably have an explicitly stated charitable purpose registered with the IRS. However, your official mission statement might be long and lofty, not something that rolls off the tongue.

Imagine that a relative you haven't seen in years visits from out of state and asks about what your organization does. Would you answer with the full mission statement verbatim? Or would you use slightly looser language?

Twitter only gives you 120 characters to describe yourself. What if you only had one word to describe your organization or tribe? Apple Inc. might say "innovation." Disney's might be "magic." This one word will help to inform the "flavor" of your posts. The different ways of describing your organization define an editorial voice that represents the "personality" of your organization. WORKSHEET 1A

WORKSHEET 1A:
Describe your Organization
With your partner, you'll examine your organization's purpose and how to communicate that purpose by asking each other a guided set of questions. As a result, you'll generate a 250-character organizational description that you can use in all of your social media.

All revved up with nowhere to go?

Before you start speeding down the Internet social superhighway, take a moment to chart your course. Why do you need a social media strategy? If your answer is "because someone told me I need one," then take a moment to think about it.

Effective social media requires putting in hours each week coordinating your campaigns and making daily updates to your various social media accounts. It often involves coordination between multiple staffers. Without clear social media goals, your organization can quickly run out of gas without much progress to show for all the effort.

Before you start filling in your social media profiles, **take a moment to create clear, measurable, meaningful goals** for your social media campaign. While it's

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WORKSHEET 1B:
Define your Social Media Goals

Write out your three social media goals in this worksheet. Designate each as an "Awareness," "Sales," "Loyalty" or "Other" goal, and make sure your goal includes a method of measure and a time frame.

important to be able to somewhat correlate organizational increases with social media activities, the point here is to create goals that will remind you why you're doing this in the first place. Understanding these goals will ultimately help you choose the platforms best matched to the types of relationships you plan to build through social media.

Resist your urge to let your various social media platforms dictate what your goals should be. If, a year from now, you've finally achieved a platform-dictated goal like "Accumulate 100 followers on Twitter," should you really celebrate? Well, if your goal all along should really have been "to establish brand awareness with 60 service-eligible, at-risk teens," you might be disappointed to learn that 95 of those new Twitter followers were service providers, funders and current employees.

Your goals will likely fall into one of three categories:

1. **Awareness:** People need to know you exist. If they know the name of your organization and the basics of what you do, then consider them aware. Any type of post coming from your account will raise brand awareness and create associations in the minds of your social media followers. Whether or not those associations are positive is up to your posting strategy. (ex: "To establish brand awareness with 75 new, eligible tribal women by the end of Year 1.")

2. **Sales:** Increasing your bottom line is probably the most important metric you can hope to raise through social media campaigns, but it's also the most difficult to directly affect. You'll need to pitch your services, events and products even if they're free, but too much selling will cause social media followers to tune you out like they do website banner ads. How will you know that increases came from social media? If you want to get more people to show up at your next annual convention (ex: "To increase the number of paid attendants at this year's Convention by 15%"), then you might have them register on an online form shared only via social media, or give out a bonus gift if they provide a social media-exclusive code.

3. **Loyalty:** Reward existing followers and keep the spark alive. By keeping your existing communities in the loop, quickly and regularly replying to their comments, and offering incentives for repeat business, you can make your existing rosters of supporters more active. (ex: "To increase the average number of volunteer days per volunteer by 25%")

If your goals don't fit into one of these categories, feel free to create your own. Just remember to create some type of measurable benchmark by which you can measure your progress towards success. Track metrics that will contribute to the

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overall success of your organization, not just the perceived success of your social media accounts.

Maybe you've already designed some tribe- or organization-wide goals in a strategic plan — craft your social media goals to align with those. Choose measures that make sense for your organization at the stage you're in now. Update and change your goals each year as needed, but make sure to assess the progress you've made before ditching your benchmarks completely.

Now that you know yourself...

Get to know your community! You've gotten to know your own organization more intimately, and you've thought about how you might communicate that identity to others, but which method of communication will work best for the communities you want to reach?

In Section 2, you'll learn to target specific communities and begin to connect your message with your audiences in ways that will position you to most effectively accomplish your newly-defined social media goals.

So what are you waiting for? Onto the next section!

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WORKSHEET 2A:
Segmenting and Targeting
Break your communities into workable, targetable groups. Start by segmenting your groups using demographic indicators meaningful to your organization. Then consider how you can most effectively target each segment.

community segment. One category you may want to start with is "Familiarity with the Organization," in which you could rate segments on a scale like this:

- No Familiarity
- Aware But Has Never Participated (in your services or project(s))
- Participated Once
- Repeat Participant
- Dedicated Advocate

For each social media campaign you launch, you'll want to make sure you're targeting adjacent groups on the Familiarity scale. Why? Because it's just too confusing to direct messaging at both absolute newcomers and long-term advocates in the same campaign. The "Familiarity" category is the best place to start segmenting your communities.

For example, perhaps your community-farming project team would like to reach Native community members living in your tribal area. While you've already defined one category, you might consider other categories that could define segments that exist within that geographic area. Perhaps you might consider *gender, age, employment status,* and *experience with farming* as other primary categories. After brainstorming with your team based on past experience, you might identify three distinct archetypes to represent these local community segments (though you could have more):

*Segments**	**A**	**B**	**C**
Geog. Area	Tribal area	Tribal area	Tribal area
Familiarity	Aware	Aware	Advocates
Age	15 – 20	17 – 30	25 – 35
Gender	Male	Female	Male
Employment	Unemployed	Part-time	Full-time
Farming Exp.	Some	Lots	None

** fictional example*

2. **Targeting:** Once your communities are segmented into sensible groups, it's time to choose specific ones to target. For each campaign you launch, try to target just one segment as your primary audience. You might also target a secondary segment in the same campaign, though that secondary segment should be around the same level of Familiarity with your organization as the primary target segment.

Much of what will inform your targeting decisions will rely on the type of messaging campaign you're launching and the social media platforms you're using (much of this will be covered in Section 4). But some targeting decisions can be made strictly based on the segments you've defined.

Consider once again the three segments we defined in the previous example. Segments A and B both have just a passing Awareness of your organization, which puts them in a much different category than the group of staunch advocates in Segment C. Therefore, campaigns targeting Segments A and B might focus on increasing levels of engagement for both segments with calls to action. Since both Segments have some level of Farming Experience, perhaps that call to action could be a farming workshop or a sign-up list for a free-to-use community tractor. As you can see, finding patterns between segments will greatly enhance your ability to target groups effectively and efficiently within your communities.

Flesh out the archetypes

WORKSHEET 2B:
Fleshing Out Archetypes
Personify the segments you identified in Worksheet 2A into more workable, human archetypes. This exercise will give you tips on how to find "nuggets of insight" that you can use to fine-tune your social media campaign messaging.

You've got the bones of a reference group; now flesh them out. As you carry out your social media campaigns for the coming years, you'll continually refer to the segments you've defined. Your goal in defining archetypes for each segment is to turn those groups of numbers and categorical demographics into something that resembles more of an actual person with unique personality traits and preferences. WORKSHEET 2B

Look at one of the segments you've identified, and think back to previous experiences and conversations you've had with real community members from that segment. Describe what you think a day in the life of a person in that segment is like. Try to base this day-in-the-life-of description on real stories from real people; avoid cliches and non-specific generalizations.

From the daily list of activities you define, identify unique activities and patterns that pop out at you — little "nuggets of insight" that might help you understand the qualitative things that make this segment special. Does an archetypal member of this segment have a second or third part-time job? If so, you might focus on the "job creation" parts of the new project you're promoting through social media. Or maybe you find that they usually start work earlier than most; social media posts targeting that segment might, therefore, be posted very early in the morning and during their early lunch breaks.

To get even more in-depth with your archetypes, try talking to real people who fall into your segments. At your next community meeting, or as you carry out your regular, daily organizational activities with your communities, try to pull aside some community members for one-on-one conversations — deep interviews that you can use to find more "nuggets of insight."

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Start the one-on-one interview in a quiet place that feels comfortable for both you and the interview subject. Let your subject know that the interview will take about 10 to 15 minutes and will help your organization better understand the unique needs of the communities that you serve. Start by asking your subject an open-ended question (not one that results in a one-word or yes/no answer) that will lead to him or her telling a story. Examples of an opening question might be:

- "Describe what your typical day is like, hour by hour."
- "Tell me about the most memorable experience in your life doing *[insert an activity related to your project/nonprofit here]*."
- "Tell me about a time in your life when you, or someone you know, might have dealt with *[insert problem your project/nonprofit is set up to address here]* in our community."

Listen carefully as your subject tells his or her story, and jot down any unique "nuggets of insight" you might hear. Probe deeper on that idea by asking follow-up questions that will result in deeper stories. Keep asking why, and you'll unlock deeper and more valuable insights. It is because of this need to drill down that follow up questions are much more important than perfectly crafted openers. And don't be afraid of silence; sometimes subjects need a second or five to collect and synthesize their thoughts in order to recognize things about themselves that they might have never really thought about before. Some examples of good follow-up questions include:

- "How did that experience make you feel?"
- "Tell me more about what led you to making that decision."
- "If money was no object, how would you change that part of your life?"
- "Tell me about another experience that made you feel the same as you felt during the experience you just mentioned."
- "What do you think you've learned from that experience, and how do you integrate those lessons into your life today?"

After the interview, look at your notes, and jot down all of the nuggets of information that you collected as a bulleted list. Then take your segment data and combine it with your list of nuggets to create a paragraph describing that segment as if it was a person — this is your archetype. Finally, give that archetype a fun name, like "Mom on the Move" or "Jobhunter Jedi Jane." As you craft social media posts in the future, you'll picture this archetypal person on the other end of the computer screen to make sure that what you're writing will be effectively and meaningfully communicated.

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WORKSHEET 2C:
Define Your Voice
This series of guided questions will help you to humanize your organization in a way that will best communicate with your segment archetypes.

Define your editorial voice

Since social media is all about having a conversation with your community, you need to consider the "voice" of your organization as you write. Does your organization speak more like an academic, using surprising statistics and sharing studies and documentary videos? Are you a grassroots organizer, passionate about issues and rallying people to action? Or are you more light-hearted, sharing photos of smiles from events and interjecting jokes and emojis into daily posts. How will you be human?

The success of whatever editorial voice you choose will be based on how well it resonates with the communities you're targeting, so thoroughly understanding your segments is key to defining how you'll package your daily messages. No matter what, though, you'll want to avoid constantly barraging your communities with salesy-sounding ads, self-serving promos, and robotic auto-posts.
WORKSHEET 2C

In Worksheet 1-A, you identified what makes your organization unique. In the same way that you created archetypes for your customer segments, take a moment to personify your own organization. Imagine that all of your segments' archetypes are together at a dinner party, and your organization's archetype is the host. As you walk from archetype to archetype and strike up dinner conversations, you might subtly change your tone, but your underlying personality will remain. What is the ideal personality type that will help your organization's archetype get along with as many segment archetypes as possible? It's this persona that will form the basis for an effective editorial voice.

Now that you know your communities...

It's finally time to start getting online. In this section, you segmented your communities, personified them into character archetypes and then defined an editorial voice that can best communicate with those archetypes. In Section 3, you'll assess the social media landscape in order to choose where to establish your empire of online accounts and start interacting with those communities online.

So say "tootaloo" to Section 2, and come with me to Section 3!

Section 3: Map the Social Media Landscape

Which online outreach platforms should you target?

The Internet is a vast and endless landscape. Tectonic plates shift with each new technological advancement, and how society adapts to those changes shapes its peaks of innovation and its darkest valleys.

On this endless online continent, businesses, individuals, nonprofits and tribes have established their social media empires. Within one empire might be its city center (website) and a series of towers (Facebook, Twitter, Instagram, etc.). Some towers might be tall, strong and multi-tiered. Other towers might be barely standing, either due to neglect or poorly built, inflexible foundations.

Don't let your social media empire become a ghost town. In order to ensure that your social media empire is built with a strong structural foundation on solid ground, it's important that you first map your social media landscape.

Survey the landscape to find out where your communities are and where you should establish your empire. Check on the status of towers you might have neglected. And take a look at neighboring empires to take queues from how others have chosen to nestle into the wilds. It's a brave new world!

Survey your communities

The first step in mapping your social media landscape is finding out where and how people in your target communities currently spend their time online.

According to a Pew study done in January, 2014, approximately 74% of online adults actively use some kind of social media account. If your community has access to the Internet, it's highly likely that they're scrolling through their News Feeds at least twice a week.

Talk to your target communities to find out what social media platforms they use and how they use them. A good place to start is with a formal survey aimed at as many community members as possible.

WORKSHEET 3A:
Sample Survey
A very simple, sample questionnaire illustrating the types of questions one might find in a community survey. Use these concepts to draft your own survey.

We've provided a template you can use to get started (WORKSHEET 3A), but there are some key points to keep in mind as you design your survey:

- **Keep it short:** No one wants to open a survey and see multiple pages worth of questions. Try to keep your survey to a single page. At the top of your survey, you might even write how long it should take to complete (between 1 and 5 minutes).

- **Avoid Yes or No questions:** Binary answers are not very useful. Follow up any Yes/No question with a 1-to-5-point scale, if you can. (Ex: Do you have a Facebook account? [Y/N] If yes, how often do you use it [A. 3+ times a day ; B. Once a day ; C. About once a week ; D. Once a month ; E. Less than once a month])
- **Use Likert scales when possible:** When appropriate, use a scale from 1 to 5 to collect richer, more meaningful data, especially for questions about how often, how likely, or how much they like something.
- **Avoid suggesting answers:** Though you may have a hypothesis of what your audience prefers, avoid leading people towards a certain response or asking them to simply confirm something you want to do. Plain language works best to avoid unintentional suggestion.
- **Allow respondents to opt in to a follow-up interview:** Include, at the end of your survey, a simple checkbox that says something like "Yes, you may contact me for a follow up interview." An opt-in box will not only give you willing interviewees but also ensure that you're complying with anti-spamming laws. For those who do opt in, don't forget to capture their name and preferred contact info.

Surveys can be distributed in print form or through an online service. Either way, make sure you qualify each response as coming from eligible members of your project community or tribe by including simple checkboxes asking respondents to identify their Native affiliations and other demographic identifiers while still allowing them to remain anonymous. For online responses, you might send the list to a qualified listserv of email addresses. Get a higher response rate and form relationships by distributing short survey during community meetings or events, with a box nearby for anonymous submissions.

Once you get your survey results back, gather the data and look at trends on a large scale. To ensure your data represents a statistically significant group, try to have at least 40 responses from each target segment. Use results to decide which social media platforms to use, and prioritize them based on survey responses.

If you included an opportunity for respondents to opt in to a follow up interview, try contacting respondents who represent distinct sub-groups within your target segments. Over the phone or in person, have a conversation with community members using the same deep interview tactics from Section 2 (page 9). Try to collect stories about how they use social media and how it fits into their daily lives — information you can use to craft your posting strategy.

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While these responses will give you an educated place to start, it's important to remember that it's just a starting place; once you start engaging your communities on social media, you'll adjust that strategy depending on how your community conversations evolve.

Check your own existing social media accounts

If your tribe or organization has been around for more than a few years, chances are high that you already have a social media presence established on the vast Internet landscape. Is your social media empire a ghost town? Perhaps your Facebook tower is in decent shape, but Instagram plaza is barely holding it together. Or maybe your social media structures need to expand to accommodate new outreach campaigns in your blueprints.

If you haven't established any social media accounts yet, don't worry. For the most part, social media companies make the process of creating new accounts as intuitive as possible, so it's really easy. In Section 4, you'll learn some best practices for filling out those profiles in ways that will get you noticed.

Start by acclimating yourself with each social media platform. If you don't already have a personal account on each platform you're interested in, try starting one. Oftentimes, a social media platform will lead new users through a short tutorial to familiarize you with all of its features.

Many social media sites, like Facebook, differentiate between business/organizational profiles (called "Pages" in Facebook) and personal profiles. In these cases, creating a personal profile for yourself as an individual — to be used independently from the organizational site you'll manage — is not only a good way to acclimate yourself with and explore the inner workings and culture of the social media platform but also required for administering a business Page.

If you're inheriting the social media manager role in your organization, start by asking existing staff about any past attempts at social media. Do a Google search to see what kind of existing web presence your organization already has online, and try searching your organization's name on each individual social media platform to be really sure.

While you're at it, take note of any organizations with similar names or usernames; you might use this information later to choose the perfect account name to avoid unintentionally promoting a similar sounding but different organization's social media accounts. If you find that someone is falsely impersonating you

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or your organization, know that most social media sites provide processes for verifying your account and eliminating fake accounts. You have a right to your organization's name.

While you're auditing your existing social media profiles, keep track of essential account administrator log-in info for each. Sometimes this will be associated with an email address on file; use the "Forgot Password" functionality of the social media site to reclaim control of these accounts. If no email address can be found or accessed, try contacting the social media administrators to manually reclaim access or change the associated email address. WORKSHEET 3B

WORKSHEET 3B:
Auditing Existing Social Media Accounts
Before you create a new account, make sure you assess your old accounts. Learn from your past failures and successes, and keep your online presence up-to-date.

In addition to essential administrator account information, also take note of more qualitative traits of your existing accounts. Some qualities to check out include:

- **Followers / Fans / Friends:** Each social media platform has its own metric for measuring the total number of people who are subscribed to receive messages, pictures and information that your organization posts each day.
- **Engagement:** While the total number of users is important, it means little if none of them have seen a post of yours in years. Most large scale social platforms have some type of integrated Engagement tracking system, allowing you to see charts and graphs mapping out how many people have seen, liked, commented on or otherwise interacted with your posts over time.
- **Frequency of Posts:** How often did your organization post or publish new content to Followers' News Feeds in the past? Was there a time when your account was very active? When did posting frequency start to die down?
- **Historical Successes:** Take a walk down memory lane, and peruse down your past posts. What types of posts worked best in the past? When did people seem interested? Which campaigns achieved their goals?
- **Other Nuggets of Insight:** Observe the page for any other patterns or trends you notice. Maybe all of your posed group photos start looking the same after a while? Perhaps reading through past posts on your social media profile reads like billboards down an interstate highway, like watching never-ending commercials on TV? Could you be more fun? Maybe more professional? Record your first impressions, too.

Store your observations, passwords and account administration info in a secure place, preferably in an off-line file on your computer desktop, or even on a printed

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piece of paper kept in a locked filing cabinet in your office. And give each social media platform, email account, and online profile its own, unique password. In your virtual city, making sure each social media tower has its own lock and key will limit your losses should one building's key get stolen by a hacker.

Assess the competitive landscape

As a pioneer establishing your social media empire on this vast virtual continent, you are innovatively building, on new territory, a new city custom-made for the enjoyment and culture of the virtual communities you work with. Yes, the thought of raising a brand new city from the ground up can be daunting, but don't think you need to start from scratch.

Like looking at how neighboring cities have chosen to build on the same wild landscape, start by assessing how organizations similar to yours have chosen to implement their own social media campaigns. Observing how others have done it can help you adapt parts of what's worked for them while avoiding what doesn't. That's why it's important to conduct a sound assessment of your "competitive landscape" before you jump headfirst into crafting your posting strategies; learning from the successes and failures of others can help you avoid some unnecessary pains of trial and error. WORKSHEET 3C

WORKSHEET 3C:
Assessing the Competitive Landscape
Find out what like-minded organizations are doing online. Learn from their strengths and weaknesses, find potential partners, and locate related user networks.

The "competition" in the phrase "competitive landscape" comes from the business practice of assessing the landscape of your business competitors (those offering similar products or services) in order to gain an economically competitive marketing edge. While there is a chance this may apply to your planned projects, most individuals using this ANA Outreach & Social Media Toolkit choose, instead, to look at like-minded organizations as potential partners rather than competitors.

In an effort to build a community and work together towards common goals, tribal and nonprofit organizations should take note of organizations with similar missions, overlapping target populations, and complimentary services or assets.

For each, take note of strengths and weaknesses that you observe, considering the same attributes that you assessed in the audit of your own, existing social media accounts in the previous sub-section. Questions to ask yourself might include:

- **What kinds of people follow, are fans of, or frequent this social media profile?** How many? Are any of these groups unexpected? Might any of these groups also be relevant to your communities' segments?
- **What are the strengths and weakness of the different social media platforms?** Are certain kinds of posts more effective on certain

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social platforms?

- **What are the strengths and weakness of how they use different social media platforms?** Are certain kinds of posts effective on one platform but not another?
- **What kinds of content do they share?** How do people interact with each type of post? What topics are they writing about?
- **What other organizations, groups, or businesses are associated with the one you're checking out?** How are they related? Could you tap into one of these secondary networks for potential project partners?

After doing this competitive landscape assessment, you might wonder why you've never partnered with some of these like-minded organizations before. Take this opportunity to reach out and form relationships through partnerships. Later, you might associate your social network profiles with theirs in order to tap into overlapping community networks you may share (see Section 4). If you plan on applying for a grant from the Administration for Native Americans, consider how these organizations might be a part of a grant-funded project as a project partner. Keep these assets recorded for later.

Look over the data you collected during your assessment. Find trends, analyze posting strategies, and consider types of content you could use as you craft your posting strategy in the next section.

Now that you understand your surroundings...

You're ready to bring the virtual city of your organization's online presence to life. Mapping your social media landscape was the last step in creating the blueprint for your soon-to-be-great social media empire.

In this section, you took a survey of your community to find out which social media platforms they use and how they use each. You audited your existing social media profiles to take inventory of your existing virtual assets. Lastly, you assessed the competitive landscape to learn from the social media strategies of like-minded organizations.

Now move on to Section 4, and let's get our hands dirty.

Section 4: Craft Your Posting Strategy

It's time to get your hands dirty.

Finally, the time has come: let's start posting some content!

You're now equipped with all of the background you need to start crafting informed, creative content that your communities will want to interact with. By looking back over what you've done so far, you'll find a comprehensive blueprint for your social media empire.

> In Section 1, you got to know who you are as an organization: consider how your posts will contribute to the social media goals you defined and if they convey how you, as an organization, want to be understood.
>
> In Section 2, you got to know your communities a little better: imagine your target archetypes reading each post you write, and write each using your unique voice to maintain honest conversations online.
>
> In Section 3, you got to know your social media environment better: surveying your audience showed you which social media platforms they actually use, auditing your existing social media resources inventoried the assets you have to work with, and assessing your competition revealed ideas you can adapt.

In this section, you'll finally create your social media profiles and open for business. You'll figure out how you'll use each platform, define types of content that you'll post, and then plan who will post them when in an Editorial Calendar.

Excited yet?

Open and fill out your social media profiles

If you've never created a new profile before, don't worry; social media sites make it really easy for new users to establish new accounts. For the most part, it's as simple as clicking a button and following on-screen instructions.

But where do you start? New social media platforms are launched all the time, and the popularity of each changes with each generation of users. No matter which platforms you choose to use, remember that you'll need to spend precious effort and time in order to manage healthy, engaging social media campaigns on each. Plan on spending up to *one hour per day per social network*.

Instead of trivially choosing which platforms you'll engage with based on overheard buzzwords and fly-by-night trends, base your decisions on evidence. Look back to the survey you did with your community to choose and prioritize the social networks you use. (WORKSHEET 3A)

RECALL:
WORKSHEET 3A:
Check responses to questions about which platforms survey respondents actually use and how often they use each. Use these answers to choose and prioritize the social media platforms you'll launch with.

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Remember, though, that how your communities use each platform can change over time, so regularly assessing the health of each will be vital to staying relevant. *It's better to focus on the most relevant platforms than taking a shotgun approach and creating a profile on every new platform you come across.*

No matter which platform you choose, the fundamentals for filling out your social media profiles are the same. Each social media profile represents your brand, the look and feel of who you are and what you do. Base your social media brand identity on a consistent set of values and qualities, and you'll maintain a consistent first impression for each person who visits your profiles. WORKSHEET 4A

WORKSHEET 4A:
Filling Out New Profiles
This checklist references info from previous worksheets, as well as general best practices, that you can use to fill out your new profiles.

In filling out any social media profile, you will have to consider two primary factors: text and visuals.

1. **Text:** Social media is a conversation. It's like a dinner party: come off too sales-y and your guests will tune you out like an unwanted commercial or display ad. Come off too academic or wordy, and you'll fatigue audiences who are just looking to relax. Instead, deliver emotion, interest, and/or fun!

An introduction to popular platforms

New social media platforms come and go. Resist going with the newest and trendiest platforms. Unless your organization is focused on technology or serves a techy, early adopter community, choose platforms that your community actually uses. While the list below introduces you to some of the Web's most popular platforms, keep in mind that it may not necessarily include the one that fits your organization or Tribe best.

- ***Facebook.*** The most full-featured standard platform. Five Facebook accounts are created every second. While Facebook still reigns supreme among social media platforms, many young people are going elsewhere.

- ***Instagram***. This popular photo-based platform was acquired by Facebook in 2012. Users can upload photos or short videos from their phones.

- ***Twitter***. Tweets of 120 characters or less define this platform. Twitter users share ideas, comment on real-time events, or report breaking news updates.

- ***YouTube.*** Billions of users watch millions of hours of video each day. Users subscribe to channels they like, and popular channels can get paid for views.

- ***LinkedIn.*** If your project promotes business or job creation, consider leveraging LinkedIn. The online professional resume hub is a hotbed social network for executives, especially looking to hire.

RECALL:
WORKSHEET 1A:
Use the 250-character description you created as a basis for filling out the "About Us" section of your profiles. Ensure that each social media profile conveys the "one word" that describes you.

RECALL:
WORKSHEET 2B:
Imagine that the archetype you defined is reading your profile for the first time. Good first impression?

The primary type of text you'll have to fill out on any social media profile will be your organizational bio. This paragraph should be concise and to the point, though it should also be written using words and in a voice that represents a "humanized" version of your organization.

Back in WORKSHEET 1A, you should have already created a 250-character bio – the perfect length for Twitter, Facebook, Instagram, and others. As you fine tune this paragraph, consider what makes an effective organizational bio:

- *Show, don't tell.* Talking about what you've done is more effective than bragging and inflating your brand. Answer the question "what have I done?" rather than "who am I?"
- *Choose keywords that will resonate with your audience.* As you write, imagine the segment archetype (a human being) you defined in Section 2 is on the other end, reading your bio. Choose keywords that will pique your archetype's interest. This will also help win Google searches and internal search queries as potential followers search for issues and topics they're interested in learning more about.
- *Avoid buzzwords.* By choosing classic language, avoiding trendy buzzwords, and steering clear of cliches, you'll create an explanation that will communicate with more types of people and stay fresh longer.
- *Build in a value proposition.* Before adding your content to their daily newsfeeds, potential followers, fans and friends who visit your site will subconsciously ask themselves "what's in it for me?" Build your answer to that question into your bio paragraph (ex: "Providing you with news, scholarship opportunities, and cultural event updates 24/7.")
- *Keep it human.* Social media requires a personal approach. Use language that colors the "personality" of your organization. Sound like someone your audience might want to be friends with.

After you've crafted the perfect description paragraph, remember to revisit it often, updating it according to changes in your organization, new examples of successes, and changing needs of your community. Ensure that these changes are made across all platforms to ensure consistency.

In addition to the basic bio paragraph, social media profiles may also ask for optional types of text. Be strategic in the words you choose: expand your networks by including topics, keywords, and phrases that your communities might search for online. And don't forget to list your website, if you have one.

2. **Visuals:** Do not underestimate the power of visuals on social media. Even if you have a powerful message to share, it can often go unheard without an accompanying photo. Good accompanying visuals help your content stand out from the mass of daily posts in followers' news feeds, where new content is published every minute, burying old content. In many cases, social media

algorithms priotize posts accompanied by images and multimedia.

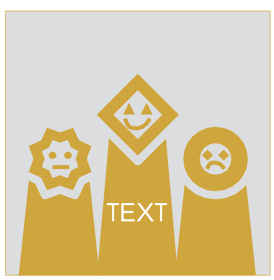
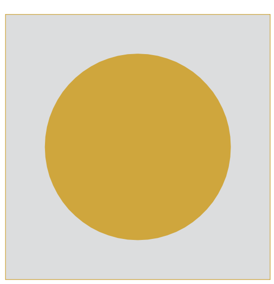
Good visuals will also be the first way that visitors to your profile will identify your organization's brand identity. Ensuring that each social media has a consistent look, using your most recent logos and brand colors, will make a huge difference in establishing a comprehensive brand that sticks in the minds of your communities.

While you can be as creative as you want with the images you choose to portray, keep in mind that each platform requires that you edit your images to specific size dimensions for specific purposes.

Common types of images you'll have to create include:

- ***Profile photos:*** The most important photo you'll have to consider for each social media platform. The profile photo, or profile pic, is your avatar on each social platform. Whenever your name pops up within a social media site, your profile photo will be there, too.

  Make sure your profile photo looks good when cropped into a 1:1, square frame. Your profile photo will be viewed at many different sizes, so make sure it works at both large and small scales. See the table below for pointers on creating a profile pic that scales successfully.

Large scale	Small	Result
		u At a small scale, details **FAILURE** in the image —such as the text and the smaller shapes — are lost. The image becomes too busy.
		ü A simple shape, such as a **SUCCESS!** logo, can be seen clearly at a small scale. The object in the image is large while avoiding the frame edges.

- ***Cover photos:*** In addition to a profile pic, most social media sites provide you space for a large banner-size image at the top of your profile called a "cover photo." This image can provide some additional character to your profile pic. For example, you might use your logo for your profile pic, but have a photo of the mountain range your organization works to protect as a cover image. The following month, you might swap out the cover photo for one promoting a weekend fundraiser, while the profile pic stays constant.

- ***Galleries/albums:*** While your social media profiles will generally fill to the brim with photos as you post daily content to each, pre-filling photo galleries at launch can help to communicate more about who you are using the "show, don't tell" philosophy. Consider launching with three "albums" of photos — each could focus on a different dimension of your mission, or perhaps some of your keystone projects. Use images of people when possible, connoting life and action.

- ***Video:*** Most modern social media platforms support rich multimedia, such as video. As a general rule of thumb, avoiding posting videos on social media that are longer than 3.5 minutes. At launch, you might consider posting an overview video about your organization. Free editing programs now exist to help you create videos that allow you to communicate your services through a human, organic appeal.

Remember your reasoning behind all of the choices you made in populating your new social media platforms with visuals and text, and ensure that these qualities are consistent across all of your platforms to maintain a strong, sticky brand identity.

Revisit these profiles often to make sure that your "About Us" information still accurately represents who you are and what you do, and mirror any change you make across all platforms.

Many social media platforms will also allow you to add "Friends" or "Groups" of your own, or to categorize your organization as belonging to a specific niche-based network. Choose these public associations strategically. Think about what kinds of people might be interested in exploring the categories and groups you're under. Consider how publicly associating with other organizations might connote partnerships or help you tap into adjacent markets.

Once all of your profiles are completely filled out, you can take a breath, but do not wait too long to start posting fresh, regular content. Don't let your newly established social media empire become a ghost town. Going for long periods of

RECALL:
WORKSHEET 3C:
From your competitive landscape assessment, did you find like-minded organizations? Publicly support each other and share networks of followers by "liking" or "following" each other's social media accounts. Consider sharing each other's posts to maximize reach and formally coordinating on outreach campaigns when possible.

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time without posting content of any kind can cause site algorithms to tag your organization's account as inactive, which means that your followers will see updates published from your account far less often, if at all.

On having your own website

Having a website without social media can be like owning a tiny island in the middle of a vast ocean; it's unlikely passersby will ever accidentally bump into it. However, as part of a healthy social media strategy, your website can be a powerful home base for a sprawling social media archipelago bridged by strategic communications. Benefits of having a website include:

- **A centralized library.** A website with a running blog allows you to write and house content on your website and then share it on each social media platform in ways that work best for each.
- **Immortal content.** Unlike social media, where old posts get buried as new content is posted, your website will archive content forever.
- **An online brochure.** Your site can also tell people more about your organization and what you do than you can fit on a social media profile.
- **Webforms, payment, and registrations.** Websites provide functionality not possible on most social media sites, like registering people up for events or accepting credit card payments.
- **Legitimization.** Having your own website lends your organization legitimacy. A custom ".org" domain adds trustworthiness, and being able to have "name@myorganization.org" email addresses denotes professionalism.

Creating a complicated website will take time and money, requiring working with a specialized professional to custom-code a site for you. Try looking within your organization or Native community for web contractors before looking outside.

In addition, many free, third party services now exist to help you create a template-based site for very affordable monthly rates with bundled services designed to hook your website into the latest social media platforms. These services will often also help you to acquire your custom domain name (your organization's name as a URL) and provide hosting services (storing all of the megabytes worth of content on their servers, which are then accessed online by whomever visits your site). Google around, and see which third party services work best for your needs.

While creating even a simple, one-page website or blog will help to bring cohesion to your content, you can still create a successful social media campaign without one. If, a year or two later, you decide to create a website, working it into your social media strategy should be relatively seamless.

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Define clear metrics

In Section 1, you defined goals for your strategic social media campaign. These goals were based on real results, stripping out the social network-specific jargon in order to focus on the real-life changes you hope to see made in your community, project or organization.

Now's the time to take those goals and translate them into the metrics that are unique to each platform. On Twitter, you might think in terms of tweets and followers. On Facebook, it might be Fans, posts, and engagement.

Quantifying your social media specific goals will be difficult without experience. Setting a goal is not always as simple as choosing a number and vowing to achieve it. If your Facebook account got 10 new followers last month, is that truly significant? If your target segment is a huge, nationwide demographic, then you might be off the mark. But if your community is concerned with a very specific niche, 10 new followers might be an achievement worth celebrating! Qualify each new Follower, Like or Fan as coming from a segment significant to you.

It is for this very reason that, as you define your metrics for the first time, it's more important to understand your unit of measurement than to define how many of each unit you're trying to achieve. Instead of stressing out setting trivial numbers, spend more time researching and learning exactly what each unit of measurement means for each platform. Should you be measuring the number of posts you make or how many people actually view each? What kinds of built in metrics exist for administrators of business pages? How might these metrics translate to the goals you set for yourself?

Over time, as you come to understand the culture of each platform and the level of activity your community expects on each, you'll be able to fine tune the frequency of posts, the number of followers you can hope to gain each week, exactly how many times the average user will engage with your brand, etc., based on actual data on what works and what doesn't that you observe over time.

At launch, though, you might base the target number attached to each relevant metric on what you observed during your competitive landscape assessment. Basing your numbers on those of your most relevant potential partners or competitors will give you the most educated hypothesis for what you could achieve. Over time, continually re-assess your progress and analyze what works for you; after a few months, you'll have a feel of what a realistic objective looks like (see Section 5 for details).

RECALL:
WORKSHEET 1B:
Look back at the goals you created in Section 1. Then look at the social media platforms you've decided to use. How might you use each social network to reach your goals? How would you quantify the change you're affecting through each platform's unique metrics (i.e. tweets, posts, likes, followers, friends, etc.)?

RECALL:
WORKSHEET 3C:
What kinds of numbers are organizations similar to your own pulling in on a regular basis? Base your goal metrics on similar organizations' for the most educated hypothesis of what you could achieve.

What do you have to share with your community?

As you sit at your keyboard, staring down a blinking cursor waiting for your genius wit to flood into a social media post, consider your archetypes at the other end of

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the computer screen. Step into their shoes. Would you want to be bombarded by promotional content, constant requests, and braggadocious announcements of awards? Or would they rather read interesting articles, watch inspiring videos, or smile at stories of success from your own community?

As you craft posts, remember to always *add value to the News Feeds of the communities you wish to reach*. Aim to delight, intrigue, inspire, educate, or amaze. Instead of selling *at* people, share conversations *with* them. If your archetype's News Feed was a television, you'd want your social media content to be their favorite TV show — not an annoying commercial.

Let's say, for example, you'd like to promote an upcoming public lecture. Simply posting a dry update like "Please join us for next week's guest lecture" doesn't really offer any value to your audience. Instead, you might share a short inspirational video featuring your guest lecturer, along with a text caption like: "Want to hear more from her? Join us next week. Follow this link to register for this free event!"

Or maybe you'd like to recruit volunteers to a cause? You could irritate your audiences by posting something like: "We need volunteers. Please help us. Sign up today." Instead, offer value to your audience's News Feeds by sharing a news story that illustrates the urgency of the cause your volunteers will support. Your accompanying text caption could highlight a significant excerpt from the article, along with a call to action like: "You can do something to help solve this problem. Follow this link to join our team of community volunteers."

Store ideas for content in categorized carts

Coming up with interesting and engaging posts from scratch each day can be a daunting expectation for any social media administrator. You can cut down on the creativity fatigue by pre-packing your posts into categorized content carts and unloading them as you need them.

Creating a cart strategy consists of five primary steps:

WORKSHEET 4B:
Packing the Content Carts
Plan and collect the kinds of content that you want to share with your communities ahead of time.

1. *Identify your core competencies.* What is your organization good at? Do you have experts who focus on specific issues? Are there specific parts of the community that you work with? By basing your content categories on your organization's core competencies, you'll not only have an easier time tracking relevant stories and generating strong content but also make sure that your posts reflect your brand.
2. *Create content carts.* Carts are cubbies for content. In practice, these carts may be simple categorized lists stored in a word processing document or spreadsheet. Carts help you organize ideas by content, allowing you to store and schedule your posts for later. If, for example, you found an inspiring video on Monday that your audience might

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be interested in, you could store it in your "Inspiration" cart for later. Perhaps you post something inspiring every Thursday; the video you stored on Monday may be just one of many to choose from, allowing you to pick the inspiring post that fits best with the goings on of the current week. Your content cart categories can be as creative as you like, but here are just a few examples:

- Calls for volunteers
- Tutorials
- Memes/Native humor
- Relevant news stories
- Partner shout-outs
- Blog posts from your website
- Inspirational quotes
- Community member spotlight
- Stories from elders
- Useful resources

3. *Collect content for your carts*. As you go through your day, keep your eyes and ears open for content that could fit into your carts. Packing your carts could be as simple as copying-and-pasting a URL into a spreadsheet with a one-sentence note as a reminder for later. As you pack your content carts, be sure to differentiate between "evergreen" and "limited time" content. "Evergreen" content will be just as fresh three months from now, while "limited time" content has an expiration date and becomes less relevant as time goes on. And get your team in on the action. Leveraging their various perspectives, backgrounds, ages and areas of expertise will strengthen your offerings and empower your team! Teams can share their cart content ideas with you online in collaborative documents (like Google Docs), via email, or through their personal social media accounts.
4. *Consider reposting content from others*. In Section 3, you identified like-minded organizations and potential partners on each of your social media platforms. Strengthen these partnerships by re-posting content originally posted on their accounts when relevant. Common online courtesy requires you always credit the originator of the content you re-posted, and remember to tag your partner org's page in your acknowledgment. By re-posting from and acknowledging a variety of different online partners, you'll not only strengthen organizational relationships but also game social media algorithms to prioritize the ranking of your posts in your subscribers' content feeds.
5. *Schedule the un-packing of carts on your Editorial Calendar*. You now have some content packed into your curated and categorized content carts; don't let that content go stale. Unpacking your content and posting content according to regularly scheduled intervals on an Editorial Calendar ensures that you'll cover all your bases and tap into all of your stored ideas equitably.

As you can see, collecting content and storing them in carts is a constant, ongoing process — but a relatively passive one that will save you a lot of time in the long run. While this process will certainly help to make your life as a social media administrator easier on a day-to-day basis, it's important to remember that social media is dynamic and responds to the ever changing events of real life.

In addition to your core content carts, you may sometimes have need for temporary carts. Sometimes these temporary carts may be seasonal, like a tribe promoting its annual powwow might use. Other times a temporary cart may contain a one-time campaign that will last for a finite amount of time, like a nonprofit responding to a string of youth suicides or a school celebrating the construction of a new library.

Real-time events — especially those that intersect with your organization's core mission and projects — almost always take precedent over regularly-scheduled cart content. In these instances, your communities may look to you to educate them on a topic, to provide moral guidance and empathetic support, or to hear your perspective on an issue in the form of a formally issued statement.

At the end of the day, what you choose to post is up to you. These tools exist just to support your creativity and make your life easier, not to trap you in a box of your own making.

Create your Editorial Calendar

Though you may have to respond to real-time events as they happen, a well-crafted social media strategy should be based around an Editorial Calendar that lists the dates you intend to post each type of content you've been storing in your carts.

WORKSHEET 4C:
The Editorial Calendar
Decide who will post what kinds of content when. This perpetual workplan calendar will help you spread the work-load amongst your team and organize the types of content you'll be sharing.

A good Editorial Calendar projects at least 30 days into the future, allowing you to prepare the perfect mix of temporary and core content carts based on what will be important in that particular month. Scheduling in advance ensures that you'll spread various types of content across each week on each platform. A good Calendar can even help keep you from getting burnt out by cycling posting assignments to various members of your team from day to day.

How you choose to spread topics across your calendar is up to you; it's the diligence inherent in the process of scheduling that's most important.

You might choose to post a short video from your "Staff Spotlight" content cart every other Friday. Or you could help combat your communities' mid-workweek blues with a joke from your "Native Humor" content cart every Tuesday afternoon.

A strong strategy also takes advantage of social media trends; for example, the #ThrowbackThursday meme has users post retro photos of themselves each Thursday — you might take advantage of this potential to go viral by posting a captioned photo from your "Historical Tribal Photos" concetn cart every Thursday, accompanied by the hashtag "#TBT."

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While you're pulling content from core carts based on daily, oftentimes recurring themes, you may also need to promote an upcoming event from a temporary cart simultaneously. Remember not to flood followers' feeds with self-promotion. The most effective way to promote an event is by scheduling a drip marketing strategy.

A sample drip marketing strategy

Promoting an event requires strategic planning and good timing. A good drip strategy targets your event date on your Editorial Calendar, allowing you to schedule proper promotions in the timeline leading up to and following your event. The following is a sample of a drip strategy that an organization might adopt for promoting a two-day mini-conference:

- ***2 months before.*** Announce the event as soon as it's ready. Provide an incentive for early bird registrants. Create an Event page on each platform. Link to a page on your website that you can update as event details are solidified.

- ***2 weeks before***. Generate excitement by sharing relevant, inspiring stories. Promote various workshops to pique interests of different kinds of people.

- ***A couple days before***. Stress the urgency of registration by using phrases like "last chance" and "before tickets sell out." For existing registrants, share practical information, like where to park and what to expect.

- ***During event.*** Post lots of photos. Tweet recaps of lectures. Encourage attendees to tag their own posts using a custom event hashtag of your creation.

- ***Post-event.*** Invite attendees to recall experiences. Post links to additional resources related to workshop topics. Take advantage of momentum with creative calls to action, like promoting a related lecture happening next month.

Consider the frequency of your posting on any given day. For some platforms, posting a few times a week might be enough. On Facebook, you'll probably post content at least about once a day, while Twitter users might expect updates three or more times a day.

As you start to become more comfortable with posting on your various social media platforms, you might also consider paid third-party services — like Hootsuite, Buffer, and TweetDeck — that can actually pre-schedule your posts for you, automating much of the posting process based on your Editorial Calendar. Many social media platforms even have these automation features built in for you to use for free.

Now that you've got a content posting plan...

Keep that fresh content flowing. In Section 4, you got your hands dirty with posting real content to real social media platforms.

You went deep into pro posting strategies for the social media administrator. You established and populated your own social media accounts. You anchored these social media outposts to your own website. You learned to earn your way to the top of your communities' content feeds by adding value rather than selling at them. You created carts of content to store ideas for future posts, and then you created an Editorial Calendar to schedule when you'd actually post content.

Now we're cooking! While your newly-formed posting strategy will treat you well for the next few months, how will it fare in the long term? The social media landscape changes drastically as technology advances and trends change; can you adapt? And do you know if you'll still be hitting your goals?

To keep your social media plan alive, let's move on down to Section 5.

Section 5: Track, Analyze and Improve

Will your posting strategy stand the test of time?

Your social media empire has finally taken shape. As the mayor of this newly established city, you hold a well thought out city plan in your hand as you jump headfirst into your role of management.

But a good city plan needs to respond to changing conditions in order to support a growing, thriving city. Populations will grow and ask for new things. City infrastructure will require maintenance and sometimes complete overhauls to keep pace with technological advances. Natural disasters may require you to take drastic measures. And, at some point, you may even need to pass your plan over to a new mayor.

Ensuring that your social media posting strategy stands the test of time requires a good social media administrator to remain both disciplined in your adherence to your plans and flexible in your ability to adapt to changing conditions.

In this final section of the ANA Outreach and Social Media Toolkit, you'll learn strategies for managing the long-term success of your social media plan. By investing the ongoing maintenance of your social media communities, your organization will enjoy accelerating returns on your time investment for years to come.

Stoke relationships by facilitating conversations

Social media administrators sometimes fall victim to the fallacy that simply posting content once or twice a day is enough, as if those posts will do the work of cultivating a community for them while they ignore their social media accounts for the rest of the day. The reality couldn't be further from the truth.

In previous sections, we discussed how facilitating community conversations online is like hosting a dinner party, requiring you to bounce from group to group as you share stories, keep interest high, and respond to the unique personality types of your guests. Over time, this party will continue to grow in size; your responsibility as host is to keep the momentum rolling and the vibe strong.

In your social media platforms, your primary role as administrator is to serve as a facilitator of conversations and relationships. There are two primary channels that you'll facilitate: the one between you and your communities, and the ones that exist between individuals within your communities.

Maintaining the relationships between your organization and individuals in your communities requires you to respond quickly and efficiently to individuals' needs. In the Internet Age, where a quick Google search pings millions of results and a

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product ordered from Amazon can arrive at your doorstep the next day, people expect nearly instantaneous response rates. Acknowledge this expectation. Set up your social media profiles to give you alerts when you receive direct messages, so that you can respond right away. If a community member comments on a post you made with a question about that post, be sure to respond to that comment within a few hours. If a partner organization shares a post of yours, acknowledge and thank them promptly. Besides managing your customer service level, having a rapid response rate will build and strengthen relationships between you and your communities over time.

But a community is more than just a two-way relationship between you and them. In a healthy community, other community members also find connections with each other. Your tribe or organization should work to facilitate those connections, strengthening the bonds between people over some shared interest, goal, or concern. Spark conversations online with interesting prompts — you might end a post with a question, inviting community members to respond in the comments section with their own perspectives on an issue.

Oftentimes, these comments from various individuals on a single post can turn into dialogue that can lead to expanded perspectives and mutual understanding. In this way, debates in comments sections (or via traded tweets on an issue) can be healthy and productive, but they can also break down into vitriol. Your job is to both stoke and referee these conversations. Stoke them by asking follow-up questions, in the form of post comments, to prompt new ideas. Referee debates by monitoring posts for civility while allowing space for passion and differing opinions. In some cases, you may need to flag or report individuals who are purposefully vulgar or disruptive. You may even need to kick them out of the group if their destructive behavior persists after a few direct warnings.

Facilitating these types of conversations is how you cultivate an online community. However, not every member of your community will feel the urge to participate directly in every conversation or debate. As a general rule of thumb, remember the 80-20 rule: about 80% of the content contributed on your social media accounts will come from just 20% of your total audience base — and that's OK. Allowing community members to contribute however they feel comfortable is part of what creates an online environment of openness and trust.

RECALL:
WORKSHEET 1B:
Look back at the goals you created in Section 1. As you hit goals, increase your target numbers. Change metrics when necessary. As you learn more, fine-tune your targets.

Track and update your goal metrics

In Section 1, you created real world metrics that made sense for your organization. Then you translated those goal metrics into social media platform-specific metrics.

As you continue to use those metrics to track the progress you're making en route to goals that are important to you, remember that the goals you created represent a snapshot in time. As more and more time passes, those metrics may start to

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become irrelevant. Periodically consider whether or not the way you're measuring your progress still makes sense, and change them if they don't — but only as necessary. Change your target too much and you won't know whether or not you're making progress towards your goals.

Each social media platform usually provides organizational users access to some type of built-in analytics dashboard. Combing through the real-time data that these dashboards provide will make it easy to track progress towards your goals while providing you with deep insights you can use to improve the way that you communicate with your communities. Common types of analytics data include:

- **Analytics on overall growth.** Seeing how your total number of followers, likes, fans, etc., can give you a sense of the large scale growth of your community's populations. Is growth accelerating? Slowing? Or maybe people have been leaving? Ask yourself why.
- **Analytics on demographics.** Because user activity is linked to their personal profiles, analytics data can be surprisingly specific about the demographics of your communities. Tracking the age ranges, genders, geographic locations, and other stats about your population can help you fine-tune content and track progress against your unique goals.
- **Analytics on specific types of content.** Data can also help you understand which types of posts are popular and which fall flat. Do certain topics consistently garner much less attention? You may want to reconsider that content bin. Do images of regional maps get more Likes than photos of beautiful landscapes? Use that data to fine-tune your posting strategy.
- **Analytics data over a time period.** Dashboards often allow you to chart growth metrics over time, which you can use to correlate causes. For example, you may find that the spike in engagement last month might be related to interest in the protests that were going on in neighboring tribal lands at the time. You might also use this to correlate audience increases with specific off-line promotional campaigns; one could safely assume that the surge of new followers immediately following last week's public lecture was probably a direct result of your guest speaker promoting your Page.

There are many other creative ways of interpreting analytics data, and paid third-party services exist to help you delve even deeper into analysis.

Don't let your posting plan stagnate

You have a plan. Now follow it. The first few months you might be fired up to execute your fresh plan, but it's easy to forget about following through six months later if you haven't been staying engaged with your communities.

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Automating posts and sharing content generation responsibilities can help you avoid burning out, but it does little for motivation. Staying fired up requires affirming to yourself each day the power of social media to affect real organizational change. Maintaining real relationships can help you stay actively engaged rather than feeling like it's a chore. And once you see real returns coming from your social media investment, maintenance will make much more sense.

Each month, as you make your Editorial Calendar, consider what you've learned over time, and integrate it into the next month's strategy. What have you learned from analytics data? From your in-person work and deep interviews with your communities, do you know more about a day in their life than you did before? As you get more advanced, you might even look at the times of day that you should be posting to optimize the potential reach of each post.

Social media is also always changing, and it requires you keep up. Do your research. Keep in touch with your community members (off- and on-line) to track changing tastes. Follow tech blogs and subscribe to updates from social media companies to track the cutting edge. Types of changes to track and respond to include:

- **Layout and appearance.** Social media platforms change their look to fit new screen sizes, to highlight different kinds of content, or to modernize their aesthetics. When layouts change, you may need to update the resolution or size of your images. Look for new opportunities for branding.

- **New features.** As social media companies battle each other for your attention, they'll often add new features that users want, like in groups, event pages, multimedia, and more. Use them to enhance your value.

- **New methods of content delivery.** Some features allow you to deliver content in new, innovative ways. For example, increases in average bandwidth capacity has led to the integration of more live streaming, which you could use to broadcast events, presentations, concerts and contests live to the world.

- **Trends among users.** The cultural zeitgeist of the Internet breeds new trends ranging from the profound to the bizarre. While you might not participate in every fly-by-night meme, being aware of them can help you avoid miscommunications and leverage larger conversations.

- **Changes to internal algorithms.** Each social media platform employs a proprietary algorithm to rank and weight the value of the content you post. This ranking affects how often your users see your content compared to content from others. Internal algorithms consider a variety of variables, like how many of a user's friends liked the post, how active you are, and whether or not you include multimedia. Understanding and adapting to changes in these algorithms can help you crack the code of outreach maximization.

WORKSHEET 5A:
Updating the Strategy
As you carry out your campaigns, take moments to stop and re-assess what's working and what's not. Use this set of guided questions as a standardized baseline.

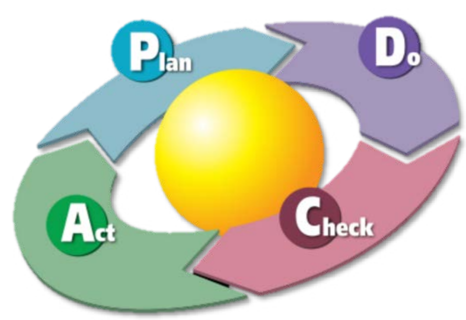
▶▶▶

- **New social media platforms.** New social media platforms will always try to join the marketplace, but few will succeed. Look back to the fundamentals you learned in previous sections before jumping on the newest, hottest platform. Doing so will spread your efforts thin. Just because millions may be flocking to a new platform doesn't mean that your community is among those millions. And who's to say the new platform will still be around a year from now? It's best to sit back and wait before re-allocating resources, relying on your ongoing relationships with your community members to inform your decision to move platforms.

In addition to revising your plan, staying fresh also means responding to real-time events. Weigh in on issues that your community is interested in. Provide guidance and perspective on troubled times. Highlight same-day news stories relevant to your community. Tracking which topics are "trending" regionally on any given platform can enable you to leverage its popularity to boost your own posts' potential impact.

Plan, do, check, act

In your ongoing quest to continually improve the effectiveness of your social media plan while adapting to a changing external environment, you'll need to continually tweak and implement new solutions.



The PDCA cycle of constant improvement is a tool that can assist you in handling your workplan improvements logically and systematically, enabling you to gain continual increases in the efficiency and quality of your posts.

Each time you're confronted with a problem that requires a new solution in your plan, follow the 5 stages of the cycle.

1. *Plan*. Identify what it is that you want to improve. Set benchmarks.
2. *Do*. Brainstorm possible solutions. Choose one, and run a test on a small scale.
3. *Check*. Measure the effectiveness of your test by comparing new data to baseline data. Modify your solution or test a different solution.
4. *Act*. Once you've fine-tuned a solution that works, implement it.
5. *Repeat*. Things change; so too should your solutions.

The idea is simple, but having a process like PDCA in your back pocket can help you remain cool under pressure when unexpected problems require quick adjustments to your social media plan.

▶▶▶

Now… you've got it!

Congratulations! You've made it to the end of this guide! As a newly-minted social media administrator, you're now equipped with the strategies necessary to carry out a successful social media plan for your tribe or nonprofit organization.

> In Section 1, you got to know who you are as an organization. You defined social media goals that make sense to your organization, and you considered how you, as an organization, want to be understood.
>
> In Section 2, you got to know your communities a little better. You fleshed out target archetypes that you can imagine reading each post you write, and you composed a unique voice to maintain honest conversations online.
>
> In Section 3, you got to know your social media environment better: surveying your audience showed you which social media platforms they actually use, auditing your existing social media resources inventoried the assets you have to work with, and assessing your competition revealed ideas you can adapt.
>
> In Section 4, you established and populated your own social media accounts. You anchored these social media outposts to your own website. You learned to earn your way to the top of your communities' content feeds by adding value rather than selling at them. You created bins of content to store ideas for future posts, and then you created an Editorial Calendar to schedule when you'd actually post content.
>
> Finally, in Section 5, you learned how to ensure that your social media plan will stand the test of time. You considered your role as a facilitator of online conversations. You learned to update your goal metrics using analytics data. You came to understand the importance of regularly updating your plan to keep it fresh, and you were equipped with the power of the PDCA cycle as a logical process for integrating solutions to emerging problems into your living social media strategy.

As you may have already noticed, most of the strategies presented in this toolkit you can apply to any type of community outreach, even offline. These strategies are not tailored to any one specific social media platform, allowing you to adapt what you've learned to current or emerging platforms, to your website, to your email newsletter or even to the one-on-one work you do on the ground level with members of your community. If you're interested in learning specific, technical skills for any one particular platform, consult their online Help documentation, FAQs or user groups.

The U.S. Administration for Native Americans is happy to provide you with this free resource to help you empower your Native communities.

Worksheet 1A — Describe Your Organization

INSTRUCTIONS:
This guided set of questions is designed to help you analyze the purpose of your organization and how you might communicate it to others in various contexts, allowing you to quickly and succinctly represent yourself in short-form social media profiles and posts. Take a minute or two to discuss each question with your partner. Fill each box with your answer. Note related ideas that may arise. See Section 1 for details.

Write out your full mission statement here. While this statement does guide the charitable purpose of your organization, consider how well it works naturally in conversation.

You bump into a friend who you haven't seen since childhood. How do you quickly explain to him/her what your organization does?

List some of your organization's strengths / core competencies:

- __________
- __________
- __________
- __________
- __________
- __________
- __________

In one word, what is your organization's essence? Ex: Disney=Magic, Volvo=Safety, Apple=Innovation

____

In 120 characters or less, write the social media description for your organizations. This description will be your default "About Us" paragraph to populate your social media profiles. Incorporate information from the boxes above. Keep it human and conversational. Remember that spaces and punctuations count as characters.

____

____

____

Worksheet 1B **Define Your Social Media Goals**

INSTRUCTIONS:
Craft up to three social media goals for your organization. Make sure each is specific, measurable and time-bound. Think in terms of what your organization needs, not in terms of any specific social media platform or any platform-specific metrics. Instead, these goals will later help you choose the platforms best suited to further your goals. Though you might add a fourth, try to keep it to three or fewer. See Pg. 3, Sec. 1 for details.

Social Media Goal #1	*Goal Type:* ☐ Awareness ☐ Sales ☐ Loyalty ☐ Other: ________ *Time frame:* ________ *Key metric:* ________
Social Media Goal #2	*Goal Type:* ☐ Awareness ☐ Sales ☐ Loyalty ☐ Other: ________ *Time frame:* ________ *Key metric:* ________
Social Media Goal #3	*Goal Type:* ☐ Awareness ☐ Sales ☐ Loyalty ☐ Other: ________ *Time frame:* ________ *Key metric:* ________

Worksheet 2A Segmenting and Targeting

INSTRUCTIONS:
Focused social media campaigns are more effective. Identify smaller segments within your community to fine-tune your posting strategy. This worksheet is a guide to identifying segments in your community. Fill out multiple sheets if you can identify a fourth or fifth segment.

First, identify segments within your existing communities. Estimate based on experience. Add categories that are meaningful to your organization..

	Segment A	Segment B	Segment C
Geographic Location			
Familiarity with Your Org.			
Age Range			
Gender (Majority)			
Employment Status			
Other: ______________			
Other: ______________			
Other: ______________			

Next, consider how you might target each segment. Different segments require different strategies.

Segment A How can you best target this segment?	Which targeting strategies do you think *will not* work?
Segment B How can you best target this segment?	Which targeting strategies do you think *will not* work?
Segment C How can you best target this segment?	Which targeting strategies do you think *will not* work?

Worksheet 2B — Fleshing Out Archetypes

INSTRUCTIONS:
By creating theoretical human archetypes from the segments you defined in Worksheet 2A, you can imagine a real human reading your social media content. Answer the questions and then fill out the archetype statement at the end of the sheet. For additional diversity, repeat the exercise, and create a variation by fleshing out a different person from the same segment.

Segment Being Considered *(circle one)* 1 2 3 Other	**Variation No.** *(circle one)* 1 2
Copy from Worksheet 1A: Geographic Location ______ Familiarity with Your Org. ______ Age Range ______ Gender ______ Employment Status ______ Other: ______ Other: ______ Other: ______	**What would this person like to *accomplish* through your organization?**
Describe this person in a single *adjective*:	**Three unique *insights* you've learned about people in this segment that those who haven't spent time with them might not know.** 1. ______ 2. ______ 3. ______

Now give this person a human *name*: ______

Now use your info to fill in the blanks. Keep this archetype statement as a portrait of your audience as you craft content targeting this segment.

______ (NAME) is a ______ (AVG AGE) -year-old, ______ (ADJECTIVE) , ______ (GENDER) ______ (OCCUPATION/ROLE)

who wants to ______ (**GOAL TO ACCOMPLISH** (START WITH VERB))

because / but, surpisingly / and ______ (INSIGHT(S))

Worksheet 2C Give Your Organization a Voice

INSTRUCTIONS:

Don't make social media stale. It's all about having relationships with your communities. By defining the voice and tone of your organization, you can strengthen those bonds and establish a consistent personality. Take one minute to discuss each question with your team member. Record your answers in the boxes below in order to define a marketing persona for your organization.

If your brand was a person, what kind of personality would it have? What would his or her relationship be to your community? (coach, friend, teacher, parent, etc.)
Describe in adjectives
How do you want your customers to think about your company?

Sample Survey 3A Survey Your Communities' Social Media Habits

INSTRUCTIONS:

Below you will find a very simple sample questionnaire that can inspire a questionnaire of your own. Remember to avoid Yes/No questions. Qualify responses; in addition to the sample questions, you might ask for simple demographic data.

Thank you for participating in our community survey. Your feedback will help us to improve how we communicate with our community. Filling out this survey should take approximately 1 minute.

How often do you use the following social media platforms:	MORE THAN ONCE A DAY	DAILY	EVERY OTHER DAY	ONCE A WEEK	ONCE A MONTH	NEVER	NO ACCOUNT
Facebook:							
Twitter:							
Instagram:							
Snapchat:							
Other: ______________							

How important are the following issues for you:	1 (NOT IMPORTANT)	2	3	4	5 (EXTREMELY IMPORTANT)
Learning about issues					
Cultural stories					
Photos from Events					
Event Announcements					
Other: ____________________					

Please specify your Native affiliation / ethnicity. Check all that apply:

- ☐ Native American Tribal Member
- ☐ Native Hawaiian
- ☐ Chamorro/Guam Native
- ☐ Tokelauan
- ¨ Alaska Native
- ¨ Native American Samoan
- ¨ CNMI Native
- ¨ Other(s): ________________________________

May we ask your opinion? If you wouldn't mind being contacted for a short 5- to 10-minute follow-up interview, please fill out the fields to the right:

Your Name: ____________________________________

Your Phone Number: ____________________________

Good Time to Call: _____________________________

Worksheet 3B Auditing Existing Social Media Accounts

INSTRUCTIONS:
Use this worksheet to audit some of your existing social media accounts. Record basic information—including usernames and passwords—and then assess qualitative aspects of each platform, up to 3 per worksheet (copy or print more if needed).

Social Media Platfom #1:		Date Assessed:
Name: URL: Last Activity Date: # Followers/Fans:	Strengths:	Communities Represented:
Acct Administrator(s): Passwords?	Weaknesses:	Connected Partner Pages:

Social Media Platfom #2:		Date Assessed:
Name: URL: Last Activity Date: # Followers/Fans:	Strengths:	Communities Represented:
Acct Administrator(s): Passwords?	Weaknesses:	Connected Partner Pages:

Social Media Platfom #3:		Date Assessed:
Name: URL: Last Activity Date: # Followers/Fans:	Strengths:	Communities Represented:
Acct Administrator(s): Passwords?	Weaknesses:	Connected Partner Pages:

Worksheet 3C Assessing the Competitive Landscape

INSTRUCTIONS:
Use this worksheet to assess your competitive landscape, and learn from what others are doing well—or not so well. Our nonprofit organizations and tribes often work toward goals shared by like-minded organizations; you might think of them as potential partners rather than competition, while other organizations might truly be opposition to a cause. Fill out one or more sheets per social media platform.

Social Media Platform Assessed:	Date of Assessment:

Organization	Strengths	Weaknesses	Stats
Name URL			# followers: posting freq: date est'd:
Name URL			# followers: posting freq: date est'd:
Name URL			# followers: posting freq: date est'd:
Name URL			# followers: posting freq: date est'd:
Name URL			# followers: posting freq: date est'd:
Name URL			# followers: posting freq: date est'd:

Ideas? Feeling inspired by a page you've visited? Jot those ideas down here, and implement them later.

Worksheet 4A Filling Out New Profiles

INSTRUCTIONS:

This checklist will point you to information from previous worksheets, as well as general best practices, that you can use to fill out your new profiles. Ensure that each social media profile is filled out thoroughly to optimize searchability using information that makes your organization's value proposition consistent across platforms. If you need extra space, write on the other side of the paper, or start a new document.

Social Media Platform:	Date Established:

ACCOUNT:

☐ **Administrators chosen and connected to account?** Who? ______________________

☐ **Account username chosen and secured?** If org name is taken, be creative or file dispute with social media company.

☐ **Strong password chosen?** Best option: Random generated password, stored in print. ____________

☐ **Which email account did you use to register?** ______________________

VISUALS:

☐ **Profile pic added?** Use logo or representative image.

☐ **Cover photo added?** Choose an image that brings your mission to life.

☐ **All images at optimal sizes?** Consult social media help documentation for details.

☐ **Images consistent with accounts on other social media platforms?**

☐ **Created at least one photo gallery?** If applicable.

TEXT:

☐ **Bio paragraph filled out?** Start with what you wrote in Worksheet 1A.

☐ **Profile information filled out?** Add details, fill out thoroughly.

☐ **Does profile reflect organization's "personality?"** (Worksheet 1A)

☐ **Have you made a value proposition to visitor?** Potential followers will ask "What's in it for me?"

☐ **Have you used keywords tailored to your audience?** Consider words/phrases they might search for.

☐ **No typos or grammatical errors?**

PLATFORM-SPECIFIC CONSIDERATIONS:

☐ Other: ______________________

☐ Other: ______________________

☐ Other: ______________________

Worksheet 4B Plan and Collect Your Content Carts

INSTRUCTIONS:
Content carts allow staffers to pull and store content as they find them, allowing you to quickly post a variety of content from carts relevant to your social media campaign without coming up with interesting posts from scratch each time. Define each cart category (photos, testimonials, event announcements, tutorials, inspirational quotes, jokes/memes, volunteer spotlight, etc.). Designate each as primarily Evergreen (good any-time) or Time Sensitive (must post soon). While all staffers can gather content, a designated staff expert can validate/edit each cart's contents. In practice, you might store post ideas, links, photos and content on shared staff folders or cloud-based share drive.

Content Cart 1 — _ TIME SENSITIVE OR _ EVERGREEN	Content Cart 2 — _ TIME SENSITIVE OR _ EVERGREEN
STAFF EXPERT:	STAFF EXPERT:
Content Cart 3 — _ TIME SENSITIVE OR _ EVERGREEN	Content Cart 4 — _ TIME SENSITIVE OR _ EVERGREEN
STAFF EXPERT:	STAFF EXPERT:
Content Cart 5 — _ TIME SENSITIVE OR _ EVERGREEN	Content Cart 6 — _ TIME SENSITIVE OR _ EVERGREEN
STAFF EXPERT:	STAFF EXPERT:
Content Cart 7 — _ TIME SENSITIVE OR _ EVERGREEN	Content Cart 8 — _ TIME SENSITIVE OR _ EVERGREEN
STAFF EXPERT:	STAFF EXPERT:
Content Cart 9 — _ TIME SENSITIVE OR _ EVERGREEN	Content Cart 10 — _ TIME SENSITIVE OR _ EVERGREEN
STAFF EXPERT:	STAFF EXPERT:

Do you have any special initiatives or short-term campaigns? List them here, and think about any deadlines, event dates, partner tasks, etc., related to each.

Worksheet 4C

Craft Your Editorial Calendar

INSTRUCTIONS:

Your Editorial Calendar can help you organize your posting strategy for a particular social media campaign. This worksheet, based on ANA's Objective Work Plan, will help you to plot out activities in an objective-oriented workflow. Choose content from bins you defined in Worksheet 4B that relate to this campaign, decide who will post what content when, and define a metric to assess the effectiveness of each content type.

Campaign Objective:	Content Cart(s):

Posting Activity	Staff	Date	Target Metric

Worksheet 5A — Updating the Strategy

INSTRUCTIONS:
Use this worksheet to regularly reassess progress you're making toward your social media goals (from Worksheet 1B). Answer the set of self-guided questions once a week, month, or year—the choice is yours to maintain. Learn from what worked and didn't work. Re-examine your goal, and then, if desired, update your goal for the next period. Finally, articulate three changes you can make to reach that goal.

Social Media Goal from last period: *Restate a goal from Worksheet 1B*	What has been working for you?
	What hasn't been working so well?

Layout up to date? New features you could use? New media formats? Policy changes with company? How is platform changing?	**What have you learned about your community?** Trends? Change in demographics? Opinions?

Social Media Goal for next period:	**In order to reach this goal, I should make the following changes:** 1. 2. 3.

ANA AS A PARTNER IN SOCIALMEDIA

As you build your social media presence, remember that ANA wants to help share the successes of its grantees. We've always asked that you let us know when you are mentioned in the media, but now we want to share your content too! With twitter, the ANA Messenger newsletter, and the ANA website at our disposal, we'll help you put the word out to build interest in your project and keep the momentum going.

WHAT MESSAGES CAN ANA SHARE?

When asking ANA to share content or tagging #ANAgov in your media posts, just remember that any messaging must also relate to ANA's work as well. So try and keep your requests and media mentions shared with us focused on your ANA-funded project or some other topic related to ANA's work. Below are a few examples of ways in which ANA can be a partner in your messaging.

- Are you offering an internship through your project? ANA is happy to share the announcement on our website in the News section. We'll simply need a brief description of the opportunity, a closing date, and link to the application page or further information.
- Are you a recent grantee who wants to share your success? Let's see if we can't work together to draft a success story based off of your achievements.
- When tweeting about your ANA-funded project, remember to add #ANAgov. We will also retweet your content to share with all of ACF's followers.

GOOD/ BAD EXAMPLES OF RETWEET MATERIAL:

Good:

@Intersections hosted several performances carried out by #NativeYouth through their Tupulaga Ta'iala project!

This tweet refers to participants in an ANA-funded project

Bad:

@Intersections wishes everyone a Happy New Year.

This does not relate to ANA or its efforts.

TOOL 3: PUBLIC RELATIONS ASSESSMENT QUESTIONNAIRE

1. PROGRAM NAME AND ADDRESS

2. WHO IS RESPONSIBLE FOR YOUR PUBLIC RELATIONS?

3. WHAT IS YOUR CURRENT BUDGET FOR PUBLIC RELATIONS?

4. HOW OFTEN IN THE PAST YEAR HAVE YOU DONE THE FOLLOWING?

_______ Press Release
_______ Press Conference
_______ Brochure
_______ Letterhead/logo
_______ Mailing to potential Sources
_______ Power point presentation
______Contacting current and potential funding sources
______Radio spot or announcement
______Slide show
______Pubic service announcement
______Video
______Other ___________________________

5. DO YOU CURRENTLY HAVE:

_______ Logo
_______ Letterhead
_______ Brochure
_______ Power Point Presentation
______Video
______Slide Show
______Poster

6. WHAT IS YOUR PROGRAM'S ATTITUDE TOWARDS PUBLIC RELATIONS?

Is it considered:____________Important ______Peripheral ______Unimportant?

7. Do YOU NEED TO IMPROVE:

_______ Funding Source Contacts
_______ Potential Funding Source Contacts
_______ Program Contacts
______Brochures or Printed Material
______Visual Materials
______Other
____

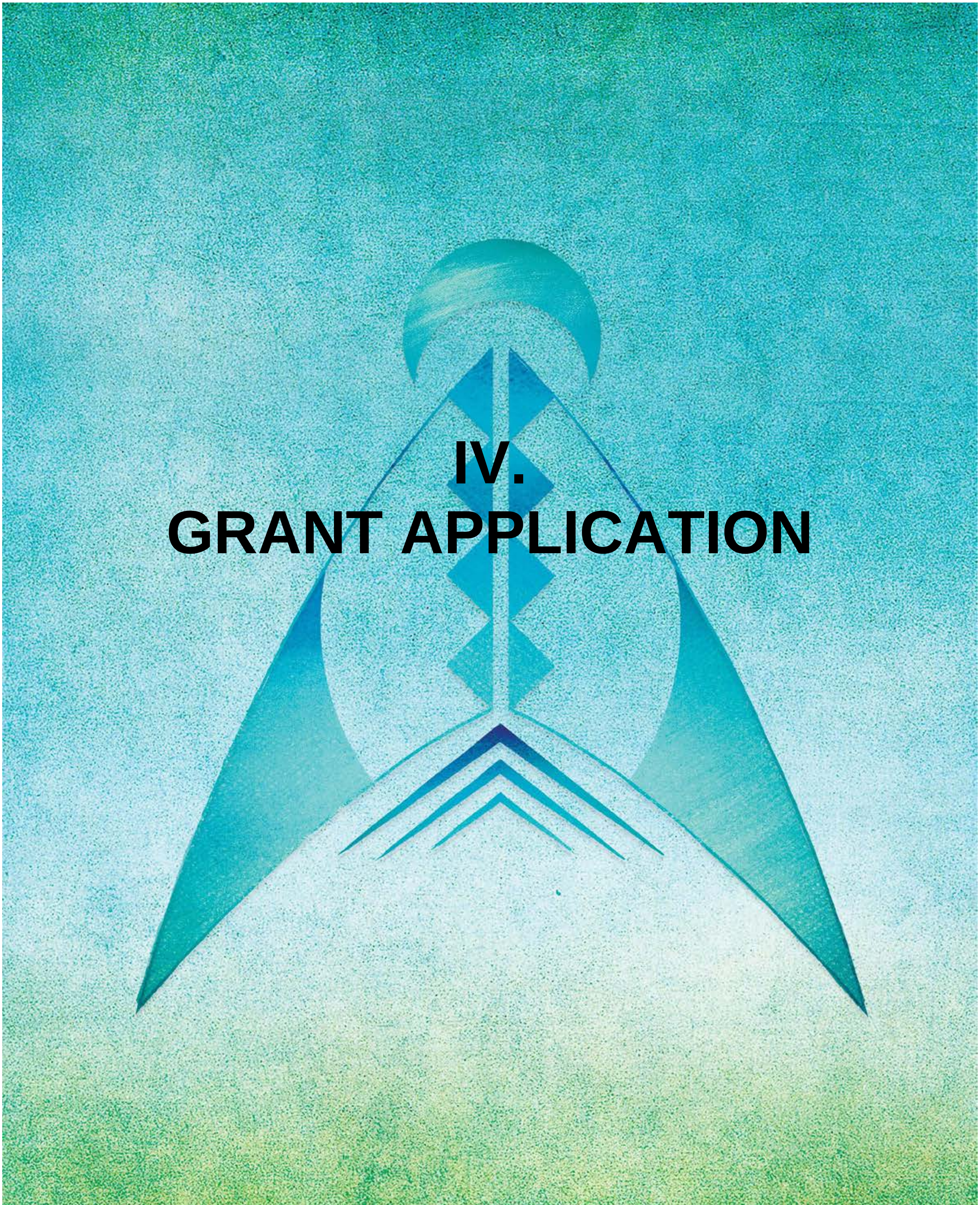
8. WHAT PROBLEMS TO YOU FACE IN YOUR PUBLIC RELATIONS?

9. WHAT IMPROVEMENTS WOULD YOU LIKE TO SEE IN YOUR PUBLIC RELATIONS?

DO YOU USE PUBLIC RELATIONS TO CULTIVATE CURRENT AND POTENTIAL FUNDERS?

AREA	YES	NO	SUGGESTIONS
1. Do you send clippings of articles about you with your proposal?			
2. Do you have brochures and other printed material that are the hallmarks of the program?			
3. Do any of your reports double as a sales-piece, showing how effectively your program and staff have worked?			
4. Do you use media exposure to build support for your program?			
5. Do you use media exposure to reinforce your resource development activities?			
6. Do you publicize new directions for your program, or new projects, so that funding sources are aware of your work?			
7. Do you ask for assistance, so that your funding sources feel that you need more help when you are facing special problems?			
8. Do you use Public Relations to make your issues and programs news and public knowledge--for your funding sources and the general public?			
9. Do you publicize the success of your staff and program so that you become identified with your successes?			

IV.
GRANT APPLICATION



TOOL: PRE-PROPOSAL APPROVAL FORM

PROPOSAL INFORMATION
GENERAL INFORMATION:
1. Department:
2. Brief description of the problem and proposed solution:
3. How does this project relate to the mission or goals of your Department?
4. Name of fundingagency:
5. Catalog of Federal Domestic Assistance Number (federal grants only):
6. Total estimated dollar cost of the proposed project (excluding consultant time): $
7. Matching or in-kind contribution required: $
8. Special clearances required (i.e. permits, environmental, etc.):
9. Describe any required collaboration with internal/external partners:

PRE-PROPOSAL APPROVAL FORM - Page 2

PROPOSAL INFORMATION

RESOURCES NEEDED (APPROXIMATELY)

8. Who do you plan to take the lead (act as the Proposal Development Supervisor) in preparing this proposal and grant application and who will serve as Proposal Development Supervisor?

Your Department? Yes___No____ ______________________________
Name

Grants/Contracts Office? Yes___No___
(If applicable)

Hire Outside Consultant? Yes___No___ ______________________________
Name

If planning to hire an outside consultant, provide an estimate the cost of the consultant's service:

12. Co-workers who will help with the project:

____

____

13. Attach signed letter from Department Director stating the above staff have adequate time available to conduct the project if funds are awarded

14. Estimated dates for proposal development process:

A. Proposal due date:

B. Submit proposal to Contract/Grants Officer for review:

C. Submit proposal to funder:

D. Project start-update:

ESTIMATE:	
Non-Personnel Resources Needed	
Travel	**$**
Supplies	**$**
Printing	**$**
Equipment	**$**
Other:	**$**
Space/facilities	**$**
Indirect	**$**
Project personnel needed (title/salary):	

PRE-PROPOSAL APPROVAL FORM - Page 3

Required Comments, Approvals, Signatures:

1. Reviewed by Department Director: Yes___ No___
Comments:

Signature:_______________________________Date: ____________

2. Finance Director Review: Yes___ No___
Comments:

Signature:_______________________________Date: ____________

3. Reviewed by Administration:

Approved________Denied__________
Reason for denial, ifapplicable:

Designated Proposal Development Supervisor:

Signature:_______________________________Date: ____________

EXAMPLE: PROPOSAL TEAM MEETING

SAMPLE AGENDA

I. Overview of Proposed Project

II. Funding Source

III. Proposal Components

IV. Delegation of Work Responsibilities

V. Establish Timeframes for Completion of Work Responsibilities

VI. Questions

TOOL: PROPOSAL DEVELOPMENT CALENDAR

Project:__________________________________Date Completed:____________________

Timeline for Completion

Required Grant Component	Person Responsible	WK 1	WK 2	WK 3	WK 4	WK 5	WK 6	WK 7	WK 8	Due Date
Program Components										
1. Statement of Problem and Need **2. Program Description** **3. Goals / Objectives** **4. Methods** **5. Timeline** **6. Evaluation** **7. Other**										
Financial Components										
1. Staff Pattern **2. Training** **3. Travel** **4. Contractual Needs** **5. Supplies and Equipment** **6. Office Space** **7. Indirect** **8. Other**										
Forms and Certifications										
1. Accounting Systems Cert. **2. Management Systems** **3. Tribal Resolutions** **4. Support Letters** **5. Resumes** **6. Clearances** **7. Other Documents**										

____
Department Director

____
Proposal Development Supervisor

TOOL: PROGRAM DESCRIPTION

Describe the Program:

Describe the Project:

TOOL: INTRODUCTION

1. Demographics of the Program ____

____

____

____

2. What are you most proud of in your program? ______________________________

____

____

____

3. What is your best service? ____

____

____

____

4. What agencies do you coordinate with? ____________________________________

____

____

____

____

5. What makes your program unique from other programs? _______________________

____

____

____

____

____

TOOL: PROBLEM STATEMENT

1. What is the problem?

2. What information can you use to support the problem?

3. What will be the result if the problem is not addressed?

TOOL: OBJECTIVE WORKSHEET

1. Activity: (Describe briefly theactivity)

2. Result: (Explain what change the activity willproduce)

3. Measure: (Describe what method will be used to determine if changeoccurred)

4. Standard (Define the level of success)

5. Beneficiaries (Who or what will benefit)

6. Write the objectives

TOOL: METHODS

ACTIVITIES	PURPOSE	TIMEFRAME Start	End	INDIVIDUAL RESPONSIBLE

TOOL: EVALUATION PLAN

1. Activity **Describe the activity you will be evaluating. (Describe your who, what, when, and where - the delivery structure you use to make your outcomes happen.)**	
2. Beneficiaries **Briefly describe the beneficiaries.**	
3. Desired Result **Explain what change will occur because of the described activity.**	
4. Indicators **Describe the concrete, observable thing you will look at to see whether your are making progress toward your desired result.**	
5. Method/Title of Measure **Describe the method you will use to determine if the described change occurs. Include the title of your instrument.**	
6. Standard of Success **Define a level of success you hope to achieve.**	
7. Respondents/Number of Measurements **Describe who will complete each instrument (include an estimate of the number). i.e. water quality tests, include an estimate of the number and frequency of measures to be taken.**	
8. Data Collection **Describe who will be collecting the data and how often data will be collected.**	
9. Data Aggregation **Describe who will be aggregating the data and how often data will be aggregated.**	
10. Data Analysis **Describe who will be analyzing the data and how often data will be analyzed.**	
11. Reporting **Describe who will write the report and how often the report is due.**	
12. Reporting Loop **Describe other forms of reporting evaluation information (newsletter, press release), who will write these reports, and how often it occurs.**	

TOOL: BUDGET PLANNING WORKSHEET

Name of the Project: ____

Scope of Work. ____

____

____

____

Staffing. Staff time required and list ITCA staff that will work on the project, if applicable.____

____

____

____

Travel. The number of trips, traveler destination, and duration. ____________________

____

____

____

____

Supplies. Any special supplies that will be needed; i.e. notebooks for training manual.

____

____

____

____

Project Specific Needs.

____

____

____

____

Date Proposal Is Being Mailed

TOOL: BUDGET DEVELOPMENT
WORKSHEET GO TO EXCEL FILE

TEMPLATE AND BUDGET DEVELOPMENT INSTRUCTIONS

Annual Budget and Budget Justification Development Templates, Helpful Hints

Most grant types only allow a maximum of 3 years per grant. However, there are projects for one or two years. Only use the templates for the number of years the grant allows and your project needs. You can delete the extra sheets.

1	**Budget Templates** The worksheet has five annual budget templates that contain formulas. There are also five annual budget justification templates five SF 424As. The Category/Item Description column will automatically populate with the data that is entered into the cells in the category column in the corresponding annual budget sheet. This assists with being consistent with terminology in the budget documents. You must verify that what you typing in the annual budget Category/Item Description column is the same as what is in the project narrative and OWP. The budget will automatically transfer to the SF 424A.
Hint	**Fill out the column B of each of the annual budget sheets before working on the justification sheets. Be sure to verify that what you typing in the annual budget Category/Item Description column (column B) is the same as what is in the project narrative and OWP.**
2	**Use Complete and AccurateCalculations** Gather all the necessary information you'll need prior to starting work on the budget (e.g., positions, wages, fringe calculations, supplies needed).
3	**Editing the Budget or Budget JustificationSheets** Remember there are formulas in the budget justification sheets that pull information from column B of the coressponding budget sheet. If you add or delete rows it may impact the corresponding sheet. If you delete a row in the budget make sure to delete the corresponding row in the budget justification. ● If you add a row in the budget you will have to add a row at the same position in the budget justification and copyformulas. ● To copy formulas select the cell in Column B directly above the new row. Highlight the formula and press ""ctrl"" key + ""C"" key. Now select the new cell in Column B and press ""ctrl"" key + ""V"" key. If the formula was copied correctly whatever you type in Column B in the annual budget sheet should appear in Column B of the corresponsding budget justification."
Hint	**Double check that numbers are added correctly as adding and deleting cells, rows or columns can create an error in the formulas in the worksheet.**

Tribe/Organization Name

BUDGET YEAR ONE

CATEGORY/ITEM DESCRIPTION	Federal Share	Non-Federal	Total
PERSONNEL	Full and Part time employees		
Insert title and percentage of time	-	-	-
Insert title and percentage of time	-	-	-
Insert title and percentage of time	-	-	-
Insert title and percentage of time	-	-	-
TOTAL PERSONNEL	**$ -**	**$ -**	**$ -**
FRINGE BENEFITS	Benefits for full and part-time employees, individual rate may		
FICA @ 7.65%	-	-	-
FUTA @ .00%	-	-	-
SUTA @ .00%	-	-	-
Health Insurance @ 00%	-	-	-
Retirement @ 00%	-	-	-
Workman's Comp. @ 00%	-	-	-
TOTAL FRINGE BENEFITS	**$ -**	**$ -**	**$ -**
TRAVEL	Employee/staff overnight travel only, not for local		
Insert any project staff travel	-	-	-
Insert any project staff travel	-	-	-
Insert any project staff travel	-	-	-
TOTAL TRAVEL	**$ -**	**$ -**	**$ -**
EQUIPMENT	Usable life of a year and unit capital cost in excess of $5,000		
Insert name of equipment	-	-	-
Insert name of equipment	-	-	-
TOTAL EQUIPMENT	**$ -**	**$ -**	**$ -**
SUPPLIES	Less than $5,000 per unit		
Insert name of type of supply	-	-	-
Insert name of type of supply	-	-	-
TOTAL SUPPLIES	**$ -**	**$ -**	**$ -**
CONTRACTUAL	Generally for contracts that require a formal bidding		
Insert name of type of contract	-	-	-
Insert name of type of contract	-	-	-
TOTAL CONTRACTUAL	**$ -**	**$ -**	**$ -**
OTHER	All other costs not list in categories		
Insert name of "Other" budget item	-	-	-
Insert name of "Other" budget item	-	-	-
Insert name of "Other" budget item	-	-	-
Insert name of "Other" budget item	-	-	-
Insert name of "Other" budget item	-	-	-
Insert name of "Other" budget item	-	-	-
Insert name of "Other" budget item	-	-	-
Insert name of "Other" budget item	-	-	-

Insert name of "Other" budget item	-	-	-
Insert name of "Other" budget item	-	-	-
Insert name of "Other" budget item	-	-	-
Insert name of "Other" budget item	-	-	-
Insert name of "Other" budget item	-	-	-
Insert name of "Other" budget item	-	-	-
Insert name of "Other" budget item	-	-	-
TOTAL OTHER	$ -	$ -	$ -
DIRECT COST TOTAL	$ -	$ -	$ -
INDIRECT COST @ XX.XX% (if applicable)	$ -	$ -	$ -
TOTAL PROJECT COST YEAR 1	$ -	$ -	$ -
Required Non-Federal Share	-	$ -	

It is strongly recommended that you don't exceed the required match amount in any project year.

Tribe/Organization Name

BUDGET JUSTIFICATION YEAR ONE

CATEGORY/ITEM DESCRIPTION	Federal	Non-Federal	CALCULATION AND JUSTIFICATION
PERSONNEL	$ -	$ -	Explain calculation of salary for each position and position project responsibility
Insert title and percentage of time	*Describe salary calculation and project responsiblities*		
Insert title and percentage of time	*Describe salary calculation and project responsiblities*		
Insert title and percentage of time	*Describe salary calculation and project responsiblities*		
Insert title and percentage of time	*Describe salary calculation and project responsiblities*		
FRINGE BENEFITS	$ -	$ -	Describe the benefits given and differences based on type of
FICA @ 7.65%	*Describe the benefit and who is entitled to receive the benefit*		
FUTA @ .00%	*Describe the benefit and who is entitled to receive the benefit*		
SUTA @ .00%	*Describe the benefit and who is entitled to receive the benefit*		
Health Insurance @ 00%	*Describe the benefit and who is entitled to receive the benefit*		
Retirement @ 00%	*Describe the benefit and who is entitled to receive the benefit*		
Workman's Comp. @ 00%	*Describe the benefit and who is entitled to receive the benefit*		
TRAVEL	$ -	$ -	Describe employee travel
Post Award Training - 2 people	*Describe need for project completion and break out individual travel costs*		
ANA Grantee Meeting - 2 people	*Describe need for project completion and break out individual travel costs*		
Insert any project staff travel	*Describe need for project completion and break out individual travel costs*		
EQUIPMENT	$ -	$ -	Describe equipment and need by project
Insert name of equipment	*Describe why the project needs this equipment*		
Insert name of equipment	*Describe why the project needs this equipment*		
SUPPLIES	$ -	$ -	Describe supplies to be purchase and need by project
Insert name of type of supply	*Describe supplies to be purchased and need by project*		
Insert name of type of supply	*Describe supplies to be purchased and need by project*		
CONTRACTUAL	$ -	$ -	For large contract item not for lesser professional
Insert name of type of contract	*Describe cost calculation and why project needs this contractor*		
Insert name of type of contract	*Describe cost calculation and why project needs this contractor*		
OTHER	$ -	$ -	Describe calculation of cost and why the item is
Insert name of "Other" budget item	*Describe how the cost was determined and why the item is needed for the project*		
Insert name of "Other" budget item	*Describe how the cost was determined and why the item is needed for the project*		
Insert name of "Other" budget item	*Describe how the cost was determined and why the item is needed for the project*		
Insert name of "Other" budget item	*Describe how the cost was determined and why the item is needed for the project*		
Insert name of "Other" budget item	*Describe how the cost was determined and why the item is needed for the project*		
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Insert name of "Other" budget item	*Describe how the cost was determined and why the item is needed for the project*		
Insert name of "Other" budget item	*Describe how the cost was determined and why the item is needed for the project*		
Insert name of "Other" budget item	*Describe how the cost was determined and why the item is needed for the project*		
TOTAL OTHER	*Describe how the cost was determined and why the item is needed for the project*		
INDIRECT COST @ XX.XX% (if	$ -	$ -	*Describe how the cost was determined and why the item is needed for the project*

BUDGET INFORMATION - Non-Construction Programs

SECTION A - BUDGET SUMMARY

Grant Program Function or Activity	Catalog of Federal Domestic Assistance Number	Estimated Unobligated Funds		New or Revised Budget		
		Federa	Non-Federal	Federa	Non-Federal	Total
(a)	(b)	(c)	(d)	(e)	(f)	(g)
1.				$0		$0
2.					$0	$0
3.						$0
4.						$0
5. Totals		$0	$0	$0	$0	$0

SECTION B - BUDGET CATEGORIES

6. Object Class Categories	GRANT PROGRAM, FUNCTION OR ACTIVITY				Total
	Federa (1)	Non-Federal (2)	(3)	(4)	(5)
a. Personnel	$0	$0			$0
b. Fringe Benefits	$0	$0			$0
c. Travel	$0	$0			$0
d. Equipment	$0	$0			$0
e. Supplies	$0	$0			$0
f. Contractual	$0	$0			$0
g. Construction	$0	$0			$0
h. Other	$0	$0			$0
i. Total Direct Charges (sum of 6a-	$0	$0			$0
j. Indirect Charges	$0	$0			$0
k. TOTALS (sum of 6i and 6j)	$0	$0			$0

7. Program Income					$0

SECTION C - NON-FEDERAL RESOURCES

	(a) Grant Program	(b) Applicant	(c) State	(d) Other Sources	Total
8.					$0
9.					$0
10.					$0
11.					$0
12.	TOTAL (sum of 8-11)	$0	$0	$0	$0

SECTION D - FORECASTED CASH NEEDS

		Total for 1st Year	1st Quarter	2nd Quarter	3rd Quarter	4th Quarter
13.	Federal	$0	$0	$0	$0	$0
14.	Non-Federal	$0	$0	$0	$0	$0
15.	TOTAL (sum of lines 13 and 14)	$0	$0	$0	$0	$0

SECTION E - BUGET ESTIMATES OF FEDERAL FUNDS NEEDED FOR BALANCE OF THE PROJECT

	(a) Grant Program	FUTURE FUNDING PERIODS			
		(b) First	(c) Second	(d) Third	(e)
16.		$0	$0		
17.					
18.					
19.					
20.	TOTAL (sum of lines 16 - 19)	$0	$0	$0	$0

SECTION F - OTHER BUDGET

21.	Direct Charges:		22. Indirect Charges	
23.	Remarks:			

PROPOSAL EVALUATION FORM

Evaluation Area	Rating: A =Good B =Acceptable C =Poor	Comments and suggested improvement
Title		
Writing Style (Readability)		
Appropriate Tone		
Summary (Succinct & Motivating)		
Documentation of Need		
Establishment of Track Record		
Explanation of Method		
Objectives - specific/measurable		
Staff Credentials/ Organization Resources		
Evaluation Design		
Future Funding Plans		
Budget thorough		

PROPOSAL EVALUATION FORM (cont'd)

Evaluation Area	**Rating:** **A =Good** **B =Acceptable** **C =Poor**	**Comments and suggested improvement**
Budget – clear		
Budget -- all items justified		
Appendixes		
Logical Flow Between Parts of Proposal		
Visual Attractiveness		

Omissions/Unnecessary Inclusions in this proposal:	Things that should have been emphasized more in this proposal:

V.
AFTER THE GRANT IS SUBMITTED

TOOL: FOLLOW-UP ACTIVITY WORKSHEET

Project Title: ____________________

Grantmaker:____________________ Date: ______________

Check-In Dialogue:

Did you receive the information? Yes_______ No _____

Do you have any questions?

Follow-up Questions for Grantmaking Decision Process:

Who is involved in reviewing the proposal?

What is the timetable?

When will first-cut applicants be notified?

Will visits be scheduled? Yes_______ No _______

If yes in office or on site?

When and how will grantees be notified?

TOOL: FOLLOW-UP TASKS

Who should be recruited to help promote proposals?

How and when to recruit?

What information is needed to advocate effectively?

How can stakeholders be motivated?

What do you hope for them to accomplish?

TOOL: REPORT REVIEW

REVIEW	YES	NO
Does your report restate the objectives of your program?		
To determine if your report describes progress towards achieving your objectives during this reporting period, answer the following questions		
Does your report describe your activity?		
Does your report describe your beneficiaries?		
Does your report describe the number of people served?		
Does your report describe your desired results of the program?		
Does your report describe the indicators you used to measure your desired results?		
To determine if your report notes evaluation activities, in which your program has engaged, answer the following questions		
Does your report describe how your measured your desired result?		
Does your report describe who administered the instruments?		
Does your report describe who completed the instruments?		
To determine if your report describes relevant evaluation data, answer the following questions		
Does your report describe the results of the analysis of the evaluation data? (Results relate to the standards set in your objectives and includes statistics and qualitative information.)		
Does your report describe stories that illustrate the statistics or qualitative information?		
Does your report compare the results of your evaluation with the standards set in your objectives?		
Does your report state ideas for improvement or any next steps?		

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