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ABSTRACT

This book is written for the parks and recreation practitioner and the municpal manager who has the overall responsibility for program operations and for preparing proposals for external funding. The marketing plan targets such groups as the municipal director of parks and recreation, city managers, outdoor recreation specialists, and nature center directors. Subjects discussed include locating funding sources, applying for funding, writing the proposal, submitting the proposal, and administering the project. Sample grant applications and a list of state liaison officers for land and water conservation fund monies are appended. (JD)

ABC's of Grantsmanship

S. Harold Smith
Daniel D. McLean

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A project of the
American Association for Leisure
And Recreation

An association of the
American Alliance for Health, Physical
Education, Recreation, and Dance

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Purposes of the American Alliance for Health, Physical Education, Recreation, and Dance

The American Alliance is an educational organization, structured for the purposes of supporting, encouraging, and providing assistance to member groups and their personnel throughout the nation as they seek to initiate, develop, and conduct programs in health, leisure, and movement-related activities for the enrichment of human life.

Alliance objectives include:

1. Professional growth and development—to support, encourage, and provide guidance in the development and conduct of programs in health, leisure, and movement-related activities which are based on the needs, interests, and inherent capacities of the individual in today's society.

2. Communication—to facilitate public and professional understanding and appreciation of the importance and value of health, leisure, and movement-related activities as they contribute toward human well-being.

3. Research—to encourage and facilitate research which will enrich the depth and scope of health, leisure, and movement-related activities; and to disseminate the findings to the profession and other interested and concerned publics.

4. Standards and guidelines—to further the continuous development and evaluation of standards within the profession for personnel and programs in health, leisure, and movement-related activities.

5. Public affairs—to coordinate and administer a planned program of professional, public, and governmental relations that will improve education in areas of health, leisure, and movement-related activities.

6. To conduct such other activities as shall be approved by the Board of Governors and the Alliance Assembly, provided that the Alliance shall not engage in any activity which would be inconsistent with the status of an educational and charitable organization as defined in Section 501(c)(3) of the Internal Revenue Code of 1954 or any successor provision thereto, and none of the said purposes shall at any time be deemed or construed to be purposes other than the public benefit purposes and objectives consistent with such educational and charitable status.

Bylaws, Article III

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Introduction:

Six Steps to Successful Grantsmanship

With tight budgets and a continued need for strict financial accountability, many public and most private human service agencies are searching to identify external funding sources to assist in the provision of their programs and the development of their facilities. Grantsmanship is the systematic development of these external resources from the formulation of the initial idea through the administration of the project when sponsored. Although the process may appear complex to the beginning grant writer, it is really quite simple when one is initiated to the mechanics and process of grant development. The seasoned grant writer also understands that the same process and mechanics are used in applying for money or any other type of resource such as land, building materials, volunteer labor, or other valuable resources.

The purpose of this book is to help all human service personnel, but specifically the leisure services professional, to understand the process of grantsmanship and gain the confidence to give grantsmanship a try. It is important to point out that although the examples used in the book relate mainly to leisure, parks, and/or recreation, the application of the concepts work equally as well in education, health, or social services settings. For this reason the approach is a simple one, thus the name: *ABC's Of Grantsmanship*.

Six Steps to Successful Grantsmanship

Grantsmanship is a skill *and* an art This chapter presents the six steps of successful grantsmanship, the major components of a grant proposal, a decision-making tree for seeking grants, and suggestions on how to make a grant proposal competitive. Each of the areas discussed serves as an introduction for information that will be developed in more detail later in the text. This chapter also provides an overview and starting point for the beginning grant writer.

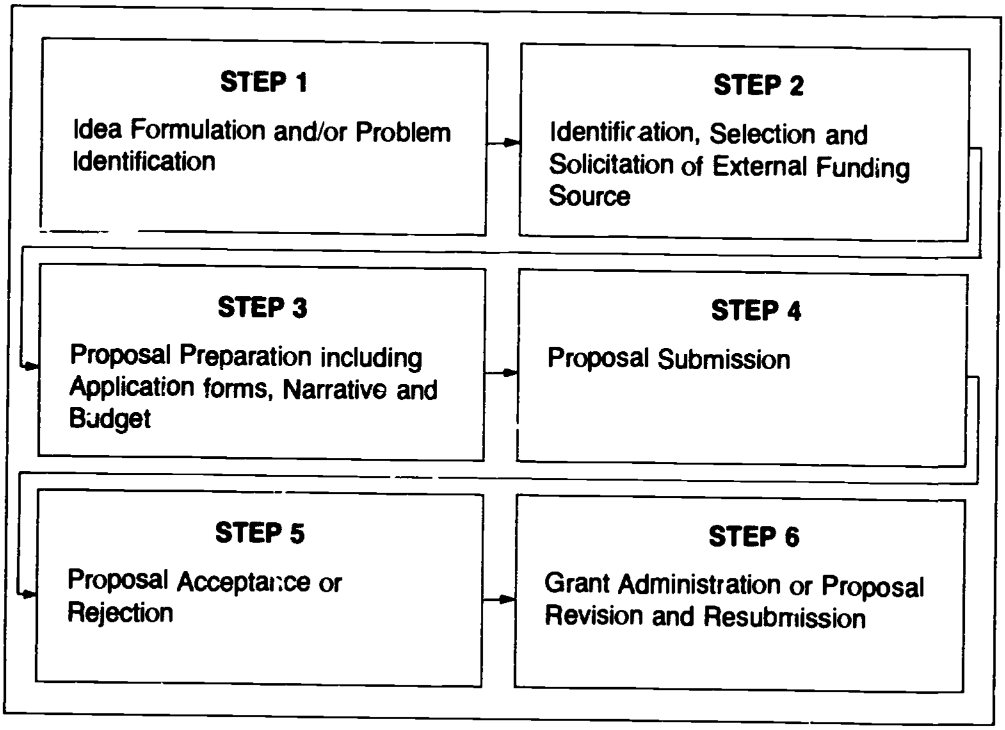
The grantsmanship process flows through six interrelated steps. Successful completion of each step leads naturally to the next succeeding step. This natural flow process is depicted in Figure 1. Succeeding chapters will discuss each of these major steps in some detail.

Proposal Components

Generally all proposals submitted, whether large or small, should include a discussion of each of the major proposal components. Each of these major components are introduced in Table 1.

In most cases external funding sources provide an application packet that will ask questions covering each of these major component areas. When this is the case,

Figure 1. Grantsmanship Process Flow Chart.



follow these directions and answer the questions in detail. In those cases where a formal application packet is not required or when the majority of the proposal is written before the external funding source is identified, addressing each of these component areas will assure a complete grant proposal. A detailed discussion of each of these component areas is provided in a later chapter.

Questions To Be Asked

As the grantsmanship experience is started there are three or four questions that need to be answered before actually beginning the proposal. Answering these questions at the very beginning of the process will save you much time, effort and frustration later on.

1. Are the chances of your proposal being funded good enough to be worth your time and effort?

Although you may not really know what your chances are, you should be aware that the great majority of proposals are not accepted the first or second time around. It is estimated, for example, that seventy-five percent of governmental grant proposals submitted are rejected on their first submission. This is not hard

Table 1. Major Components of a Grant Proposal.

	Component Area	*Component Specifics*
I.	Abstract and Budget Summary	A. one page introduction to project B. summary of budget expectations
II.	Introduction	A. who you are as a submitting agency B. submitting agency experiences, accomplishments and support C. establish program and financial credibility
III.	Problem/Need Statement	A. data to identify and clarify problem/need B. why your project C. reasons why you should be funded
IV.	Objectives	A. stated in relation to problem/need B. stated in performance terms, are specific, time oriented and measurable C. process oriented
V.	Methods	A. product or outcomes oriented B. plan of action C. program design, interrelationship of project components D. identifiable "deliverables"
VI.	Evaluation	A. process oriented B. product oriented C. external review D. internal review
VII.	Budget	A. honest and realistic B. each component identified by line item C. identification of matching funds and local contributions D. no surprises or secrets E. within limits set by external funding source
VIII.	Summary	A. one page in length B. identification of submitting agency C. states submitting agency credibility D. states problem/need E. gives project objectives and activities F. gives project costs
IX.	Appendix	A. letters of support B. personnel vitae/resume C. program brochure D. reports, data and documents E. job descriptions

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to understand when one realizes that for every grant proposal accepted, there may be as many as thirty other proposals submitted. Once a grant award is given, however, the chances of renewing the grant or obtaining another one greatly incr ases—some say as much as eighty percent.

It takes ti and effort to complete and submit a grant proposal and you should do a" n to determine the benefit/cost relationship before you start. If, for examp , it will cost you and/or your agency $900 in time, manpower, and expense to prepare an application for a $1,000 grant, you need to give serious consideration to the overall worth of the grant to you if awarded.

2. Is your grant proposal in harmony with your personal and professional goals, and does it meet the philosophy and goals of your agency?

You will be giving a part of yourself and your agency to the grant, both in the writing and submission of the application, and the administration of the project if awarded. If you personally are not committed to the project or if the project does not readily fit into your agency goals, the entire effort can quickly become a personal and professional burden.

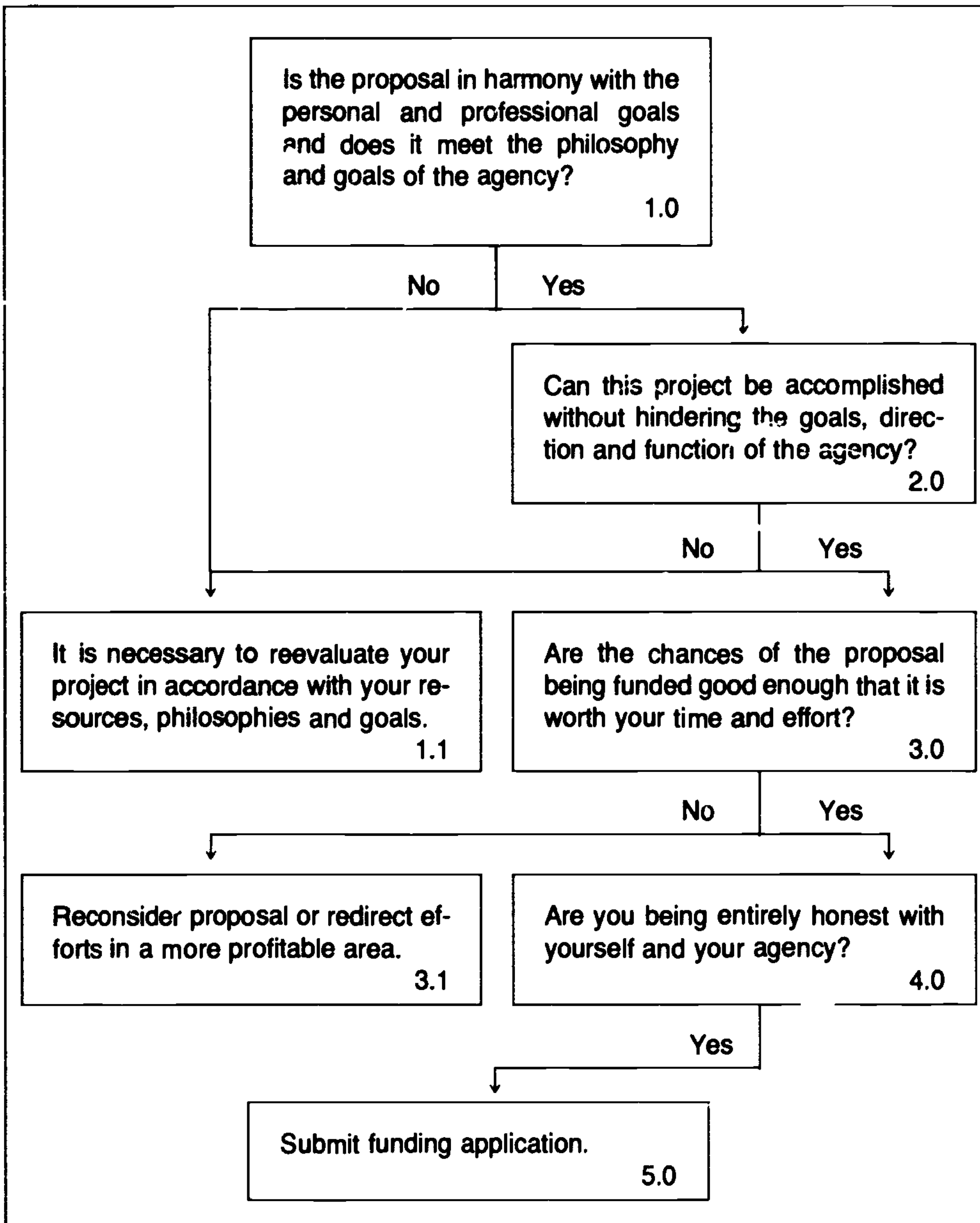
3. Can this project be accomplished without hindering the goals, direction, and function of the agency?

In some situations money and/or resources may be available to you that, if awarded, will change the direction of what you are doing. If this is what you want to do then these resources may be of great benefit in assisting with this change process. In some cases, however, the expectations of the external funding agency may be in complete disharmony with what it is you are doing, and would jeopardize your basic mission if awarded. You are the only one who can effectively assess your situation. You must be careful.

4. Why are you undertaking this adventure? Are you being honest and realistic with yourself and your agency?

Sometimes the best dreams can become the greatest nightmares. You must be totally honest with yourself and your agency when deciding whether you can really accomplish the objectives and activities of your project. Is the problem you seem to be facing real or is it only perceived? Many times it is felt that receiving a grant award will solve all of your problems, when in fact it may only compound them. Because of the time, effort, and commitment involved in the preparation and submission of a good grant proposal, you must always be completely honest and realistic in your decision-making process. Figure 2 provides a decision tree that should help as you consider this process.

Figure 2. Decision Tree for Grant Pre-Assessment.



Making Your Proposal Competitive

The following questions are provided as guidelines that will help make your proposal more competitive and your preparation task easier. Successful grant writers soon learn to use their own style and approach while incorporating these ideas in their grant writing.

1. Have you followed the questions carefully, addressed every criteria, answered every question and given it a thorough review?

2. Is your proposal neat, clean and readable?

3. Have all of the forms been completed in detail?

4. Have you included pictures, brochures, statistics and support letters?

5. Have you made the proposal skimmable (readable) using an outline form with underlining, section titles, short paragraphs and emphasis points?

6. Have you identified joint use or multiple-use arrangements including volunteers, facility and equipment sharing, and agency sponsorships?

7. Are you aware of key words, target populations and identifiable phrases appropriate to your grant reviewer and have you used them effectively in your presentation?

8. Have you been honest in your presentation? Did you start with the important parts and avoided unsupported statements?

9. Is your proposal as short and simple as possible?

10. Have you met all your deadlines?

11. Have you been *positive*?

Summary

In summary, grantsmanship is a six step process that can be followed in an easy, systematic pattern. The six steps are: idea formulation; identification of external funding sources; proposal preparation; proposal submission; proposal acceptance or rejection; and grant administration or proposal revision and resubmission. The successful grant writer follows a basic outline in the development of the proposal that includes these main component areas: abstract and budget summary; introduction; problem/needs statement; objectives; methods; evaluation; budget; summary; and appendix. The use of these general guidelines also will help in making a proposal more competitive:

1. People give to people. Personal contact greatly increases your potential for success.

2. Grantsmanship is an art that is learned, not a science to be mastered

3. The first and best place to look for external funding support is close to home.

4. Grantsmanship begins with a good idea.

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CHAPTER

Steps One and Two:

Idea Formulation And Selection of External Funding Source

Idea Formulation/Abstract

Most individuals or agencies that are seeking external fund support have already identified a need or developed an idea that would best be met by seeking external support. In many cases, however, this need or idea is in the mind of the key individual(s) involved, and not down on paper. Since it is difficult to read a person's mind, it is a good practice to write a short abstract of your need/idea for funding that can be used as a focal point as you search for a potential external funding source. This abstract can also be shared with colleagues and agency staff to obtain additional input, clarification, and support. It should also be submitted to potential external funding sources for their review as they are identified. The abstract need not be any longer than two or three paragraphs and generally should be no longer than one typewritten page. The abstract should address the following characteristics of a fundable project.

1. The proposal is new, innovative, and applies directly to your situation.

2. The proposal has the potential of being cost effective and management efficient.

3. Matching funds and local support are evident in the project and the potential for long term support is high.

4. There is documentation of a clear need.

5. The time is right for this project.

A sample abstract is shown in Figure 3.

Budget Summary

Along with the abstract, a short budget summary indicating the projected cost of the principle components of the project should be developed. Since you do not yet know the amount of possible funding from an external funding source, it is best to realistically project the cost of each of the main budget areas. Reviewing these potential costs of your project will also help you clarify the financial reality of your idea. The budget summary should follow the format shown in Figure 4.

In some cases, external funding sources will provide monies for the development of capital expenditures as well. If this is the case, then your budget summary should include this as a separate line item area added to the format given in Figure 4.

Figure 3. Sample Abstract.

> Operation Lifeline is a community-based program of St. Elizabeth Medical Center (SEMC). The purpose of this program is to provide a personal emergency response system which allows frail, elderly, and disabled individuals in Yakima County to remain living independently in their own homes despite advanced age, chronic medical problems, or social isolation.
>
> For the past three years SEMC has sponsored the Operation Lifeline Program with initial funds from hospital guilds, civic and social organizations, and private donations. Through the provision of a telephone emergency alarm and response system, the program currently provides 54 individuals with a constant button which can be carried about, or if the individual shows unusual inactivity, the Lifeline system will automatically call for help to the 24-hour response base unit located in the SEMC Emergency Department.
>
> At present levels, this emergency response system can only service a small fraction of eligible subscribers in Yakima County while a waiting list continues to grow. The number of applications for the Lifeline Service would be expected to increase greatly if publicity efforts are stepped up or if social service agencies were invited to refer their claims.
>
> The St. Elizabeth Health Foundation is seeking funds to expand the Operation Lifeline Service so that the waiting list of eligible subscribers may be dissolved. We are asking the Foundation for $25,000 to provide the ongoing financial support necessary to operate and expand the program. This fund request will enable SEMC to meet a greater percentage of the need that is evident in the Yakima community. Specific funding includes the purchase of 30 additional Lifeline Units, one part-time personnel position to keep up with the expansion demands, and operational costs not covered by the $8.00 monthly subscriber fees.

With a completed project abstract and budget summary, you are now ready to begin the search for the most appropriate external funding source for your project. Depending on the amount of external funds desired and/or the complexity of your project, you may need to identify more than one potential external funding source. A discussion of the implications of sending the summary of the project proposal to more than one potential external funding source is discussed in a succeeding chapter.

Selecting An External Funding Source

You are now ready to begin the search for an external funding source. In general, there are three types of external funding sources; Federal and State Governments, Public and Private Foundations, and Corporations. A brief overview of the pros and cons of each of these potential external funding sources is found in Table 2.

Figure 4. Sample Budget Summary Form.

	Total Requested	Total Donated	Total Project
A. *Direct Costs*			
1. Personnel Costs			
A. salaries & wages	$______	______	______
B. fringe benefits	______	______	______
C. consultants & contract services	______	______	______
Subtotal	$______	______	______
2. Non-Personnel Costs			
A. office rental	$______	______	______
B. equipment costs	______	______	______
C. maintenance costs	______	______	______
D. consumable supplies	______	______	______
E. travel	______	______	______
F. telephone	______	______	______
G. other	______	______	______
Subtotal	$______	______	______
B. *Indirect Costs* (Agency overhead, usually a negotiated % of total direct costs)	$______	______	______
Total Projected Costs	$______	______	______

Federal and State Government

Although not the "sugar daddy" of the 1960's and 1970's, federal and state government continue to be the largest combined source of external fund support. Some experts go as far as to say that federal and state government "out give" foundations and corporations by as much as 80–90 times. The primary reason for this difference is that government provides support in a tremendously wide range of areas. Today's grants from government sources tend to be for a one-year project period with possibilities of renewal or continuation for up to three years if succeeding funding is received. Project grant awards are generally in the $50,000 to $100,000 range per project year. Government grants are very competitive, with several hundred applications typically being received for 15 to 25 potential grant awards given. Because of this ratio, as many as 80% of initial grant applications to government sources are rejected. Once a governmental grant is obtained, however, there is usually an excellent chance of receiving additional funds in the future. Another serious consideration with government grants is that the red tape and application requirements are much greater than with most other types of external funding sources.

Government Source Listing. Publications are available that list the wide array of potential governmental funding sources. It should be noted that reviewing these resource listings is a tedious task because of the volumes of materials provided. The task may be simplified by acquiring the "Requests for Proposals" (RFP's) that most government sources typically send to local agencies serving clientele related to the proposed requirements.

The primary government resource listings are:

- *Catalog of Federal Domestic Assistance*
- *Commerce Business Daily*
- *Federal Grants and Contracts Weekly*
- *Federal Grants Reporter*
- *Federal Register*
- *The Guide to Federal Assistance for Education*
- *United States Government Manual*

Ordering information for each of these resources is found in Table 3.

You should be aware that most of these publications are very detailed and will take considerable time to review for specifics. The following suggestions will aid you in the effective use of these resources.

1. *Using the catalogs and guides.*

   A. Use the indices to locate general information areas. They will provide, for example, different types of funding sources such as recreation, human services, capital funds, and so on.

   B. Examine the selected area thoroughly. It is important to identify key words and/or populations. Use these key words to cross reference and expand the list of potential funding sources.

   C. Recognize the limitations of the publication. Most publications identify the sources they draw upon. As several of these sources are reviewed it will become apparent that each publication

Table 2. Comparison of External Funding Sources

Pros	Cons
Foundation Grants	
1. Once funded, second funding becomes much easier.	1. Competition very high for foundation dollars.
2. Foundations are often tailored to specific giving.	2. The time invested in proposal preparation may have a low payback.
3. Local foundations can be very supportive of local organizations.	3. It is very time consuming to seek out foundations that match your agencies needs.
Corporations	
1. Potential for monies is high.	1. Requires a significant amount of time to make contacts.
2. Local small corporations can be big supporters.	2. May require tailoring proposal to potential grant provider.
3. Corporations seeking tax breaks.	3. May need to establish a not-for-profit-foundation to receive donations.
4. Programs which enhance images are particularly attractive.	
5. Small corporations can be major givers.	
Federal and State Government	
1. Large amount of funds available.	1. Competition very high for grant dollars.
2. Wide variety of funding areas.	2. Extensive detail expected in application process.
3. Multi-year funding possible.	3. Much red tape.
4. Once funded, second funding becomes much easier.	4. Very political.

draws from a variety of resource information. As you become familiar with the catalogs and guides some will be more helpful than others.

D. Follow up each possible funding source with a personal contact.

2. *Using the* Federal Register *to obtain information pertaining to grants.*

A. Begin by locating the notice of intent. This provides a list of proposed Requests For Proposals (RFP) that the federal government will be seeking.

B. The *Federal Register* should be used to identify proposed rules and definition of terms that are important in preparation of proposals.

C. The *Federal Register* identifies final regulations used in submission of proposals.

3. *Using the* Commerce Business Daily *to obtain announcements pertaining to potential government contracts.*

A. The *Commerce Business Daily* lists RFP's called by the government. It lists the agency, types of proposal, name of contact officer, and telephone number.

B. The *Commerce Business Daily* lists a request for statement of capability.

C. The *Commerce Business Daily* lists a notice of sole source negotiations.

Once a potential governmental funding source is located, it will help to make contact with the governmental agency or program involved to obtain additional information and clarification. This contact should be in person if the agency office is conveniently located to you or by letter or telephone if some distance away. Contact should be made with the Project Contact Officer that is listed in the resource information. It is the project contact officer's job to provide you with information regarding this funding area so don't hesitate to make contact with them. Some reasons that you will want to contact this officer are:

1. to obtain clarification on the information provided in the written guidelines;

2. to obtain advanced notice of new programs, proposal deadlines, the availability of new information, or future directions of this program;

3. to help establish your credibility;

4. to further assess the funding potential of your project.

Typical information that you can expect to receive from the project contact officer would be:

1. information on future directions and interests of the funding agency;

2. estimates of future deadlines not yet officially established;

3. the latest information about the particular program for which you are applying;

4. clarification of information provided in proposal guidelines including criteria used in the review process;

5. reactions to specific proposal ideas;

6. information on the clearinghouse review procedures and management circulars that pertain to this program;

7. the ratio of projects funded to proposals received in previous grant years;

8. agency personnel's estimate of the ratio indicated for projects funded to proposals received for the current grant year;

9. the range and average dollar amounts of past proposals and estimates of such amounts for upcoming proposal solicitations;

10. lists of projects funded in previous years;

11. detailed information on previously funded projects;

12. the type of people who will constitute the proposal review panel;

13. the overall goals of the agency and any particular mandates they may have received from Congress;

14. position statements and written statements of future program plans.

Upon receiving your call or letter, the project contact officer will send you an application packet for the grant area for which you have an interest. This packet will contain all of the necessary forms and directions you will need to apply for this grant. It is very important that you read these application materials very carefully and follow the instructions and timelines precisely. If you do not, you will be immediately eliminated from consideration for a grant award.

Foundations

Foundations are not-for-profit organizations that provide external funding support in specifically identified areas that are selected by the foundation board of directors or benefactors. Locating promising foundations may require considerable time and research because of the large number of foundations in the United States and because each foundation has its own interest area(s) in giving. Generally speaking, foundations are identified in the following manner.

1. *Public Foundations*

   A. Large—those foundations generally having assets of $1,000,000 or more. They usually are national in terms of geographic area served, have broad interest areas, have a professional staff, and have a high ratio of proposals received to proposals awarded.

   B. Small—those foundations generally having assets of less than $1,000,000. They usually limit their geographic area of service, tend to have limited areas of interest, and are often family oriented.

2. *Private Foundations*
   Those foundations typically having interests directly related to a company interest, employee interest, or private interest. Generally speaking, they are very limited in geographical area served and have relatively small assets when compared to large foundations.

3. *Community Foundations*
   Those foundations that carry the name of a community or geographical area. They are limited to the geographical area identified and usually have very limited assets.

Foundation Source Listing. The following resources are available in trying to identify potential foundations to provide external support.

1. The Grantsmanship Center.

2. The Foundation Center.
   - *The Foundation Directory.*
   - *The Foundation Grants Index.*
   - *The Foundation National Data Book.*
   - *The Foundation News*
   - *The Foundation Source Book.*
   - *The Foundation Source Book Profiles.*

3. *Directory of Research Grants*

4. IRS tax returns

5. State guides/directories for foundations and charitable trusts.

Ordering information for each of these resources is found in Table 3.

Most of these resources are quite expensive and their value to any particular agency varies greatly. In some cases the resource may be very helpful in others it may not. For this reason it would be wise to review each resource carefully before a decision to purchase is made. Most public libraries in large cities and the research libraries in many colleges and universities will also have these resources available for reference use.

The Foundation Directory is probably the single best resource in identifying the major foundations. It provides the following information on all of the large foundations in the country:

1. Location including address.

2. Important people including names of trustees, officers, donor, and contact officer.

3. Purposes including current activities, interests, and special limitations.

4. Financial status including expenditures, assets, income, number and amounts of grants awarded.

5. Geographic location served.

Contacting the Foundation. Once you have identified a foundation that you feel may be interested in your proposal, you must make personal contact with them. In most cases this first contact is made by submitting a letter of inquiry to the foundation contact officer explaining your interest in their foundation and asking for additional information from them. This letter of inquiry should always be typed on your agency letterhead and should be brief and to the point. Along with the letter of inquiry you should also submit a typed copy of your proposal abstract and budget summary. With this initial information, the foundation can respond indicating whether your proposal appears to meet their foundation guidelines and limitations. A sample letter of inquiry is proivded for your review in Sample 1.

Sample 1. Sample Letter of Inquiry

July 26, 1986

James P. Shannon, Executive Director
General Mills Foundation
P.O. Box 1113
Minneapolis, MN 55440

Dear Mr. Shannon,

It is our understanding that the General Mills Foundation supports projects in the area of scholarships for students in nutrition and wellness. Enclosed is an abstract and budget summary of a project that the Washington Recreation and Park Association would like to undertake in this area.

May we ask that you review these materials and evaluate whether they meet your guidelines and standards. If upon review you feel that our project has a potential for receiving support from your foundation, would you please send the necessary application materials for support consideration to us.

Thank you for your time and effort in our behalf. We look forward to hearing from you in the near future.

Sincerely,

Jane S. Johnson
Executive Director
(206) 786-1212

enclosure

Once you have received a positive response from the foundation, you should set up either a personal or telephone interview with the foundation contact officer. It is much better to have a personal interview, but if time or distance makes this unreasonable, a telephone interview is an acceptable substitute. Having personal contact with the foundation is very important in establishing your credibility. Some other reasons why this interview is important are:

1. it gives you an opportunity to sell yourself, your agency and your idea;

2. to establish a relationship with the foundation;

3. to obtain information on the particular interests of the foundation;

4. to assess the funding potential of your idea and to receive additional suggestions.

In setting up this interview, the following items should be remembered:

1. Be positive, convincing and enthusiastic, but not pushy.

2. Use the name of a well-known person from your agency, if possible, to help establish your credibility.

3. Prepare for a short 15–30 minute meeting, keeping your presentation short and simple.

4. Have a number of questions ready to ask during the interview but also be prepared to answer questions about your proposal.

5. *Be prepared!*

Remember that this is an information gathering opportunity to help you develop and focus your actual proposal to meet the requirements of the selected foundation.

Corporations

Any for-profit business or corporation may give a donation to a not-for-profit organization through the use of the IRS 501–3C or C4 tatus. It may be that you as a public agency should establish your own not-for-profit foundation so that you can be eligible for these types of donations. The procedures for establishing a not-for-profit organization can easily be obtained by contacting the Secretary of State office in your state and by submitting the necessary paper work to the IRS. Under current tax laws, for-profit organizations may give up to five percent of their pretax income to not-for-profit organizations. The current national average for giving of this type is only about one percent, thus leaving the potential of another four percent. To better understand the potential of this area, reports show that in the years of 1983 and 1984, for-profit corporations gave more money to not-for-profit organizations than did foundations, a total donation volume of $3.4 billion. In 1985, recreation-oriented sponsorship of this type across the nation included nearly 2,000 separate corporations that gave over $850 million as program sponsors. These figures have the potential of being expanded by 400%.

Finding a Corporation. The single best resource to corporations involved in this type of giving is the *Special Events Report* which is available through subscription of approximately $100 per year. A second excellent resource, especially in Recreation, is the *Recreation Executive Report.* Ordering information for these and other corporation materials is found in Table 3.

Searching in your own back yard is another good way to locate corporations in your immediate area that are involved in corporate giving. Recruiting a local stockbroker or banker to be on your foundation board of directors may be a good way to stay current with what corporations and businesses are doing in your locale. Realize that these individuals have professional confidences that they must keep, but in many cases they are very helpful in making suggestions as to the best potential corporate givers. In addition, it may be to your benefit to read *The Wall Street Journal, Fortune* and *Forbes* business magazines, *The Chronicle of Higher Education*, your local business and economic paper, and your local newspaper to keep up with the business and economic climate in your locale.

Corporations tend to give sponsorship to programs that will enhance their image in local and national markets, that provide additional benefits to their employees or their families, or that will enhance the quality of living in those communities impacted by their employees. By keeping up with the local economic climate and by appealing to these needs from the corporate giver, you can often be successful in obtaining funds or resources. The corporation does not have to be large for it to give money or support. Ninety-four percent of the corporations that made gifts to not-for-profit organizations gave $1,000 or less. Not-for-profit organizations can take full advantage of this type of giving by developing a simple plan of action that considers the following ideas.

1. Make a list of all the places your agency and staff spends money.

2. Ask your board members to also make a list of where they spend money.

3. Ask staff and board members to list every place they have worked either part or full-time over the past five to ten years.

4. Ask staff and board members to keep a card in their wallet or checkbook and each time they spend money during the next month list the name of the business that received their money.

5. Ask other organizations for the names of businesses and corporations that gave donations to th[illegible] over the past five years.

6. Combine all of these lists into a single list of "potentials" where you, your staff, or your board have spent money. Those businesses/corporations coming to the top of your lists should then be prioritized and contacted in terms of their willingness to support you in your programs.

Now that you have a list of businesses/corporations with which you do business, identify which one(s) you want to approach with your project, and decide who and how they should be best approached. Do not be too concerned with competition from other groups; most successful for-profit organizations are likely to give to a variety of worthy community causes.

Remember also that many for-profit organizations can give resources other than money. You may be better served, for example, by asking for volunteer talent in specialty areas that you don't have in your agency. A top-notch advertising firm could be asked to design your public relations materials, to design the new logo for your department, or even provide T-shirts for your next special event. An accounting firm could give assistance with bookkeeping and auditing needs. Another group may want to take on a project activity as community service such as running your local tennis or golf tournament or by providing the manpower for your local Special Olympics meet. Many corporations encourage their employees to give volunteer time to worthy community projects. Why not with your agency?

Current tax laws also allow for-profit organizations to "write off" much of their equipment costs over a four-year period. This means that they can choose to depreciate the value of their new equipment purchased during this four year period, and then donate the equipment to your agency and take the current market value of the equipment off their taxable income and purchase new equipment. Since the technology of word processors, personal computers, and other typical office equipment is advancing at such a rapid pace, progressive corporations want the most up-to-date equipment and are many times happy to donate their "old models" to you so that they can take advantage of the tax and technological advantages.

You may also be able to obtain office furniture when a company moves or wants to redecorate. Inform all of your board members and community advocates of your office and equipment needs and ask them to watch for opportunities for your agency to be first in line when a corporation needs to find a "charity" for it's discards. St. Norbert College in DePere, Wisconsin has one of the nicest weight training facilities in the country because the Green Bay Packers use their facility for preseason training. Whenever the Packers update the weight equipment in their regular training facility. they donate the "old" equipment to St. Norbert. The Kent Commons Community Center in Kent, Washington makes a nice sum of money each year because they negotiated through the Seattle Super Sonics to obtain the contract to provide playing space for a part of the summer. Similar opportunities are available in your community if you look for them.

External Funding Sources: Some Important Differences

Here is some additional information about the differences in external funding sources.

1. Personal contact with officers of foundations and corporations is far more important than with government agencies.

2. It is always a good practice to provide an abstract and budget summary when contacting a foundation or a corporation. Federal agencies, however, seldom request such information and seldom respond to it if submitted.

3. Foundations and corporations tend to fund activities for which government support is not available.

4. Foundations and corporations have much more flexibility in their funding procedures than do government agencies.

5. Foundations and corporations tend to give greater emphasis to the uniqueness and quality of the project than do government agencies.

6. Foundations and corporations generally have less detailed application procedures and guidelines thus leading to shorter and less detailed proposals. Government application procedures are usually very detailed and filled with red tape.

7. Foundations and corporations usually will accept a proposal at any time while government agencies have very specific application deadlines.

8. Foundations and corporations rarely require the volume of forms and assurances that government agencies require.

9. Foundations and corporations generally do not give reasons for proposal rejection and are under no legal obligation to do so. In most cases, government agencies are required to provide specific information on proposal rejection when *requested* to do so.

10. Foundations and corporations tend to be more flexible about how awarded funds are spent than are government agencies.

Summary

To summarize, a fundable idea is one that is new and innovative, has a good potential of being cost efficient, will be supported by local funds, has a clear, documented need, and is timely. In looking for potential external funding sources, you should start in your own back yard, using local resources first and then considering regional, state, and national resources. Most, if not all, of the resource guides, catalogs, magazines, and newspapers that you may need to identify potential funding sources are readily available for your use at the public library or through most college and university libraries. Doing your homework "up front" in the identification and selection of the right external funding source is time consuming, but will greatly improve your chances of your proposal being funded/supported.

Table 3. List of Sources for External Funding Agencies

GOVERNMENTAL AGENCIES

1. *Catalog of Federal Domestic Assistance*, Office of Management and Budget (published annually with periodic updates)

2. *Commerce Business Daily*, U.S. Department of Commerce (published on weekdays)

3. *Federal Grants and Contract Weekly*, Capitol Publications, Inc., 1300 N. 17th Street, Suite 1600, Arlington, VA 22209

4. *Federal Grants Reporter*, Federal Grants Information Center, 1725 K Street, NW, Suite 200, Washington, D.C. 20006

5. *Federal Register*, U.S. General Services Administration (published on weekdays)

6. *The Guide to Federal Assistance for Education*, Wilborn Associates, Inc., 14 Thornwood Court, Clover, S.C. 29710

7. *United States Government Manual*, U.S. General Service Administration.

All of the Federal publications listed are available from: Superintendent of Documents, Government Printing Office, Washington, D.C. 20402.

FOUNDATIONS

1. The Grantsmanship Center, 1031 South Grand Ave., Los Angeles, CA 90015

2. *The Foundation Center, 79 Fifth Ave., New York, NY 10003

3. *Directory of Research Grants*, Oryx Press, 2214 North Central at Encanto, Phoenix, AR 85004

4. Individual state guides or directories for foundations and charitable trusts are available through the Secretary of State or Attorney General's office in most states. State library systems also may have it available.

5. IRS Tax Returns for selected private foundations. Available through the state library system.

*All of the Foundation Center publications are available at this address with the exception of *The Foundation Directory* and *The Foundation Grants Index*. These items are distributed by Columbia University Press, 136 South Broadway, Irvington, NY 10533.

CORPORATIONS

1. *Special Events Report*, 213 West Institute Place, Suite 303, Chicago, IL 60610

2. *Recreation Executive Report*, P.O. Box 27488, Washington, D.C. 20038

3. *The Wall Street Journal*, (local news stand)

4. *Fortune Magazine*, (local news stand)

5. *Forbes Magazine*, (local news stand)

6. IRS tax returns, (state library system)

7. Local business and daily newspapers

OTHER POSSIBLE SOURCES

1. Annual reports

2. Telephone Directories

3. Newsletters

4. State and federal legislation

INFORMATION SERVICES

There are a wide array of informational services available, most for a price. Several hundred dollars is not uncommon for their services. The value of a particular service to a given agency varies greatly. Some will find one of the services worth the cost while others will not. You should examine each of the agencies carefully before purchasing any. Some of the services currently available are:

1. The Grantsmanship Center, 1030 South Grand Ave., Los Angeles, CA 90015

2. The Foundation Center, 79 Fifth Ave., New York, NY 10003

3. Foundation Research Service, Lawson Williams Associates, Inc., 39 East 51st Street, New York, NY 10022

4. Taft Information System, Taft Products, Suite 600, 1000 Vermont Ave., NW, Washington, D.C. 20005

5. The Oryx Press Grant Information System, The Oryx Press, 3930 East Camelback Road, Phoenix AZ 85018

6. *College and University Reporter*, Commerce Clearing House, Inc., 4025 W. Peterson, Chicago, IL 60646

7. *Guide to Federal Assistance for Education*, New Century Education Corporation, 440 Park Avenue South, New York, NY 10016

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CHAPTER

Step Three:

Writing the Proposal

The formal proposal writing process begins once the external funding source has been identified, contacted, and application materials received. This is the test of your efforts. The energy expended on a well thought out, researched, and written proposal will improve your chances immeasurably. The proposal writing process involves these three stages: completion of all application forms and assurances; writing the proposal narrative; and developing and presenting a detailed line item budget. As you begin this process the following suggestions should prove helpful.

1. Rea' the proposal guidelines carefully and repeatedly. Follov' them explicitly. Have someone else check your work.

2. Do the necessary preliminary work. Make contact with the key people in any supporting agencies.

3. Discuss the proposal with the various local people and agencies that will be involved in the project. Get their reactions and approval.

4. Make early contact with the office/c partment in your agency that will be responsible for the administrative details of proposal submission and project fund management. In organizations where there are multiple departments involved it will be necessary to contact each of them (e.g., personnel, comptroner, city manager, etc.). Get answers to the following questions:

   A. What is the process within your agency for approving the submission of your proposal?

   B. What assistance can this office provide for you?

   C. How are matters such as clearinghouse reviews, federal assurances and compliances, and project fund accounting handled?

   D. How much time will be needed for your agency to process the proposal internally?

5. Begin by making an outline of your overall proposal components.

6. Get critical reactions to this initial outline from agency personnel and others who may be involved with the project.

7. As the proposal is being written, a careful review by these same people will prove to be very helpful.

8. If various sections of your proposal are to be written by different people or departments, identify *one* person to take responsibility for integrating the sections and doing the final editing work.

9. When letters of support are needed, be quite specific in indicating to the people writing them as to what is needed. Such letters are most important when another person or agency is expected to make a substantial commitment to your project.

Institutional Support

As you become involved in the proposal preparation process you will find that it is very difficult for you to do all of the work by yourself. In most cases your agency can do a great deal to assist in the preparation of a good proposal. Depending on the size and nature of your organizational structure, this assistance may be either centralized or decentralized. In many cases the most effective approach is to centralize some assistance activities and decentralize others, depending on organizational function and strength. In any case, your proposal must show an organized, consistent approach to the external funding source.

In one community the recreation department determined the need for an elevator to make their facility more accessible and began soliciting funding for this project. A number of meetings with a local foundation were established to determine if support was present. Local business leaders were solicited in an effort to secure a broad base of support and to put pressure on the foundation. The city was contacted in an effort to secure their support for the project. The city, however, had just submitted another proposal for a sizable capital improvement to the same foundation. The city also indicated that no funds were available for their contribution but stated that the mayor would write a letter of support for the funding request. Needless to say, neither proposal was funded by the foundation because of the lack of communication within the city government structure. This example emphasizes the importance of gaining institutional support before outside support is solicited.

Some kinds of assistance many agencies provide during the proposal preparation process include:

1. help in developing appropriate expectations and scheduling the many steps that are a part of the preparation process;

2. assistance in the acquisition of necessary information;

3. assistance in the writing and editing of the proposal;

4. seed money and/or matching resource support in terms of office space, equipment, secretarial support, technical assistance, etc.;

5. simplified processes for handling federal assurances, compliances, and clearinghouse review procedures;

6. budgetary assistance in the determination of indirect costs and fringe benefit package percentages;

7. coordination with other proposals within the agency.

Writing Approach

Using a proper writing approach is extremely important. Proper grammar, sentence structure, and spelling are minimum expectations for any proposal. Consistency in presentation throughout the proposal is vital. It is very easy to be misleading by using terms that are common to you but may lead to confusion for the review team. An example of this lack of consistency would be using the term "Game Department," when in earlier material it was referred to as "The Washington State Department of Fish and Game." It is easier to use abbreviated terms to reduce this problem. Using the same example, Washington State Department of Fish and Game is presented to the reader the first time, followed by (WSDFG). This alerts the reader that in further references to this term, the abbreviation may be used in its place. This also allows for greater efficiency on your part as you write, because you do not have to continue to use the cumbersome term "Washington State Department of Fish and Game" any longer.

As you consider your writing approach the following suggestions may be helpful.

1. Good organization and structure are basic to good writing.

2. There is no substitute for practice in writing. The more times you rewrite your proposal, the better it will become.

3. Good structure begins with an outline which is visible and consistent throughout the proposal. A complete set of headings and subheadings are helpful in this regard.

4. Each section of the proposal should begin with an introductory statement (usually one sentence to one paragraph in length) that explains what will be discussed in that section.

5. Each paragraph should begin with a good topic sentence.

6. When possible, each section should be concluded with a section summary.

Title Page

Most application packets include some type of title page or project application form. If they do not, it is usually to your benefit to provide one in your proposal. At a minimum, the title page should include the following information.

1. Project title: a short, imaginative description of your project.

2. Name of project director with address and telephone number.

3. Complete name of the submitting agency with the name of the contact officer if different than the project director.

4. Beginning and termination dates of your project, inclusive.

5. Total funds requested.

6. Names, addresses and telephone numbers of other officers authorized to negotiate for or legally commit the submitting agency.

7. Signature of project director and all other authorizing officers.

The title page should be limited to one typed page of information. An example of a title page is provided in Sample 2.

Table of Contents

The table of contents identifies each of the major headings and subheadings by page number for quick identification and reference. If extensive Tables, Figures, and Samples are used, a listing of each of these items should also be included. An example of a table of contents is provided in Sample 3.

Proposal Narrative

Summary

The majority of application formats call for a project summary to be included at the beginning of the proposal. Frequently, it is included as a part of the proposal introduction. The project summary is not written until the proposal narrative is completed. This often confuses the beginning grant writer because it is placed at

Sample 2. Title Page.

PROJECT EXETRA

PROGRAM ASSISTANCE GRANT
FOR
EXTENDED EDUCATION IN THERAPEUTIC
RECREATION ADMINISTRATION

through
The Bureau of Education for the Handicapped
U.S. Office of Education

TITLE:	*PROJECT EXETRA*
APPLICANT ORGANIZATION:	University of Oregon Eugene, Oregon 97403
INITIATOR:	____________________ S. Harold Smith, Ph.D., MTRS Assistant Professor and Director Center of Leisure Studies Department of Recreation & Park Management University of Oregon Eugene, Oregon 97403 (503) 686-3602
AUTHORIZATION:	____________________ Aaron Novick, Dean Graduate School (503) 686-5128
FUNDING PERIOD:	June 1, 1980 to May 31, 1981 (1st year of 3 year funding cycle)
TOTAL FUNDS:	BEH/DPP Support Requested $ 101,593 University Support 99,878 TOTAL: 201,471

Sample 3. Table of Contents

CONTENTS

the beginning of the project proposal. It is also often confused with the proposal abstract that is written as a preliminary step in the formulation of the project idea.

The project summary is just that: a summary of the actual proposal as it is written. It is placed at the beginning of the proposal so the review panel may have an overview of what to expect as they review the proposal. The project summary is limited to one page or less and should *not* include information given in the title page. It should include key information from each of the major sections of the proposal. In essence, anyone interested in your proposal should be able to read the project summary and know exactly what it is you are attempting to do. An example of a project summary is found in Sample 4.

Introduction

The introduction begins the narrative portion of the proposal. In the introduction you must introduce your agency and establish agency credibility. In most application formats, the introduction is limited to one to five pages or as brief as possible while providing the information necessary to establish your credibility. When writing the introduction the following information needs to be addressed.

Identification of the agency applying for the funds including submitting agency purposes, goals, programs, activities, and clients/constituents. Many times this can be accomplished by providing a copy of the agency public relations brochure.

Sample 4. Sample Project Summary

The Washington State Department of Game (Department of Game) manages the Oak Creek Wildlife Management Area, located north of Yakima, Washington. Every winter, hundreds of elk migrate to the Oak Creek area to feed on hay put out by the Department of Game and volunteers. Thousands of Washington residents visit the area to view the elk at close proximity, as well as other wildlife such as bighorn sheep and deer. The only facilities at the site are employee housing and feed barns.

The Department of Game has proposed building an environmental education/information center at the Oak Creek Wildlife Management Area. The center would provide for visitors and school programs, as well as providing restroom facilities. The center would allow visitors to view the elk without having to stand outside in the snow. The center would be used throughout the year for educating the public about Washington's wildlife, particularly those species found the Yakima region.

There is a need for a public facility of this caliber in the Yakima region as there are currently no facilities for environmental education in the entire area. Residents of the Yakima and lower valley would be the prime user groups, although the public in general would also be served through the environmental education and wildlife management programs.

The center project would be administered through the state Inner Agency Council and regional manager for the Department of Game in the Yakima region. Regional and state staff and specialists would man the proposed center.

If this is done, the information should be summarized in the introduction with a copy of the actual brochure being placed in the proposal append: . for additional review.

Evidence of submitting agency accomplishments including statistical support and endorsements of these accomplishments by reputable sources. Direct quotes from clients, community advocates or involved professional people lend to much stronger credibility.

Identifies the qualifications of the submitting agency and its staff to accomplish the activities for which funds are being requested. This also helps to establish credibility in fiscal management, program provision, and project administration.

Introduces the organizational structure of the proposal and leads logically to the problem/needs statement.

Establishes the unique role being addressed in this particular problem/need.

An example of a proposal introduction is found in Sample 5.

Problem/Need Statement

The problem/need statement identifies and documents the need(s) to be met or the problem(s) to be resolved through this project. This section must establish the problem or need as great enough for the external funding source to provide support for it. The problems/needs described must be consistent with the philosophy and goals of both the external funding source and the submitting agency and must directly relate to the objectives and activities described within the proposal.

The problem/need should be of reasonable dimensions, not trying to solve all possible problems in a single project. Whenever possible, problems/needs should be substantiated with specific data and supported by statements from recognized authorities and program constituents. If the problem/need is substantially out of the ordinary, there is an even greater necessity for providing quality supporting data. The problem/need should be stated in terms of the constituents' problems/needs and should be developed with input from the constituents and/or program beneficiaries.

Problem/need statements should reflect an understanding of related research or other projects currently functioning or being designed to meet this problem and should make no unsupported assumptions or generalizations. If the project is a research proposal, this section must also include a review of related research/literature. In the case of a research proposal, the needs section must be a

Sample 5. Proposal Introduction

Since it's foundation in 1935, the Washington State Department of Game (Department of Game) has been charged with the managing of sports fish and all of Washington's wildlife. The Department of Game is divided into six regions to provide public service throughout the state. Along with wildlife management of animals that are hunted, the department also provides programs for non-game animals and endangered species. The Department of Game manages and protects all of the wildlife in the state for all of the citizens of Washington, for the purposes of recreation, aesthetic beauty, sound ecology, and for the benefit of future generations.

The Department of Game provides a wide variety of programs throughout the state as well as managing public lands for diverse recreational activities. The department sponsors educational talks with school groups about wildlife, hunter safety education programs, advice to private land owners on wildlife management, wildlife surveys and studies, game farms, and fish hatcheries. The Department of Game works with other public agencies such as the U.S. Forest Service, Inner Agency Council for Recreation, Department of Ecology, Department of Natural Resources, and others including many public interest groups.

The Department of Game provides services to all of the citizens in the State of Washington, whether or not the individual is a hunter or a fisherman. The primary source of funding for the department is from the sale of licenses and tags. Some monies are received from the federal government for specific programs and the department has received grants for the Kessler Corporation, Texaco, Friends of Wildlife, and others. "The Department of Game", states the Kessler Corporation, "effectively manages the rich and diverse wildlife populations of the state for all to enjoy, including educating the public to better appreciate their natural resources."

The Department of Game has already established two environmental education/ visitor cent in western Washington at Marshy Creek in Olympia and Ariohead on the San nds. The purpose of this project is to construct a similar center in the southea of the state, Yakima region. The center would be constructed at the Oak Cree ife Habitat Management Area where thousands of people come annually to view wintering elk and bighorn sheep.

substantial piece of scholarly work that goes beyond the compilation of an annotated bibliography. The needs section must make a compelling case for the importance of your project being funded. An example of a problem/need statement is found in Sample 6.

Objectives

The purpose of the objectives section is to establish the benefits of the project in measurable terms. This means that you must describe what it is you want to do

Sample 6. Needs Statement

> Many elderly people suffer the multiple threats of chronic disability, poverty, social isolation, and reduced mobility. It becomes more and more difficult for them to maintain an independent lifestyle since they feel vulnerable to medical and environmental emergencies but are alone and "out of reach". Thus, many older adults are confronted with limited living options that may include:
>
> 1. institutionalization;
> 2. securing daily home health care services through local agencies or homemaker help from relatives and friends; and/or
> 3. living with their unsatisfactory situations.
>
> The costs and availability of institutions and service options are obviously a limiting factor: limiting in the sense that institutional care may not be affordable or desirable to elderly, and further, home health services are generally not adequate to meet the constant demand.
>
> Based on 1980 Census Data, 16.7 percent, or 28,913 residents of Yakima County's population, are aged 60 or older. Of this total, 24 percent or 7,046 elderly persons live alone, and 35 percent of these people who live alone have incomes below the poverty level. In addition, 5,723 people are disabled to the extent that they are prevented from working. Both the elderly and the disabled share the jeopardy of living alone on a fixed income with chronic health problems in relative isolation.
>
> Yakima County demonstrates a definite need to assist these elderly and disabled residents who do not possess the capability to maintain an independent living situation. This assistance should be such that the individual's personal security and self worth are maintained. The Operation Lifeline Program has been established to meet these needs.

in specific and detailed "outcome" statements. If at all possible, these outcome statements should be expressed in measurable terms. The objectives may describe the outcomes in terms of changes in behavior, new processes to be developed, or new products applied. In some cases they may be expressed in terms of levels of performance called performance objectives. To be successful at this task, objectives should describe the outcomes or end products to be obtained, the time period in which the expectations will be achieved, the conditions under which action will occur, and, if possible, how much will occur. Using action verbs that indicate measurable outcomes will help in this process: to say, "to increase", "to reduce", or "to decrease" are objective action type statements. To say, "to provide", "to create", or "to develop" are procedural type statements, not outcomes. Procedures are a part of methods and will be covered in that section.

To assist in this process, here's an example of a performance or outcome statement that includes each of the key elements described.

Over a five-week period, the participants will decrease their running time in the 400-meter dash by five seconds, running on a standard 400-meter track from a standing start.

This example explains who is going to do what, when it will be accomplished, how it will be accomplished, and by what standard the accomplishment will be evaluated. The more specificly the objective can be stated, the better.

It is important for there to be at least one outcome statement or objective for each problem/need identified in the need statement. This means that there will be an outcome statement in the objectives section for each of the problems/needs listed in the need statement and at least one activity listed in the methods section for each outcome statement presented in the objectives section. Each section of the proposal narrative leads logically into the next, giving the proposal consistency. An example of a proposal objectives section is provided in Sample 7.

Methods

The methods section describes in as much detail as necessary the activities to be accomplished in the project. This section describes how the project objectives will be accomplished. It should consider the following items:

1. The overall design of the project.
2. Specific activities that are planned.
3. The relationship between activities and objectives.
4. The specific procedures used to implement the program.
5. How program participants will be selected.
6. The personnel, facilities, and equipment that will be needed.
7. The role key personnel will play, including program participants.
8. The time schedule or timelines indicating completion of project components.
9. How and who will administer the project.
10. Plans for cooperative arrangements with support agencies.
11. Description of project "deliverables," e.g. newsletters, training materials, publications, treatment procedures, patents or copyrights, seminars or workshops, and project reports.

Sample 7. Project Objectives

The primary objectives of the Operation Lifeline Program are:

1. To help the low income elderly and/or disabled to maintain independence in their own homes with the greatest possible security. confidence, and dignity by the addition of 30 new Lifeline Units in 1987.

2. To reduce the sense of isolation for the elderly and/or disabled and to provide a feeling of security that one can receive help quickly in case of accident or illness, by conducting in-home demonstrations to train the subscriber about usage of the Lifeline System.

3. To decrease the threat of institutionalization and increase the opportunity to link frail persons at home with the full range of medical and social services available by adding a program coordinator to assure successful program operation.

4. To assure those that are socially isolated that they can receive protective emergency services in the case of crime or environmental stress, by providing ongoing Operation Lifeline procedural information through workshops/training seminars to all law enforcement agencies in Yakima County.

5. To increase the capability to identify needy and other qualified subscribers within the community that could benefit from the Lifeline System, by continuous contact with all appropriate health services involved in providing subscriber referrals.

6. To maintain the quality of service the Lifeline subscribers now enjoy as the quantity of Lifeline units increase by monitoring/analyzing documented reports provided by the SEMC Emergency Department to assure a long-term individual case management approach.

In your discussion on project personnel it is necessary to consider the following guidelines:

1. Include at least a one paragraph description of each of the key project personnel.

2. Provide some type of experience or background information that is directly related to the project for each of the key personnel.

3. It is not uncommon to place a full vitae for each of the key personnel in the proposal appendix.

4. If project personnel will need to be hired after the project is awarded, provide job specifications and qualifications for each

position to be hired. Detailed specifications should also be placed in the proposal appendix.

5. Describe the use of all project consultants.

It is important that the methods section flow naturally from the project needs and objectives. It is not necessary that this section be extremely long or detailed; rather, it should cover all procedural bases in an organized and direct manner. It should describe a reasonable array of project activities that will be accomplished in a timely, organized fashion. Examples of a methods section are presented in the completed sample grants listed in the Appendix.

Evaluation

Most external funding sources will ask for an evaluation section in your proposal. Evaluation is a process of posing value questions and collecting information of importance in the decision-making process in your project. There are several types of evaluation techniques that may be used in accomplishing this task. A short review of the most common types of evaluation will be helpful in understanding the process and organization of your evaluation plan.

Product Evaluation. An evaluation of the results of the program. It may also be called an outcome evaluation or a summative evaluation. The successful product evaluation determines the extent to which the program has achieved its stated objectives and the extent to which the accomplishments of objectives can be attributed to the program.

Process Evaluation. An evaluation of the conduct of the program. It may also be called a formative evaluation. This type of evaluation determines whether the program has been conducted in a manner consistent with stated objectives and examines the relationship of different program activities to overall program effectiveness.

External Evaluation. An evaluation conducted by an individual(s) who is not a part of your project staff thus providing for an objective outside review.

Internal Evaluation. An evaluation conducted by a member(s) of the project staff thus providing for an inside review.

The decision as to which type(s) of evaluation is best for your project will likely depend on the resources available and the guidelines of both the external funding source and the submitting agency. Whatever is decided, the main consideration should be the development of meaningful information that will benefit the project and those it is designed to serve.

Some characteristics of a good evaluation plan include the following:

1. It clearly :ates the criteria of success.

2. It addresses the major decisions that must be made.

3. It is cost effective.

4. It is manageable.

5. It identifies any instruments or questionnaires to be used.

6. It identifies any reports that will be produced.

7. The basic design is appropriate for the project.

Since the evaluation section of a proposal will vary greatly according to project objectives, it is difficult to provide a single example of an evaluation plan. It should also be noted that many application formats include the evaluation section as a part of the methods section. Examples of sample evaluation plans are presented in the sample grants in the Appendix.

Budget Preparation

External funding sources will always ask for a detailed budget with your proposal. Typically, government agencies require a great deal of detail and usually provide a budget form with instructions as a part of the application packet. Foundations and corporations, on the other hand, are usually less formal in their budget approach. It is always important, however, to present a well-thought out and complete budget to any type of external funding source.

The budget delineates the costs to be requested from the external funding source as well as those to be provided (either through agency match or by donation) from the submitting agency or other supporters. If the external funding source provides a budget format to be followed, then by all means follow that format. If a format is not provided (and this is often the case) then it is important that each of the main areas of the budget be covered in your budget presentation. In most cases it is also to your benefit to present a line item budget and a supporting budget narrative as a part of the overall budget presentation.

The following guidelines will be helpful as you begin to develop your project budget.

1. Fill out all forms according to the instructions given.

2. Estimate all costs very carefully and remember that they are estimates that will probably be adjusted when the actual award is given.

3. Identify the total cost (project cost), the external funding source cost (funds requested), and the submitting agency costs (donated funds or matching funds) for each line item.

4. Inflation factors should be built into each budget line item.

5. Make budget figures reasonable but as generous as the external funding source guidelines provide.

6. Include indirect costs that will pertain to the project.

7. Identify and meet the cost sharing and/or matching fund expectations of the external funding source.

8. Double check the consistency between the budget and the narrative portion of the proposal.

9. Do not ask for budget items that the external funding source states they will not support.

Line Item Budget

Each line item budget should cover at least three main categories: personnel costs; non-personnel costs (personnel and non-personnel costs are often referred to as direct costs); and indirect costs. For those funding sources that will provide support for the development and construction of new areas and facilities, a fourth area, capital costs, should be added. The construction of a budget should identify each line item with a column for funds requested (from the external funding source), funds donated or matched (from the submitting agency), and total project funds (funds requested plus funds donated or matched equal total project funds). Personnel costs should include all salaries, wages, and fringe benefits (mandated, voluntary, and FICA) for all key project personnel. Non-personnel costs should include all program-related costs including such things as: space costs and rentals; equipment costs; leases; consumable supplies including paper, pencils, letterhead, envelopes, and so on; travel, both in-state and out-of-state, that is directly related to project objectives; telephone, including installation fees and monthly rates; postage; printing; insurance; and any other contractual type of service.

Indirect costs are those costs incurred by the submitting agency for program administration that the external funding source is willing to support. These indirect costs are usually a negotiated percentage of the total direct cost of the project. Some external funding sources will not pay indirect cost; others do it as a matter of routine. Indirect costs may vary from as low as 0% to as high as 50% of the direct cost.

Your budget presentation should show that you are going to use the awarded money wisely. Most external funding sources want to provide support for program activity components rather than personnel costs. A general principle to follow in developing your budget is to keep a 40%:60% ratio, or better, between personnel and program activity expenditures. This means that in the great majority of the cases, budgets should be weighted in the direction of program activity support.

The following are some points to consider as your budget is developed.

1. Under personnel costs, list each person to be employed by the project under separate line items. Identify the percentage of time spent in the project for each individual, showing the corresponding salary and fringe benefits.

2. Identify the percentage of each person's time that will be funded by the external funding source and the percentage funded by the submitting agency. If voluntary time is given, you may count that as time funded by the submitting agency as long as the amount credited is consistent with the level of work performed. If it is uncertain what the salary level for a position should be, or if the volunteer is not specifically trained to perform the job function, minimum wage should be used for the salary.

3. It is important that all fringe benefit costs are covered for all personnel listed. You must be very careful to identify the fringe benefit percentage for each personnel classification because professional staff and classified staff often have different benefit package percentages.

4. In most cases the fringe benefit costs are a part of the total funding request so they must be figured as accurately as possible. In rare cases, some external funding sources *do not* include fringe benefits as a part of the direct costs.

5. Consultants are usually considered as a part of non-personnel (program) costs because they are a part of program evaluation and are generally hired on a contractual basis. Such contracts usually represent a substantial cost savings to the project because fringe

benefits are not required. If consultant services are not contracted but rather considered as a part of personnel costs, then consultants must be identified in the personnel section and fringe benefits must be provided.

6. In non-personnel or program costs, if the submitting agency is supplying office space, desks, equipment, and so on as a part of the project agreement, the fair market value of each of these items can and should be listed on the budget as a part of the submitting agency match or donation support. Many external funding sources will allow a variety of support services to be included as a part of the submitting agency's match.

7. Unless specifically stated in the instructions, most external funding sources will not support the purchase of equipment and supplies that would typically be provided by the submitting agency as a part of normal business operations. The exception to this would be the necessity of equipment or materials that are not normally accessible to the submitting agency.

8. It is becoming more difficult to obtain travel funds from external funding sources unless that travel has a direct impact on project success. Even in these cases, it is essential to provide a detailed justification for travel funds in the budget proposal.

9. The percentage of indirect costs should be clearly identified as a part of the budget. In some cases this percentage will be negotiated with the external funding source before your application is submitted. In other cases, the submitting agency routinely takes an established percentage of the total direct cost to support their activities and agency overhead. It is not uncommon for submitting agencies to take as much as 50% or more of direct cost for indirect cost. It is important to find out very early whether the total amount of funds that you apply for will include the indirect costs or not. If indirect costs are required you must then reduce the direct costs enough to cover these indirect costs. This may mean that you have to go back and adjust your program activities accordingly. For example, if you were applying for a $75,000 grant and you know that there will be a 20% indirect cost expectation, then your direct costs can total only $60,000 (20% of $75,000=$15,000; $75,000−$15,000=$60,000).

An example of a line item budget is found in Figure 5. A review of this sample budget shows the submitting agency providing $99,878 in total direct and indirect costs, the external funding source being requested to provide $101,593 total di ect and indirect costs, giving a total project cost of $201,471. The amount of detail needed in the line item budget will depend completely on the extensiveness of the project proposal.

Budget Narrative/Addendum

It is often a good practice to provide the external funding source a budget narrative/addendum that goes into a brief explanation of each of the budget lines. This budget narrative/addendum is usually attached to the project proposal in the proposal appendix. A budget narrative/addendum for the line item budget found in Figure 5 is presented in Figure 6. Additional examples of both line item budgets and budget narratives/addenda are found in the project proposals presented in the Appendix.

Figure 5. Budget

Project EXETRA I

Budget 1980–81

Category	Non-Federal Inst. Support	BEH/DPP Requested	Project Total
A. *Personnel*			
A-1 Project Director (.25 FTE, 12 mos.) or (25% for 12 mos.)	$18,085 (9 mos.)	$ 4,000 (3 mos.)	$22,085
A-2 Project Coordinator (1.0 FTE, 11 mos.)	—	17,778	17,778
A-3 Project Practica Supervisor (1.0 FTE, 9 mos.)	—	15,000	15,000
A-4 Faculty Advisors to Project (3 @ .10 FTE, 9 mos.)	6,600	—	6,600
A-5 Project Secretary (Secretary II level, 12 mos. @ $800/mo.)	—	9,600	9,600
A-6 Project Trainees (4 @ GTF III, 30 FTE, 9 mos.)	—	17,200	17,200
A-7 Work Study	—	750	750
TOTAL PERSONNEL	24,685	64,328	89,013
B. *Fringe Benefits*			
B-8 Standard 26%	6,418	12,058	18,476
B-9 Students 5%	—	860	860
B-10 College Work Study Personnel	—	188	188
C. *Travel*			
C-11 In-state Travel	400	1,600	2,000
C-12 Out-of-State	—	2,500	2,500

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Project EXETRA I
Budget 1980–81
Page 2

Category	Non-Federal Inst. Support	BEH/DPP Requested	Project Total
D. *Equipment*			
D-13 File cabinets, desks, chairs, etc.	$1,000	$ —	$1,000
D-14 Equipment maintenance contract	500	650	1,150
E. *Supplies*			
E-15 Office and classroom	500	650	1,150
F. *Contractual*			
F-16 Photocopying (12 mos. @ $63)	200	556	756
G. *Consultants*			
G-17 Consultant: Contracting for Project Evaluation & Selected Course Instruction (1 class @ $1200 + 10 days @ $100/day)	—	2,200	2,200
H. *Other*			
H-18 Conference Registration Fees	—	300	300
H-19 Communications (postage, telephones)	250	1,200	1,450
H-20 Printing (Annual Report, Newsletter, Evaluation Materials)	—	1,200	1,200
H-21 Tuition GTF (520 × 3 × 4)	—	6,240	6,240
H-22 Tuition Program Fellow (520 × 12 × 4)	24,960	—	24,960

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Project EXETRA I
Budget 1980–81
Page 3

Category	Non-Federal Inst. Support	BEH/DPP Requested	Project Total
I. *Total Direct*			
I-23 Direct Cost	$58,913	94,530	153,443
J. *Indirect*			
J-24 U. of O. 31.3% of TDC	18,440	—	18,440
J-25 31.3% less Fed. amt. allowed	22,525	—	22,525
J-26 Fed. (8% of Direct Charge)	—	7,063	7,063
TOTAL INDIRECT	40,965	7,063	48,028
K. *Total*			
K-27 Total Direct and Indirect Charges	$99,878	$101,593	$201,471

Figure 6. Budget Narrative/Addendum

BUDGET ADDENDUM
Category Line Item Explanation
Project EXETRA I

A. Personnel:*

A-1** *Project Director*

The project director for Project EXETRA is Dr. S. Harold Smith. Dr. Smith has a 10-year history of service, practice, and teaching in therapeutic recreation. For the past three years, Dr. Smith has been the Project Coordinator (Director of Project EXTEND-ED). He will carry responsibility as the therapeutic recreation curriculum coordinator in the Department of Recreation and Park Management as well as Director of the Center of Leisure Studies. He will also be responsible for the overall administration of Project EXETRA. Dr. Smith will be appointed on state funds for the normal academic year and on Project EXETRA funds during the summer term. Summer term responsibilities will include administration and evaluation of the Project. (Vita information on Dr. Smith is in Appendix I, p. 130).

A-2 *Project Coordinator*

The project coordinator position will be filled with notification of grant award and after a national search. Job qualifications for this position are found on page 38 of this text. The project coordinator will be responsible for the day to-day administration of the project. They will also be directly responsible for the development and evaluation of the Doctoral phase of the project. In addition, this person will teach a minimum of 5 classes during the academic year. This person will be on full appointment during the academic year and half appointment during summer session all funded by Project EXETRA.

A-3 *Project Practice Supervisor*

The project practice supervisor will be filled upon notification of grant award and after a national search. Qualifications for this position will be found on Page 38 of this text. The practice supervisor will have responsibility over the development and evaluation of the Master's phase of the project. They will also be responsible f. the selection coordination of practical sites. In addition, this person will teach a minimum of four classes, including practicum supervision, during the academic year. This position will be funded by the project for the academic year only.

* Headings refer to OE Form 9047, Section A. Budget Categories.

** Line items from supplementary budget statement on pages 5–6.

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A-4 *Faculty Advisors*
This budget item represents the principle faculty selected to be members of the Project Advisory Council. These individuals will be selected from the Department of Recreation and Park Management and the Center on Human Development. Other advisory council members will be selec' ›d from resources outsioe of the University of Oregon. Their financial contribution *is not* included within this budget item.

A-5 *Project Secretary*
The secretary designation is a basic secretariai position established on a full-time basis to handle correspondence, newsletters, annual reports, and other publications as well as to maintain the office for student advice and counseling. Responsibility for preparation of teaching materials related to the Project and the management of a specialized library maintained by the project also fall within this position. The position is housed within the Center of Leisure Studies, Department of Recreation and Park Management and is considered instrumental in assisting with accomplishing a majority of the project's objectives. All telephone calls, filing, correspondence, photocopying, proposal preparation, project reports, etc. are handled through the secretarial position.

A-6 *Project Trainees*
The project trainees are four Doctoral level individuals hired at the GTF III level to assist in forwarding the goals of the project. Each trainee is provided tuition and stipend through the project. The trainees play a vital role as Project Team leaders, practicum supervisors and evaluation assistants. Appointments will be on a 9-month academic year basis. The project trainees will also teach one course per year. The project trainee idea was developed on a trial basis two years ago in Project EXTEND-ED. Their presence and input has been so successful that they are considered key to the success of Project EXETRA.

B. *Fringe Benefits*

B-8, B-9 and B-10 This item supports the fringe benefit package offered through the University of Oregon. For the first time separate items for full time faculty and student employees are listed. Included within this package are FICA, retirement, health and dental insurance, workmen's compensation, unemployment insurance and employee liability insurance. Exact amounts of each part of the package depend on employee options and rate changes. The two percentages are based upon the University Business Office projection for 1980–81.

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C. *Travel*

C-11 and C-12 Project travel is based upon needs in two or three areas. First is travel to meetings requested/required of BEH for project staff generally held in Washington, D.C. or national convention sites. Second is travel to national and regional meetings/conventions in which project personnel would be involved. Third is in-state travel to state conferences, meetings and inservice/consultation/practicum sites. A majority of our best practicum sites are an hour or more away from Eugene, thus necessitating practicum supervision funds. Additional involvement of EXETRA staff other than the project director is desired, therefore sufficient funds for two individuals are budgeted to select conferences. Funds have also been identified for at least one staff member to attend a Type I Evaluation workshop.

D. *Equipment*

D-13 The University of Oregon, while having limited support funds, has supplied office space to house project staff and the capital equipment necessary to carry out the project goals and objectives. Staff office space is provided within the main Recreation and Park Management office. GTF office space is available in another building managed by the Department. All of the funds necessary for office upkeep are provided by the University.

D-14 A number of office machines, including an IBM Selectric typewriter are available for full use of the project. The only stipulation of use upon receipt of this equipment has been the assurance to pay the regular maintenance agreements.

E. *Supplies*

E-15 As previously discussed, the College of HPERDG and the RPM Department will provide Project EXETRA with office space, desks, filing cabinets, and approximately $500 worth of office supplies. The remaining expenses for necessary supplies will be made up from project funds. Most of these supplies are over and above the classroom materials generally covered out of the department budget.

F. *Contractual*

F-16 This item covers the cost of the photocopying services needed in relation to the project. This budget category has proven invaluable in assisting with the dissemination of the numerous reports and descriptive materials related to previous grant materials.

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G. *Consultants*

G-17 This category is presented for two main reasons. First, as a resource to bring in an outside consultant to help evaluate the progress of the project. Second, even though the University of Oregon offers an outstanding array of academic and professional talent, it is desirable for selected experts in the area of therapeutic recreation to be brought to our campus to provide our students with some breadth experiences.

H. *Other*

H-18 Registration fees for conferences are rapidly increasing and the University of Oregon requires these funds to be budgeted under an individual category title.

H-19 Communications and mailing items include payment for the updating of the office telephone system. A mailing of project promotional materials, publications and evaluation materials is also covered here. This item specifically meets the stated objectives concerning dissemination of project information and evaluation data.

H-20 Included within this category are printing of the project information flyers, application materials, newsletters, annual reports, and evaluation surveys and results.

H-21 The four doctoral level individuals hired at the GTF III position will have their tuition paid for. This line item represents the tuition for academic appointments of three quarters.

H-22 *Project Fellows*
This line item represents twelve tuition waiver fellowships provided by the University of Oregon for the masters degree students in Project EXETRA. The tuition waiver is provided for a minimum of three and a maximum of four quarters depending upon availability of funds. This item represents a unique cooperative effort between Project EXETRA and the University of Oregon that will be made possible only upon acceptance of this proposal by BEH. It should also be understood that this item shows the strong support that the University of Oregon is willing to provide to Project EXETRA.

I. *Total Direct Charges*

I-23 The figure $58,913 represents the non-Federal, University of Oregon support for Project EXETRA. This is to complement the requested $94,530 of support from BEH/DPP. Total direct charges for Project EXETRA amount to $153,443.

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J *Indirect*

J-24 and J-25 The figure $40,965 reflects 31.3 percent of the BEH/DPP and non-Federal institution direct costs as allocated to the University of Oregon under Federal regulations.

J-26 The amount of eight percent of direct charges has been standard in previous grant applications from the Department of Recreation and Park Management and is consistent with Federal rules and regulations in this area.

K. *Total*

K-27 Total direct and indirect charges for Project EXETRA.

Appendix

The proposal appendix is a section that comes at the end of the project proposal and may or may not be requested as a part of your application procedures. Whether it is or not, the appendix provides you with the opportunity to add support information and materials to your proposal that either space or context did not allow for in the proposal narrative. Appendix materials offer additional support, clarity, and credibility to your proposal. The appendix is divided into sections according to topic area, and is identified on the table of contents. For an example of an appendix section, please review the appendix section of this book.

The type of materials that are generally presented in the appendix are:

1. review of related literature;
2. agency brochures, newsletters, year end reports, and financial statements;
3. statistical data or studies that lend support and credibility to the proposal;
4. letters of support from key individuals and cooperating agencies;
5. budget narrative/addendum;
6. vitae of key project personnel;

7. listing of project job specifications;
8. samples of tests, questionnaires, or other evaluation materials;
9. samples of lesson plans, training materials, or similar deliverables;
10. detailed timelines for project implementation and evaluation;
11. any other item that you feel would be meaningful to the reviewer in support of your proposal.

Summary

Upon completion of your first draft, it is time to go back and summarize what you have written. This is done by asking yourself questions similar to those to be asked by the review panel. Provide the same questions to your colleagues and ask them to review the proposal. The questions below provide a summary checklist of those items you should have addressed before your proposal is ready for actual submission.

1. Has the rationale been stated clearly and convincingly? Does the submitting agency indicate an awareness of the problem? Is the proposal parochial or naive?

2. Have the objectives been specified operationally and in sufficient detail? Are they feasible? To what extent can the program be expected to accomplish the objectives? Do they claim too much? Are they trying to oversell? Are they guided by pious, unrealistic hopes?

3. What is the relationship of this proposal to other efforts in this particular area? Is the problem of enough significance to be worthy of funding? Who is most affected by the problem? How does the proposal fit into the submitting agency and the external funding source philosophy and priorities?

4. Does the proposal suggest sound administrative practices? Does the submitting agency have a history of proper administrative procedures? Does the submitting agency have the capability of taking on a project of the magnitude?

5. Are salaries and personnel assignments appropriate? Are lines of authority identified appropriately? Does the proposal show fiscal accountability? To whom is the project accountable: consumers, general public, agency board?

6. Is the budget realistic? Is it enough to do the job? Is there sufficient slack to provide staff the flexibility to respond to emerging contingencies? Has the budget been padded?

7. Should this proposal have been submitted to this funding source? Does it fit better with some other agency? Should it have been submitted to a local giver?

8. Does the proposal meet the technical guidelines and regulations published for this type of proposal?

9. Can the project be effectively evaluated? Are project staff capable of the evaluation or will an external evaluator be needed? On what criteria will the project be evaluated?

10. Is the proposal well organized with completed application forms, proposal narrative, and budget detail indicating project consistency and strength?

The final question to ask is, "What do I need to rewrite/revise to make my proposal more competitive?"

4

CHAPTER

Steps Four, Five, and Six:

Proposal Submission And Project Management

Introduction

Your project proposal should now be to the point of submission consideration. As a final check, many application formats provide a checklist to follow so that all required information is submitted properly. In addition to this procedural checklist, it is often a good practice to review your total proposal one last time to see if all of the standards of a good proposal have been met. If a team has worked on the proposal or if you are working with an outside agency, it may be appropriate for all of those involved to sit down and work through the final draft together. The following are guidelines for a gooc ompleted proposal.

1. The need for the proposed activity is clearly established and supported with meaningful data.

2. The most important ideas are highlighted and repeated in several places.

3. The project objectives are given in detail.

4. There is a detailed schedule of project activities.

5. Collaboration with all interested groups is evident throughout the proposal.

6. The commitment of all involved groups is evident, through letters of support, cost sharing, and so on.

7. The proposal narrative, budget detail, and budget narrative all tell the same story.

8. Fund allocation is clearly indicated in the proposal narrative and in the budget detail.

9. All of the major requirements listed in the application instructions are clearly addressed.

10. The agreement of all project staff, consultants, and collaborating groups is clearly indicated.

11. All government procedures have been followed with regard to such areas as civil rights compliance and protection of human subjects.

12. Appropriate detail is provided in all sections of the proposal.

13. Appendices have been used wisely to provide additional support materials.

14. The length is consistent with expectations of the external funding source.

15. The budget detail is clear and accurate.

16. The qualifications of the submitting agency and its staff are clearly communicated.

As you review these standards, you may need to go back and revise parts of the proposal one last time. Don't be afraid to do revisions as often as you feel it will be to your benefit. Also recognize, however, that timelines must be met and in some cases you must do the best you can with time and resources available.

Proposal Submission

Once the proposal is written, revised and ready to submit, many grant writers feel their task is complete. NOT SO! Following the submission directions to the last detail is the next important step. Some considerations that you must give to the submission process follow.

1. How many copies of the proposal are to be submitted? Many external funding sources want the original plus from three to seven copies.

2. What is the submission deadline? Submission deadlines ARE NOT flexible. Most instructions will note whether the application materials must arrive by a certain date or just be postmarked by a certain date. Many post offices do not automatically postmark all of their mail. This may mean that you will need to go to your local post office and see that your application packet is postmarked correctly.

3. Many submitting agencies have their own internal approval process that may take up to a week to complete. If you don't know this process ahead of time, you may not be able to obtain the necessary approvals and signatures before the submission deadline.

4. In the case of many government grants, several notification forms and/or postcards are required with the application submission. If these forms are not sent, your application will not be reviewed.

5. If timelines get very close, remember that many locations have access to one day or overnight postal and/or delivery service.

In most cases, the external funding source will notify you of receipt of your application materials. They will also give you a tentative date by which you can expect a decision. Be aware that the external funding source may accept all or only a part of your total proposal. In most cases the contact officer for the external funding source will come back to you and negotiate the exact project activities and budget items they are willing to support.

Submission to Multiple Agencies

Because of the high mortality rate of grant proposals, it is not uncommon for agencies to submit all or part of a proposal to more than one external funding source for consideration. If this is done, it is a matter of courtesy to inform each of your actions. At best, it is in poor taste—and at worst illegal—to accept an award for the same project from more than one source. Certainly, it raises some very delicate ethical questions that must be addressed. If your project should receive more than one positive response, careful negotiations with all involved parties are indicated to insure that no one is offended and that support is not lost. This is, of course, one of the pleasant problems in grantsmanship!

If your grant application is rejected, *don't give up*. Ask the external funding source to explain why your proposal was rejected. Use this information to revise your proposal and make it stronger. Submit it again in the next competitive round or locate another potential funding source and give them a try. Acquiring your first grant award is by far the most difficult.

Grant Administration

When you do receive a grant award, realize that you have been successful in only the first phase of the grantsmanship process. The second phase is the effective management of your project so that project objectives and activities are accomplished in a positive manner. If you do not manage your grant effectively, it is less likely that you will receive additional support from that external funding source. If, however, you do a good job in grant administration, you are almost guaranteed additional grant support in the future if funds are available.

Some easy to follow but often overlooked suggestions for effective grant management follow.

1. Whenever possible, select only one person to be the submitting agency contact with the external funding source.

2. If you have questions about your grant, contact the contact officer with the external funding source for clarification.

3. Send correspondence to a person, usually the contact officer, not just an address.

4. When signing documents, always put the date and title of the person signing. Do not take responsibility in areas where you have no official jurisdiction.

5. When submitting a continuation proposal, resubmit all required materials rather than referring to materials already on file.

6. Include your project name and grant identification number on all correspondence.

7. Be as direct and specific as possible in all correspondence.

8. Send separate letters for each grant in question when several different grant proposals may be involved.

9. Always ask before making any changes in the budget.

10. Keep multiple projects in separate files and administer them separately. This is especially important with budgetary items.

11. Keep your external funding source well informed of project progress and accomplishments. Periodically write a letter or call to provide them with project updates. Always send copies of project newsletters, year-end reports, and so on to your external funding source.

12. Actively direct your project to a prompt and satisfactory completion.

13. At the completion of your project, complete and submit all required reports and statements in a timely and professional manner.

Summary

Finally, it would be beneficial for you to consider the following common reasons why most grant proposals are rejected.

1. *The applicant did not follow the guidelines provided by the external funding source.*

   A. The application did not provide all of the information requested.

   B. The proposal objectives did not match the objectives of the external funding service.

   C. The proposal budget was not in the range of the funding identified by the external funding source.

   D. Local matching funds or resources were inadequate or uncertain.

2. *The proposal application lacked credibility.*

   A. Key phrases or target populations were not identified or were repeated so often that they became meaningless.

   B. The proposal depended on a "sympathetic" review panelist to understand and accept poorly presented materials.

   C. The application ha[illegible] lated rhetoric and assumed that the panel was familiar [illegible] or predisposed to support the proposal.

   D. Prospective client groups were not involved in the planning and development of the objectives and activities.

   E. There was a lack of community support for the project.

   F. The proposal was poorly written, difficult to understand, and was sloppily presented.

   G. There was a lack of evidence that the project would continue beyond the grant period.

   H. The project proposal had not been coordinated with other individuals and organizations working in the same area.

   I. The proposal objectives were too ambitious and/or the budget was unrealistic.

3. *Project activities were not adequately explained.*

A. Problems had not been clearly documented.

B. Identified problem did not appear significant enough for external funding support.

C. Needs, objectives, and program activities did not support each other.

D. Budget did not accurately support program activities.

A

APPENDIX

Sample Grant Applications

- Operation Lifeline
- Pacific Northwest Rural Recreation

OPERATION LIFELINE PROPOSAL

ABSTRACT

Operation Lifeline is a community-based program of St. Elizabeth Medical Center (SEMC). The purpose of this program is to provide a personal emergency response system which allows frail, elderly, and disabled persons in Yakima County to remain living independently in their own homes despite advanced age, chronic medical problems, or social isolation.

For the past 3 years, SEMC has sponsored the Operational Lifeline Program with initial funds from hospital guilds, civic and social organizations, and private donations. Through the provision of a telephone emergency alarm and response system, the program currently provides 54 individuals with a constant sense of security. If the Lifeline subscriber presses a small transmitter button which can be carried about, or if he/she shows unusual inactivity, the Lifeline system will automatically call for help to the 24-hour response base unit located in the SEMC Emergency Department.

At present levels, this emergency response system can only serve a small fraction of eligible subscribers in Yakima County while the waiting list continues to grow. The number of applications for the Lifeline Service would be expected to greatly increase if publicity efforts were stepped up or if social service agencies were invited to refer their clients.

The St. Elizabeth Community Health Foundation is seeking funds in order to expand the Operation Lifeline Service to others, and dissolve the waiting list of eligible subscribers. We are asking the Glaser Foundation for $25,000 to provide ongoing financial support necessary to operate and expand the program. This fund request will enable us to meet a greater percentage of the need that is evident in the Yakima community. Specific funding includes the purchase of 30 additional Lifeline units, one part-time personnel cost to keep up with expansion demands, and operational costs not covered by the $8 monthly subscriber fees.

I. Introduction

St. Elizabeth Medical Center, now in its 93rd year of service to the Yakima Valley, is operated under the sponsorship of the Sisters of Providence, headquartered in Seattle. The 189-bed hospital is a recognized nonprofit, tax-exempt organization. Operation Lifeline is viewed as a natural outgrowth of the Sisters' Mission, which reflects a principal commitment to the care of the poor and elderly.

Operation Lifeline is a protective human service with the program goal of providing a personal emergency response system that enables the lower income, the disabled, and the socially isolated elderly persons to maintain an independent living situation. The Lifeline equipment provides 24-hour access to emergency medical help at the press of a button. Each of the 54 subscribers have a Lifeline communicator/unit at home with a portable button that can be worn on clothing or carried around the house in a pocket. At the first sign of trouble, the "at risk" person can push the button. This sends an electronic message, via the telephone to the SEMC Emergency Department where trained personnel arrange for help. The Lifeline equipment even has the ability to send a signal for help when the subscriber is unconscious. (Please refer to Appendix A for further Lifeline System information.)

Operation Lifeline has proven to be reliable and effective. Subscribers have used the equipment in cases of heart attacks, falls, strokes, emotional distress, robbery and assault. Many emergencies occur at night when there is no help available in the home, and neighbors are asleep. There are approximately 50 emergencies expected for every 100 users.

Operation Lifeline has saved lives in Yakima County. One recent emergency incurred by a 59 year old subscriber that lives alone and has severe respiratory problems, which were complicated one morning by a viral infection she had contracted. When she found it too difficult to breathe, she pressed her personal HELP button which relayed the message for help to the SEMC Emergency Department. A nurse at the Response Center called the subscriber's first responder (a neighbor) who went quickly to her home, evaluated the situation, and then called an ambulance. The entire process took only seven minutes. From her hospital bed, the subscriber agreed that the Lifeline System is a lifesaver, "I can't imagine anything more wonderful for people like myself who live alone."

II. Problem and Need

Many elderly persons suffer the multiple threats of chronic disability, poverty, social isolation, and reduced mobility. It becomes more and more difficult for them to maintain an independent lifestyle since they feel vulnerable to medical and environmental emergencies but are alone and "out of touch." Thus, many older adults are confronted with limited options that may include:

1. Institutionalization

2. Securing daily home health care services through local agencies or homemaker help from relatives and friends

3. Living with their unsatisfactory situations.

The cost and/or availability or institutions and service options is obviously a limiting factor; limiting in the sense that institutional care may not be affordable (or desirable) to the elderly, and further, that home health services is generally not adequate relative to demand.

Based on 1980 Census Data, 16.7 percent or 28,913 residents of Yakima County's population are aged 60 or older. Of this total, 24 percent or 7,046 elderly persons live alone, and 35 percent of these people who live alone have incomes below the poverty level. Additionally, 5,723 people are disabled to the extent that they are prevented from working. Both the elderly and the disabled share the jeopardy of living alone on a fixed income with chronic health problems in relative isolation.

Yakima County evidences a definite need to assist those elderly and disabled residents who do not possess the capability resources to maintain an independent living situation. The assistance should be such that the individual's personal security is also maintained. The Operation Lifeline Program goals fulfill this need.

III. Objectives

The primary objectives of the Operation Lifeline Program are:

1. To help the low income elderly and/or disabled individuals maintain independence in their own homes with the greatest possible security, confidence, and dignity, by the addition of 30 new Lifeline Units in 1986.

2. To reduce the sense of isolation for elderly and/or disabled by providing a feeling of security that one can get help quickly in case of accident or illness, by conducting in-home demonstrations to train subscribers about usage of the Lifeline System.

3. To decrease the threat of institutionalization and increase the opportunity to link frail persons at home with the full range of medical/social services available by adding a program coordinator to assure successful program operation.

4. To assure those that are socially isolated that they can receive protective emergency services in the case of crime or other environmental stress, by providing ongoing operation Lifeline procedural information through workshops/training to all law enforcement agencies in Yakima County.

5. To increase the capability to identify needy and qualified subscribers within community that could benefit from the Lifeline System, by continuous contact with all appropriate health services involved in providing subscriber referrals.

6. To maintain the quality of service the Lifeline subscribers now enjoy even as the quantity of Lifeline units increase by monitoring/analyzing documented reports provided by the SEMC Emergency Department to assure a long term individual case management approach.

IV. Methods and Activities

Since the purpose of Operation Lifeline is to provide a personal emergency response system for low income, disabled, and the socially isolated elderly persons to maintain an independent lifestyle, there are three functional components that aim toward this goal. These components performed throughout the program include administering the program, installation and maintenance of Lifeline equipment, and the emergency response center monitoring.

A. Program Administration Activities

1. The program director will implement a process of participant recruitment, insuring that all eligible persons are made aware of and encouraged to participate in program services for 30 new subscribers.

2. The program director will receive inquiries and determine needy clients through a screening and selection process according to established criteria (health status, income, residence, and degree of isolation).

3. The program director will establish and provide linkages with all appropriate social service agencies, medical facilities, and media to notify in case of available Lifeline units (i.e. verbal and written contact).

4. The program coordinator will schedule intake visits with new subscribers and secure rental agreements.

5. The program coordinator will schedule volunteers for conducting in-home demonstrations to train user and emergency 1st responders (family, friends and neighbors) about the Lifeline System, and to make monthly contact calls.

6. The program coordinator will order installation of Lifeline units for new subscribers.

7. The program coordinator will respond to questions and problems of subscriber, Lifeline installer, and volunteers.

8. The St. Elizabeth Community Foundation secretary will provide the billing service for all existing and new subscribers.

9. The SEMC Education Department secretary will prepare and send notifications of installations, repairs, and removals as well as quarterly Operation Lifeline Newsletters to all subscribers.

10. Trained volunteers will provide in-home demonstrations of the Lifeline System to train the user and emergency 1st responders (family, friends, and neighbors); and make monthly contact with each subscriber to review and evaluate status, and to test each system.

B. Installation and Maintenance

1. The volunteer installer will receive orders and schedules of installations and coordinate time of Lifeline unit installation with program coordinator.

2. The volunteer will respond to repair and removal requests immediately, and perform systematic testing when necessary.

3. The volunteer will provide technical training to additional volunteers on installation, removal, and testing procedures.

C. Emergency Response Center

1. SEMC Emergency Department will provide and train personnel to monitor the Lifeline base unit with 24 hour, 7 days/week coverage.

2. SEMC Emergency Department personnel will decode emergency signals and initiate an emergency plan on the Lifeline subscriber's behalf.

3. SEMC Emergency Department personnel will monitor outcome and maintain incident/outcome documentation.

4. SEMC Emergency Department personnel will participate in equipment testing.

5. SEMC Emergency Department will be responsible for base unit maintenance and repair.

Through the provisions of the requested funds from the Glaser Foundation, Operation Lifeline will implement a specific time line of events to accomplish the stated objective of expanding services to meet the growing needs of the low income elderly, disabled and socially isolated population of Yakima County.

The proposed time line of increasing subscriber Lifeline units is as follows:

1. By September 1, 1986, the program director will disseminate information about 30 additional Lifeline units available to appropriate social service agencies and medical facilities for subscriber referrals.

2. By September 30, 1986, the program director will begin the screening and selection process of new applicants according to Lifeline subscriber criteria.

3. By September 30, volunteer Lifeline equipment installer will provide technical training to additional recruited volunteers on installation procedures.

4. By October 15, 1986, the program coordinator will start scheduling intake visits with new subscribers and secure rental agreements.

5. By October 31, the program coordinator will schedule volunteers to conduct in-home training demonstrations for 10 new subscribers and 1st responders about the Lifeline unit functions and procedures in conjunction with equipment installation.

6. By November 30, 1987, the program coordinator will schedule volunteers to conduct in-home training demonstrations for 10 new subscribers and 1st responders about the Lifeline unit functions and procedures in conjunction with equipment installation.

7. By January 1, 1987, the program coordinator will schedule volunteers to conduct in-home training demonstrations for the remaining 10 new subscribers and 1st responders about the Lifeline unit functions and procedures in conjunction with equipment installation.

8. Monthly telephone calls to subscribers by trained volunteers will be conducted to test each system as well as reviewing and evaluating present status.

9. By July 15, the program director will disseminate survey questionnaires to subscribers, community service organizations providing referrals, and program personnel/volunteers.

10. By August 30, the program director will evaluate satisfaction and the effectiveness of Operation Lifeline.

The proposed timeline for additional personnel is as follows:

1. By September 1, 1986, the program director will advertise for a part-time program coordinator staff position (.25 FTE).

2. By September 29, 1986, will complete the selection process of program coordinator applicants.

3. By October 1, program director will begin orientating new employee to program coordinator position.

4. Monthly staff meetings will be conducted to provide ongoing training of the Operation Lifeline service, as well as staff the subscriber cases of reported emergency calls.

V. Evaluation

While expansion efforts are underway to accomplish the objectives of helping low income elderly, disabled and socially isolated individuals maintain an independent lifestyle, Operation Lifeline will continue to strive for optimal quality of service. The SEMC Educational Services Department will maintain evaluative responsibility by:

1. Monitoring/analyzing documented reports of the emergency response center in terms of emergencies and how they were handled, life-saving effectiveness, and quality control.

2. Monthly telephone call checks to subscribers by trained volunteers, serving to retrain the subscriber in the use of the service if necessary, or to detect any problems that may need professional follow up.

3. Survey forms to assess the satisfaction as well as the effectiveness of the service in meeting the needs of the subscriber at the end of the program year, designed for the subscriber as well as those providing the Operation Lifeline Service.

VI. Continuation of Service

The Lifeline equipment is expected to provide a minimum of 8 to 10 years of service and can be used with many different clients, some for short periods during convalescent recovery and others for long-term period. Once the equipment is purchased, the cost to maintain the program is relatively small, and is partially offset by the $8/month subscriber fees.

When one subscriber no longer has need of the Lifeline unit, the unit becomes the property of Operation Lifeline, therefore it can be removed and reinstalled into the home of a new subscriber. Since these units usually last longer than the average subscribers need, this assures maximum equipment utilization at minimal cost to the elderly.

VII. Future Funding

Because Operation Lifeline relies primarily on hardware (Lifeline units/equipment), the funding directly affects the number of needy people served. Presently, the program has been scaled down to the level of funding available. However, it is anticipated that the need is so great for emergency response systems that provide an independent lifestyle for thousands of elderly and disabled individuals living alone in Yakima County that in addition to the $25,000 request, we will need $50,000 (60 units) in the next two years.

Summary

There is a critical need evident in Yakima County to provide cost effective alternatives to those vulnerable individuals threatened with institutionalization or unsatisfactory living conditions. Operation Lifeline addresses this need—the isolation and vulnerability of many elderly persons who are trying to maintain themselves independently in our community despite disability, poverty, lack of social support and sometimes dangerous living conditions.

Under the sponsorship of St. Elizabeth Medical Center (SEMC) Operation Lifeline currently serves 54 eligible subscribers. The program consists of mostly SEMC donated personnel and dedicated volunteers who plan and implement direct services to the subscribers. The specific implementation of the program includes administration, installation and maintenance of Lifeline equipment, and the emergency response center monitoring.

Volunteers are a vital part of Operation Lifeline. The monthly follow up calls by three volunteers, and the volunteer Lifeline installer maintain the spirit of personal caring. They add sensitivity and patience while lessening the social isolation for the elderly/disabled person, and the subscriber can sense that their involvement is a personal commitment.

The nature of this program is such that a large proportion of funds necessary to expand Operation Lifeline is the capital expenditure of one-time related costs (Lifeline equipment). The St. Elizabeth Community Foundation is requesting $25,000 which will enable this program to meet a greater percentage of the need that has been demonstrated for this service.

The 1-year expansion of this program includes additional personnel, 30 Lifeline units, and various other costs for successful program implementation and identification of needy individuals. Future funding after this initial year of expansion will be considered in 1987.

BUDGET SUMMARY 1986–87

	Total Requested	Total Donated	Total
Personnel			
A. Salaries & Wages	$ 5,280.00	$19,872.00	$25,152.00
B. Fringe Benefits	2,106.72	7,795.89	9,902.61
C. Consultant Services		1,728.60	1,728.60
Non-Personnel			
D. Space Costs		615.00	615.00
E. Purchase of Equipment	14,490.00		14,490.00
F. Consumable Supplies	1,070.00	200.00	1,270.00
G. Travel	184.44	184.56	369.00
H. Contractual	300.00	600.00	900.00
I. Telephone		130.00	130.00
J. Other Costs	1,569.00		1,569.00
Total this Grant	25,000.16	31,126.05	56,126.21
Indirect Costs 25% Chargeable to the Award	6,250.00		

BUDGET 1986–87

	Total Requested	Total Donated	Total
A. *SALARY & WAGES PERSONNEL*			
A-1 Program Director (.20 FTE × $1,760 × 12 mos.)		$ 4,224.00	$ 4,224.00
A-2 Program Coordinator (.25 FTE × $1,760 × 12 mos.)	$ 5,280.00		5,280.00
A-3 Program Secretary (.5 FTE × $1,256 × 12 mos.)		7,536.00	7,536.00
A-4 Program Billing Secretary (.5 FTE × $1,256 × 12 mos.)		7,536.00	7,536.00
A-5 ER Nursing Staff (4 hrs/mo × $12/hr × 12 mos.)		576.00	576.00
TOTAL PERSONNEL	$ 5,280.00	$19,872.00	$25,152 00
B. *FRINGE BENEFITS*			
B-6 SEMC Staff 39.9%	2,106.72	7,699.10	9,805.82
B-7 SEMC Nurses 18.4%		96.79	96.79
C. *CONSULTANT SERVICES*			
C-8 Volunteers (43 hrs./mo × $3.35/hr × 12 mos.)		1,728.60	1,728.60
D. *SPACE COSTS*			
D-9 Office Rent (.50 × $1,231/yr × 12 mos.)		615.50	615.50
E. *PURCHASE OF EQUIPMENT*			
E-10 Lifeline Units ($483/unit × 30)	14,490.00		14,490.00
F. *CONSUMABLE SUPPLIES*			
F-11 Glaser Foundation Engrave Nameplates ($9 ea. × 30 units)	270.00		270.00
F-12 Jack Adapters ($5 ea × 10 units)	50.00		50.00
F-13 Reprogram to Dial-1 ($15 × 10 units)	150.00		150.00
F-14 Belt Clip ($1 × 10 units)	10.00		10.00
F-15 Help Button ($40 ea × 10)	400.00		400.00
F-16 Battery ($15 ea × 10)	150.00		150.00
F-17 Instructional Subscriber Pamphlets ($30/200 quantity)	30.00		30.00
F-18 Subscriber Info. Cards ($10/100 quantity)	10.00		10.00
F-19 Office Supplies		200.00	200.00

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BUDGET 1986–87

	Total Requested	Total Donated	Total
G. *TRAVEL*			
G-20 Local Mileage for Lifeline Installer (150 miles/mo. @ $.20.5/mi. × 12 mos.)	$ 184.44	$ 184.56	$ 369.00
H. *CONTRACTURAL*			
H-21 Base Unit Maintenance Contract with SEMC Emergency Department ($300/yr—10/1/86–9/30/87)	300.00		300.00
H-22 Lifeline Unit Installer ($15/hr × 40 units)		600.00	600.00
I. *TELEPHONE*			
I-23 (1) Instrument & Service		130.00	130.00
J. *OTHER*			
J-24 Printing (PR, evaluation survey & 1469.00 misc. material)	1,469.00		1,469.00
J-25 Postage (Letters, survey forms, misc.)	100.00		100.00
K. *TOTAL DIRECT COST*			
K-26 Direct Costs	25,000.00	29,570.81	54,570.81
L. *TOTAL INDIRECT COST*			
L-27 St. Elizabeth Community Health Foundation (25% of direct cost)	6,250.00	7,392.70	13,642.70
M. *TOTALS*			
M-28 Total Direct and Indirect Charges	31,250.00	36,963.51	68,213.51

BUDGET ADDENDUM
Category Line Item Explanation
OPERATION LIFELINE

A-1 Program Director

The program director for Operation Lifeline is Cindy Norwood. Ms. Norwood has served as the Community Health Promotion Coordinator for the SEMC Education Services Department for the past year and a half, and has a strong background in planning and implementing a variety of health programs. She will carry the responsibility of directing the overall program administration and evaluation phase as 20 percent FTE for Operation Lifeline.

A-2 The program coordinator is currently being filled by Kari Baldwin, an intern from Central Washington University, with major studies in Community Health Education and Social Services. The appointment is on a 3-month summer basis, and at end of her appointment, Ms. Baldwin will be offered this position. However, in the event of her departure, a .25 FTE on program funds will be filled for this position that will continue Ms. Baldwin's responsibilities. The program coordinator will carry out the day-to-day implementation of Operation Lifeline as well as supervising and providing direction for all volunteers.

A-3 The secretary designation is a Secretary III position established on a .5 FTE basis. The position consists of duties that play a part in successful implementation of the program (i.e. all telephone calls, filing, subscriber correspondence, photocopying, program newsletters, etc.)

A-4 The Program Billing Secretary is currently filled by Donna Burrill, secretary for the St. Elizabeth Community Health Foundation. This secretary II position is established on a .5 FTE basis, and provides the entire billing/accounting service for the program.

A-5 The SEMC Emergency Department Nursing Staff provide the program with emergency response and monitoring of subscriber alarms, a critical component of direct service to the Operation Lifeline subscribers. The time spent is calculated according to time spend answering and documenting calls, follow up and monthly equipment testing participation.

B-6 This item supports the fringe benefits package offered.

B-7 Through SEMC, the requested amount refers to benefits for .25 FTE Program Coordinator.

C-8 This item refers to volunteer time spent on monthly subscriber telephone calls, and in-home demonstrations of Lifeline system to subscribers and 1st responders.

D-9 This item accounts for total office space needed for all program personnel/volunteers, and is by SEMC.

E-10 30 subscriber units consisting of Lifeline Communicator Model H101A as a complete ready-to-install unit that represents the major expenditure of funds requested.

F-11 This item covers the cost of engraved nameplates of your foundation to be placed on 30 new Lifeline units.

F-12 to F-16 These items account for average costs of replacement on a yearly basis for 84 total units.

F-17 and F-18 These items represent need supplies for direct service to subscribers.

F-19 This item accounts for basic program supplies, i.e. pens, pencils, typewriter ribbon, paper product,s etc., donated by SEMC.

G-20 Program travel is based on the average mileage of installer for new installations/removals of current number of Lifeline units, as well as travel for installation of 30 additional units per year. A local community service donates up to $15.38/mo., and the remainder travel costs are requested.

H-21 This item concerns a service contract with SEMC Emergency Department to repair/maintain the Base Unit Lifeline equipment on a yearly basis; costs are requested.

H-22 This is an estimation of the amount paid for an installer with the technical training and knowledge of the current volunteer installer. The estimated installer time spent includes new installations/removals of current number of Lifeline units, as well as installation of 30 additional units.

I-23 This item is donated by SEMC.

J-24 This item accounts for all PR costs as well as evaluation surveys and other miscellaneous material.

J-25 This item refers to postage required to disseminate all program materials.

K-26 The figure represents SEMC/Glaser Foundation support for Operation Lifeline. This is to compliment the requested amount of support from the Glaser Foundation. Total direct charges for Operation Lifeline are $54,570.81.

L-27 The amount of twenty-five percent (25%) of direct charges is the standard used by St. Elizabeth Community Health Foundation (please refer to attached Appendix B) and is consistent with Federal rules and regulations.

M-28 Total direct and indirect charges for Operation Lifeline.

THE LIFELINE SYSTEM

The Lifeline System

Lifeline was designed by Professor Andrew Dibner, a Boston University specialist in rehabilitation and gerontology. The system was studied and tested in a three-year $640,000 grant provided by U.S. Department of Health, Education, and Welfare research grant.

Lifeline is a system consisting of:

1. Home unit electronic equipment

2. A response center monitor located in the SEMC Emergency Department

3. Neighborhood First Responders

These combined features reduce isolation and provide 24-hour emergency response.

A wireless call button is owned by the subscriber. When help is needed, the button is pressed and the Lifeline Communicator (within 200 feet) receives the wireless signal, captures the phone line (even if the telephone is off the hook), and sends a digital message to the Emergency Response Center where it is automatically printed.

At SEMC's Emergency Department, a staff member reads the subscriber code form the printed tape and retrieves the subscriber information card with name, address, telephone number, a brief statement of medical or physical problems, and a list of responders. These responders are designated by the subscriber at the time Lifeline is installed. Included are people with whom the subscriber is comfortable and who have indicated their willingness to respond in the event of an emergency. Also on the list are multiple response agencies, such as police and ambulance, which would be dispatched in the event that the volunteers were unavailable.

The Emergency Department nurse immediately places a call to the subscriber. If the subscriber can get to the telephone, the nurse evaluates what may be needed. The nurse can then determine the proper response having all the information in terms of subscriber's location and service needs. If the subscriber does not answer the phone, the nurse assumes an emergency. Immediate action is taken to contact a responder who can arrive on the scene quickly.

Lifeline equipment is closed-looped in its design. Several checks are built into the system to ensure its full operation through the responder's arrival at the scene. Additionally, the responder must send an "all clear" signal to the Response Center by pressing a reset button. Througnout the operation the subscriber receives feedback to reassure him that he is "in touch" with help.

In the event that the subscriber is unconscious and unable to press the reset button, a clock-timer in the Lifeline home unit will initiate an emergency call. The time is set for 12 or 24 hours. It is reset manually by the subscriber pushing a reset button on the unit. Lifting the telephone handset during normal use also automatically resets the timer. Monthly phone calls to the subscriber to test the system reinforces the feeling of being "in touch.' Operation Lifeline in its entirety reassures subscribers that they are never alone—they can get help if they need it.

PACIFIC NORTHWEST RURAL RECREATION DEVELOPMENT PROJECT (PNRRDP)

Introduction

Since 1981 the University of Colorado in Boulder has assisted rural Colorado communities in meeting their recreation needs through the Colorado Rural Recreation Directors Project (CRRDP). The CRRDP represents a partnership of corporate, local, state, and federal financial sponsorship which supports technical assistance, onsite leadership, training, education, and research. Each year a select number of communities are identified to participate in the project. Since its beginning, forty Colorado communities have participated in the CRRDP.

The purpose of this project proposal is to establish a duplicate program in the States of Oregon and Washington through the establishment of a Pacific Northwest Rural Recreation Development Project (PNRRDP) to be housed at Central Washington University with a branch at the University of Oregon.

Project Description

Just as the CRRPD developed in response to a growing demand for recreation services in rural Colorado communities, a similar demand is recognized in the rural communities within the States of Oregon and Washington. Using the model developed through the CRRDP, the PNRRDP, will implement a similar program of cooperation between the PNRRDP and Oregon and Washington rural communities at large. Each rural community is unique in its resources and its capabilities. The staff of the PNRRDP will work closely with community representatives to assess recreation needs and to determine the best possible approach to addressing those needs.

Each participating community will receive the services of a full time recreation director (University recreation major), who organizes a summer program and coordinates local resources in the community. In addition, two youth from the community are employed as recreation leaders on a full time basis. This local recreation staff plans and implements recreation activities for all age and interest groups and assists in establishing a support system for long range recreation development. It is anticipated that touring recreation specialists will provide clinics and demonstrations which are intended to expand upon a community's recreation offerings.

For this first year, the PNRRDP will attempt to initiate its programs in twelve communities, six in the state of Oregon and six in the state of Washington. Sites selected will fall within Pacific Northwest Bell service areas. It is hoped that the sites can be "clustered" to minimize the amount of travel involved. To minimize duplication of services it is proposed that the PNRRDP be housed at Central Washington University with Dr. S. Harold Smith, Professor, as Project Director and that the University of Oregon be contracted as a branch with Dr. Larry L. Neal, Associate Professor, as the

Assistant Project Director. Both Dr. Smith and Dr. Neal will be assisted by a 12 month graduate assistant and secretarial help. Resumes for Dr. Smith and Dr. Neal are found in the appendix.

Project Goals

The PNRRDP has five goals, all of which are specific to furthering the partnership of the local community and the University. These goals are:

1. To provide assistance to rural Pacific Nortnwest communities in meeting immediate recreation needs and in long term recreation development;

2. To provide an educational experience to University students pursuing a degree in recreation management;

3. To provide significant work experience and career development assistance to community youth eligible for the Job Training Partnership Act;

4. To identify the most effective methods to implement recreation services in rural communities;

5. To measure the impact of recreation services on the overall satisfaction of rural community life.

*Rural Recreation Development Model**

The development and success of the project are directly related to the implementation and use of the recreation development model for rural communities. This model is based upon the premise of external intervention. The model has been developed upon the observation and experience of the CRRDP. The model is constantly being applied, tested and contrasted with theoretical models of human and community development from other disciplines.

STEP 1
EXTERNAL INTERVENTION

A process of external intervention must be developed which clearly identifies the steps and approaches for providing technical assistance:

Project staff serves as surrogate staff;

Establish research and evaluation components;

Identify external resources-state, regional, and national;

Begin informal/formal meetings between Project staff and community representatives;

* Rural Recreation Development Model was developed by and is the property of the Colorado Rural Recreation Directors Project, Dr. Pat Long, Director, University of Colorado-Boulder.

Begin educational process of what recreation is, why it is important, and how the support system can be implemented;

Identify communities needing assistance;

Solicit requests for assistance from communities;

Provides immediate technical assistance on special recreation projects;

Hire and train a summer recreation director for each of the participating communities.

STEP 2
LOCAL MOTIVATION AND INITIATIVE

Local motivation and initiative results from:

Self interest of a special interest group such as a teen parents group or senior citizens;

Perceived need for a facility such as a teen center, park, playground, or tourist attraction;

Occurrence of a significant event such as a drowning, drug, or alcohol incident.

Local leaders commit time and energy.

Community representatives request outside assistance or apply for outside financial support.

STEP 3
AWARENESS/NEEDS ASSESSMENT

Establish a steering committee or an informal recreation council.

Determine all existing services. programs, and activities, and who sponsors them, that are available in the community.

Assess all of the human, physical, and financial resources potentially available for recreation.

Begin public information and public relations on recreation and create general awareness of program.

Begin to identify broader recreation needs, wants, opportunities, and solutions, appropriate to the community.

Offer new alternatives of recreation pursuits in addition to traditional sports and facilities.

STEP 4
PROGRAM IMPLEMENTATION

Obtain formal sanction from appropriate governmental unit(s).

Activate local human, physical, and financial resources for initiation of program operation.

Begin recreation services:

- Youth programs;
- Special event;
- Limited-time sessions to stimulate interest but without long-term commitment of participants;
- Balance traditional, acceptable offerings with recreation opportunities.

Broaden community involvement through:

- Program participation;
- Program sponsorship;
- Use of local instructors;
- Coordination of new offerings with existing services.

Keep local officials informed of program development.

Continue public information and public relations.

Continue to identify local, state, regional and national resources.

STEP 5
FORMALIZATION OF RECREATION SYSTEM

Formalize recreation council.

Explore and select alternatives of sponsorship including cooperative agreements/arrangements;

- Non-profit status;
- School/town/county sponsorship;
- Multi-town support;

Private industry and community sponsorship.

Explore financial support options and begin securing the support of:

Recreation district;

City/county general fund support;

Private/corporate sponsorship.

Identify central staff who is responsible for recreation system.

Existing services are supported and a commitment made by recreation council/staff to expand recreation services to the total community.

Continue public information and public relations.

STEP 6
EXPANSION AND EVALUATION

Establish system of on-going program evaluation with input from participants, leaders, spectators, and general public.

Re-assessment of priorities by recreation council and staff based upon program success and feedback from community residents.

Expand program offerings;

To other age and interest groups;

To include more variety of activities and format

Program information is shared both within the community and with other communities.

Continue public information and public relations.

STEP 7
ANNUALIZATION AND ENHANCEMENT

Basic programming needs are being met and focus is now placed upon;

Special populations;

Transportation problems;

Facility development;

Private/public relationships.

Formal recreation council and continues year-round

Integration of recreation system with other community systems

Financial Support

Besides the direct partnership with individual communities and their residents, the PNRRDP will solicit support of the Rural Recreation Project within each state. It will be the responsibility of each of the Universities to develop these relationships within their respective state. Agencies to be contacted include:

—Office of Rural Job Training (Job Training Partnership Act)

—Pacific Northwest Bell (Oregon & Washington)

—State Council of Governments

—State Council on the Arts and Humanities

—State Tennis Association; United States Professional Tennis Association (USPTA)

—Washington State Parks; Oregon State Parks

The attached budget and budget narrative details the anticipated financial support for the first year of the project (see attached).

Project Services

Each participating community receives the following services:

1. A full time recreation director (University recreation major) for the summer months (12 weeks). This person is selected by the PNRRDP and matched with the local community. The director is placed in the community setting but spends time during the first and twelfth weeks participating in Project training and evaluation sessions;

2. Two full-time youth recreation leader positions to be filled by local youth who are eligible for the Job Training Partnership Act employment program. These youth are hired and supervised by the recreation director and work a maximum of 300 hours for the summer. The youth attend a special recreation leader training program conducted by the PNRRDP;

3. Select recreation specialists who offer clinics and workshops in the participating communities. These recreation specialists may include USPTA certified tennis professional, visual and performing artists, fitness specialists and certified New Games Leader;

4. Technical assistance from members of the PNRRDP staff and access to all available information specific to recreation development in rural communities;

5. A planning visit by the prospective recreation director to the assigned community to become familiar with the community and to establish preliminary contacts.

Community Contribution

Each participating community is expected to provide the following:

1. Local sponsorship of the PNRRDP through appropriate formal action of the sponsoring governing body;

2. General liability coverage of an amount normal to the existing coverage for other governing body services which provides liability protection for any and all volunteer and paid recreation staff to include the youth recreation leaders and the recreation director;

3. Acceptable housing for the recreation director or a housing stipend in the amount sufficient to secure acceptable housing within the community;

4. Adequate office facilities for the recreation director and the youth recreation leaders with telephone access and a limited long distance budget, ($50 for summer);

5. A minimum of $300 to initiate recreation services and to cover miscellaneous program expenses;

6. A public relations and duplication budget of $75;

7. Approval to conduct a needs assessment, follow up surveys, and/or research specific to the benefits of recreation development in rural communities (such efforts are presented for review prior to their implementation).

Training and Evaluation

There are two training components to the PNRRDP. The recreation directors selected for the Project attend a 3 day training session directed specifically at living and working in a rural community. This training supplements the formal degree program in recreation and focuses on service development in rural communities, supervision of youth recreation leaders, and resources available through the Project.

The second workshop allows the youth recreation leaders the opportunity to develop an understanding of recreation and the role it plays in the community. Each participant becomes certified in standard first aid, learns to plan and implement different activities and programs, develop personal leadership skills, becomes familiar with age group characteristics and recreation needs, participates in communication and decisionmaking exercises, and develops skills in specific recreation activities.

These two workshops will go on concurrently at the same training site that will be convenient to both State's personnel.

A third evaluation workshop will be conducted during the last week of the summer program.

A supplemental budget is presented to take advantage of the training and expertise of the CRRDP in these training and evaluation sessions. It is hoped that PNB will forward this supplemental budget to U.S. West so that appropriate liaisons can be made between the CRRDP and the PNRRDP. (see appendix)

Youth Recreation Leader Competencies

Each JTPA eligible youth participating in the PNRRDP is expected to develop his or her skills in four competency areas. Training and experience are provided for the youth in each of the four competency areas with regular opportunity for feedback. The four areas and select examples of each follows:

Pre-Employment Skills

—Opportunity is provided to view a video entitled "The Job Game" specifically prepared for youth entering the job market.

—A recreation leader job application specific to job expectations is completed by each youth.

—Applicant is required to personally interview for the recreation leader position.

—During training, experience is gained in developing a resume and a qualifying letter

Work Maturity Skills

—Weekly work evaluation interview is conducted between the youth recreation leader and the recreation director (work-site supervisor).

—Evaluation documentation is prepared by the supervisor for the youth recreation leaders file following the evaluation interview.

—Personal statements by the youth recreation leader concerning growth and change resulting from the summer work experience are compiled at the end of the summer.

Basic/Academic Skills

—Certification is received in Basic First Aid.

—Organizational skills are developed in program planning and program implementation.

—Writing skills are developed by preparing news releases and public information documents.

—Personal leadership skills are developed through actually leading activities and programs.

Job Specific Skills (determined by age, maturity, and community). Each youth may be provided the opportunity to:

—Assess participant needs in recreation.

—Develop goals and objectives for recreation programs.

—Design recreation programs.

—Conduct recreation programs.

—Conduct program evaluation.

—Respond to patron or participant complaints.

—Prepare budget for recreation programs.

—Develop schedule for recreation activities.

—Participate in staff meetings.

—Organize special events.

—Use marketing techniques to "sell" programs.

—Determine actual fees and charges.

—Maintain records of expenses.

—Interpret agency purpose to public at large.

—Inspect recreation areas for safety.

Benefits to the Youth Recreation Leaders

The major benefits of the youth recreation leader experience include 1). Personal growth and maturity through the opportunity to assume significant responsibility for a visible community program; 2). the development and reinforcement of positive work traits applicable to any work environment; 3). the acquisition of specific skills in the planning and implementation of recreation programs and activities; and 4). a sense of job and career that aid in giving direction to future vocational education planning.

In assessing the impact of the CRRDP experience on the youth recreation leaders, it was determined by the recreation directors (work-site supervisors) that: 1). this because of the varied set of responsibilities available to them; 2). the vast majority of youth respond to the channels presented; 3). the content and format of the JTPA youth recreation leader training is appropriate and correct; and 4). the responsibilities, the experiences, and the outcomes for the JTPA youth involved in the Rural Recreation Project seem usually well-suited to the aims and objectives of the JTPA youth program.

Conclusion

The services ovided in each community will vary with the recreation needs and the level of recreation awareness and program development in each individual town. The recreation director placed in each community offers programs and services by acting as a program facilitator to coordinate local human, financial, and physical resources. Low-cost, life-long activities are the focus of local programming, and the needs of each age group, from preschoolers to senior citizens are addressed.

The characteristics which make each rural town unique are recognized and accounted for in the flexible approach of the Project. Through local involvement and support the residents of each community actively participate in the decisions necessary to successfully implement a community wide recreation system.

Because of the significance of this proposal it is requested that PNB consider the funding of the project for a minimum of two years. The Funding level for the first year of the project at the amount herein requested: $50,434.00. The funding level for the second year not to exceed the level for the first year but to be negotiated at the completion of the first years project.

Budget
Pacific Northwest Rural Recreation Development Project

ITEM	SOURCE CWU	SITES	JTPA	PNB	TOTAL
SALARIES AND WAGES					
PROJECT DIRECTOR, Dr. Harold Smith					
9 mos. @ 10% FTE				2975	2975
1 summer mo. @ 100%	3305				3305
2 summer mos. @ 100%				6609	6609
WASHINGTON STATE SITE COORDINATOR					
CWU Graduate Assistant, 12 mos.				7500	7500
SECRETARIAL SUPPORT, 12 mos. @ 25% FTE				3500	3500
TOTAL SALARIES AND WAGES	3305			20584	23889
STAFF BENEFITS					
12889 @ 25% (Project Director)	826			2396	3222
7140 @ 2% (Student)				150	150
3500 @ 29% (Secretary)				1015	1015
TOTAL STAFF BENEFITS	826			3561	4387
CONSULTANT AND CONTRACT SERVICES					
UNIVERSITY OF OREGON, PER ATTACHED (U of Oregon local contribution: $2670)				13248	15918
PROGRAM EVALUATION (12 sites @ $360)				3600	3600
TOTAL CONSULTANT AND CONTRACT SERVICES				16848	19518
TRAVEL AND PER DIEM					
Washington Site Coordinators				1500	1500
Project Director				1000	1000
Housing and Meals, Training, 36 trainees @ $100				3600	3600
TOTAL TRAVEL AND PER DIEM				6100	6100
SUPPLIES					
Promotional Materials	1000			3000	4000
Office supplies, telephone, postage	400			250	650
Computer access	1000				1000
TOTAL SUPPLIES	2400			3250	5650
EQUIPMENT					
Office space and equipment	4770				4770

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Budget
Pacific Northwest Rural Recreation Development Project

ITEM	SOURCE CWU	SITES	JTPA	PNB	TOTAL
OTHER					
SITE COSTS. 6 WASHINGTON, 6 OREGON SITES:					
Site Directors, 12 @ $2000			24000		24000
Site personnel travel, 3 persons/site, 12 sites @ $650			7800		7800
JTPA Youth Salaries, 300 hrs. @ $3.45 × 24 persons			24120		24120
Site housing, 12 @ $300		3600			3600
Site office space, $200/month × 3 months × 12 sites		7200			7200
Telephone, 12 @ $50		600			600
Liability Insurance, 12 @ $150		1800			1800
Duplication, 12 @ $50		600			600
Program Budget, 12 @ $300		3600			3600
Public Relations, 12 @ $25		300			300
TOTAL OTHER		17700	55920		73620

	O OF ORE	CWU	SITES	JTPA	PNB	TOTAL
TOTAL DIRECT COSTS	2670	11301	17700	55920	50343	137934
INDIRECT COSTS @ 8% TOTAL DIRECT COSTS		7008			4027	11035
TOTAL COSTS	2670	18309	17700	55920	54370	148969

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Budget
Pacific Northwest Rural Recreation Development Project

	SOURCE		
ITEM	U OF ORE	PNB-CWU	TOTAL
SALARIES AND WAGES			
Assoc. Director, Dr. Larry Neal, 9 mos. @ .05 FTE		1570	1570
Oregon Site Coordinator, U of Ore. Grad. Ass't		7500	7500
Secretarial support, Work Study, 12 mos. @ .10		1500	1500
STAFF BENEFITS			
1570 @ 25%		393	393
7500 @ 2%		150	150
1500 @ 29%		435	435
TRAVEL			
Oregon Site Coordinator		1500	1500
SUPPLIES			
Promotional Materials	500		500
Office supplies, telephone, postage	170	200	370
EQUIPMENT			
Office space and equipment	2000		2000
TOTAL UNIVERSITY OF OREGON SERVICES	2670	13248	15918

BUDGET NARRATIVE

I. Personnel

A. Project Director—The Project Director will be Dr. Harold Smith of the Leisure Services Program at Central Washington University. The budgeted amount will cover .40 FTE to be used in the following manner. .10 FTE for the 9 months of the academic year. 1.0 FTE for the 3 months in the summer with one month salary being provided by CWU for supervision of CFE students (Recreation Director) and two months salary being requested of PNB. This arrangement will allow Dr. Smith to devote 10% of his time during the academic year and 100% of his time during the summer to the Rural Recreation Project.

B. Washington Site Coordinator—The Washington Site Coordinator will be a graduate assistant working directly with the Project Director. This person will work directly with the communities in site selection and program coordination. The funds requested will provide a Graduate Assistantship for the twelve month period of the project. It is anticipated that an individual with experience as a recreation director with the CRRDP will fill this position allowing the PNRRDP to use the experience while also providing the individual the opportunity to work on a graduate degree.

C. Secretarial Support—This line provides for a .25 FTE for secretarial support. This support will come from the secretarial pool within the Department of Physical Education, Health and Leisure Services.

Fringe Benefits—These lines provide fringe benefits for CWU related personnel. Fringe benefits are calculated at the following %'s: Project Director 25% of salary, Secretarial, 29% of salary, Graduate Assistant 2% of salary.

II. Contractual

To be contracted with the University of Oregon, Institute of Recreation Research and Service.

A. Assistant Project Director—The Assistant Project Director will be Dr. Larry Neal the Director of the University of Oregon, Institute of Recreation Research and Service. Project services within the State of Oregon will be contracted to the Institute. This line provides for .05 FTE of Dr. Neal during the academic year. It will be his responsibility to oversee and implement the Rural Recreation Project in Oregon.

B. Oregon Site Coordinator—The Oregon Site Coordinator will be a graduate assistant or equivalent at the University of Oregon. This person will work directly with the Assistant Project Director to make contact with the communities in site selection and program coordination.

C. Secretarial Support—This line provides secretarial support at the University of Oregon in the form of a work study individual.

Fringe Benefits—These lines provide fringe benefits for the University of Oregon contracted personnel.

III. Program

A. Site costs

1. Recreation Directors Stipend—Each of the recreation directors (12) will be paid a stipend of $2,000 for 12 weeks of service. This stipend will come through the JTPA as work site supervisors. Negotiations with the individual JTPA vendors will begin as soon as funding is assured.

2. Travel/Training Expenses—Each site will have approximately $650.00 to send the recreation director and two youth recreation leaders to the Project Training and Evaluation Sessions. These funds will be negotiated with the JTPA Vendors.

3. Youth Salaries—Each of the Youth Recreation Leaders (2 per site) will be paid minimum wage for up to 300 hours of work during the summer. These funds will be negotiated with the JTPA Vendors.

4 & 5. Individual Site Costs to the Communities. The individual communities will be responsible for each of these items (at a minimum) either through goods or services.

B. Operations and Management

1.- 9. Individual itemization of Project operations and management costs indicating the share of each major provider. It should be emphasized that all training, printed and promotional materials will carry the PNB logo of sponsorship.

IV. Indirect Costs: Indirect Cost figured at an 8% rate of Direct Cost

V. Training and Consultation

A supplementary budget submitted to U.S. West through PNB to receive assistance from the CRRDP to the PNRRDP in the form of training and consultation. It is felt that this liaison is greatly needed to properly implement the Rural Recreation Project into the Pacific Northwest.

SUPPLEMENTAL FUNDING REQUEST

Training & Consultation Budget
(to be requested through PNB to US West)

	TOTAL
I. Training and Consultation	
A. Project Director and Site Coordinator Training (one week at Colorado Project site Director's Training)	
1. Travel (Rt. Airfare x 3 $250)	$ 250.00
2. Meals & Lodging ($100/day x 3 x 6)	$ 1,800.00
3. Training Materials	$ 200.00
B. Consultation (CRRDP to PNRRDP Project)	
1. Travel	
a. Colorado Staff Member to PNW Project Site Director's Training	$ 350.00
b. CSM to PNWP Evaluation Session	$ 350.00
c. Two Additional Consultation/Evaluation Visits 2 $350.00	$ 700.00
2. Evaluation Session (Housing & Lodging)	
a. $100/person x 36	$ 3,600.00
3. Project Information and Training Materials	$ 1,000.00
4. Telephone	$ 100.00
5. Postage	$ 100.00
6. Printing/Duplication	$ 200.00
7. Consultation Services	
a. $200/day x 5	$ 1,000.00
TOTAL	$10,150.00

It is recommended that this be granted
through the PNRRDP to be contracted with CRRDP.

RESUME

S. HAROLD SMITH, Ph.D.

EDUCATION

Doctor of Philosophy	University of Utah, 1974 (Leisure Studies)
Master of Science	University of Washington, 1968 (Physical Education)
Bachelor of Science	Brigham Young University, 1967 (Physical Education)

PROFESSIONAL EXPERIENCE

Nineteen years of professional experience to include:

Professor & Graduate Coordinator (present)	Leisure Services Program Department of PEHLS Central Washington University
Associate Professor & Department Chair (1980–83)	Professional Program in Recreation Resources University of Wisconsin—Green Bay
Director & Project Director (1977–80)	Center of Leisure Studies Project EXTEND-ED University of Oregon

PROFESSIONAL ACTIVITIES AND SERVICES

President Elect	American Association of Leisure and Recreation, Reston, VA
Managing Editor	*Leisure Today*
Board Member	Washington Recreation & Parks Association
Member	Of over 30 other Boards and Commissions over the past 19 years. Chair of three.
Presentor	At over 100 training sessions and professional workshops
Author	Of over 25 articles, manuscripts and monographs

LARRY L. NEAL—BRIEF VITA

DR. LARRY L. NEAL, Associate Professor and Asst. Head
Department of Leisure Studies & Services, College of Human Development & Performance
University of Oregon, Eugene, Or. 97403

FORMAL EDUCATION:

University of Oregon, College of Health, Physical Education & Recreation; Recreation & Park Management—1969, 1962, and 1961—for D.Ed., M.S., and B.S. respectively.

Lewis & Clark College, Portland, Oregon (Liberal Arts); 1958–60.

PROFESSIONAL EXPERIENCE:

Asst. Head and Associate Professor, Department of Leisure Studies & Services (1986 on); Director, Institute of Recreation Research & Service (1980–86); Head, Dept. of Recreation & Park Management (1975–80); Director, Center of Leisure Studies (1972–75).

Assistant Executive Secretary/Consultant—Recreation: AAHPER, Washington, D.C. (1971–72).

Director, Project EXTEND-ED; Assistant Professor, Department of Recreation & Park Management (1969–71).

Research Fellow, Rehabilitation Research & Training Center in Mental Retardation, University of Oregon (1967–69).

Instructor, Department of Recreation & Park Management, University of Oregon (1965–67).

Director, Parks & Recreation Department, Vancouver, Washington (1962–65).

ORGANIZATION MEMBERSHIPS/LEADERSHIP:

National Recreation & Park Association [NRPA] (1959–on); Society of Park and Recreation Educators [SPRE] Board (1980–83); Council on Accreditation [NRPA/AALR] (1978–80, 1984–86), vice chair '86; National Therapeutic Recreation Society [NTRS] Board (1972–75).

American Alliance for Health, Physical Education, Recreation & Dance [AAHPERD] Life member (1970–on); American Association for Leisure & Recreation [AALR] (1970–on), Board (1982–85), President, (1983–84); Chair, Scholar Lecture Committee (1978–81); Chairman, AALR Student Literary Award Program (1984–on); **Leisure Today** Board (1970–on).

Phi Epsilon Kappa [PEK], (1960–on); Life member.

Washington Recreation and Park Assn. & California Park and Recreation Society, (1959–on).

Oregon Park and Recreation Society (1960–on); Board & President (1974–76).

National Community Education Assn., Washington, D.C., Charter & Life member (1968–on).

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CONSULTANCIES, GRANTS & REVIEWER RESPONSIBILITIES:

Consultant or guest lecturer to over forty colleges and universities; also having traveled to Canada, Central America, Denmark, England, Japan, The Netherlands, South Korea, and Sweden; with trips planned for Australia and The Peoples Republic of China.

Consultant to six national firms and agencies.

Grant writer of in excess of half a million dollars—International, Federal, State & Foundation.

Guest reader/reviewer of select manuscripts for five publishers; four professional journals and the government's federal review panels (five years).

PUBLICATIONS:

Author and/or Co-author of over seventy-five articles, monographs, books, reports, book reviews, and chapters in books.

AWARDS & HONORS:

Recipient of twelve awards, scholarships and certificates of national recognition.

B

APPENDIX

List of State Liaison Officers for Land and Water Conservation Fund Monies

State	Type	Contact	Address	State	Zip	Region	Phone
Alabama	SLO	Mr. Charles D. Kelley Commissioner	Dept. Conservation & Natural Resources 64 N. Union Street Montgomery	AL	36130	SERO	205-032-0301
Alabama	ALT	Mr. Sidney B. Bledsoe Director	State Park Div., Dept. Cons. & Nat. Resources 64 N. Union Street Montgomery	AL	36130	SERO	205-261-3334
Alabama	ALT	Mr. J.C. Strickland Supervisor	Recreation Plng. & Grant Programs Section Dept. Cons. & Nat. Resources, 64 N. Union St. Montgomery	AL	36130	SERO	205-261-3154
Alaska	SLO	Mr. Neil C. Johannsen Director	Div. Parks & Outdoor Recreation Pouch 7001 Anchorage	AK	99510	ARO	907-762-4505
Alaska	ALT	Mr. Jimmie L. Price Chief	Admin. Servs., Div. Parks & Out. Recreation Pouch 7001 Anchorage	AK	99510	ARO	907-762-4504
Amer. Samoa	SLO	Mr. William Satele Director	Department of Parks & Recreation Government of Samoa Pago Pago	AS	96799	WRO	OVR-633-1191
Amer. Samoa	ALT	Mr. Stan Sorensen	Department of Parks & Recreation Government of Samoa Pago Pago	AS	96799	WRO	OVR-633-1191
Arizona	SLO		State Planning & Coord., AZ State Parks 1688 West Adams Phoenix	AZ	85007	WRO	602-255-4174
Arizona	ALT	Mr. Wayne L. Shuyler Planning Dir.	Arizona State Parks 1688 West Adams Phoenix	AZ	85007	WRO	602-255-4174

Arkansas	SLO	Ms. Jo Luck Wilson Director	Arkansas Dept. of Parks & Tourism 1 Capitol Mall Little Rock	AR	72201	SWRO	501-371-2535
Arkansas	ALT	Ms. Barbara W. Heffington	Arkansas Department of Parks & Tourism 1 Capitol Mall Little Rock	AR	72201	SWRO	501-371-1301
California	SLO	Mr. William S. Briner Director	Department of Parks & Recreation P.O. Box 2390 Sacramento	CA	95811	WRO	916-445-2358
California	ALT	Mr. J. Warren Gardner Supervisor	Federal Grants Sect., Dept. Parks & Recreation P.O. Box 2390 Sacramento	CA	95811	WRO	916-322-9576
California	ALT	Mr. Russell W. Porter Depy. Director	Dept. of Parks and Recreation P.O. Box 2390 Sacramento	CA	95811	WRO	916-445-0835
Colorado	SLO	Mr. Ron G. Holliday Director	Div. Parks & Out. Rec., Dept. Nat. Resources 1313 Sherman St., Rm 618 Denver	CO	80203	RMRO	303-866-3437
Colorado	ALT	Mr. Ralph Schell	Div. Parks & Out. Rec., Dept. Nat. Resources 1313 Sherman St., Rm 618 Denver	CO	80203	RMRO	303-866-3064
Connecticut	SLO	Mr. Stanley J. Pac Commissioner	Department of Environmental Protection 165 Capitol Avenue Hartford	CT	06106	MARO	203-566-2118
Connecticut	ALT	Mr. Charles Reed Director	Land Acq. & Managt; Dept. Envir. Protection 165 Capitol Avenue Hartford	CT	06106	MARO	203-566-2904

Delaware	SLO					302-736-4403
Mr. John E. Wilson, III Secretary		Dept. Nat. Res. & Environmental Control 89 Kings Hwy., Box 1401 Dover	DE	19901	MARO	
Delaware	ALT					302-736-5284
Mr. William J. Hopkins		Div. Parks & Rec., Dept. Nat. Res. & Envir. Cont. 89 Kings Hwy., Box 1401 Dover	DE	19901	MARO	
Dist. Columbia	SLO					202-673-7665
Ms. F. Alexis H. Roberson Director		D.C. Department of Recreation 3149 16th ST., N.W. Washington	DC	20010	MARO	
Florida	SLO					904-488-6131
Mr. Ney C. Landrum Director		Div., Rec. & Parks, Dept. Nat. Resources 3900 Commonwealth Blvd. Tallahassee	FL	32303	SERO	
Georgia	SLO					404-656-3500
Mr. J. Leonard Ledbetter Commissioner		Dept. of Natural Resources 205 Butler St., S.E., Suite 1252 Atlanta	GA	30334	SERO	
Georgia	ALT					404-656-3500
Mr. Lonice Barrett Exec. Asst.		Admin. Affairs, Dept. Nat. Resources 205 Butler St., S.E., Suite 1252 Atlanta	GA	30334	SERO	
Georgia	ALT					404-656-3830
Mr. Burt Weerts Supervisor		Funding Unit, Department of Natural Resources 205 Butler St., S.E., Suite 1252 Atlanta	GA	30334	SERO	
Guam	SLO					OVR-477-7825
Mr. John T. Palomo Director		Dept. of Parks & Recreaton P.O. Box 2950 Agana	GU	96910	WRO	
Hawaii	SLO					808-548-6550
Mr. Ono Susumu Chairman		Dept. Land & Natural Resources P.O. Box 621 Honolulu	HI	96809	WRO	

Hawaii Mr. Ralston Nagata	ALT	St. Parks Administrator, Dept. Land & Nat. Res. P.O. Box 621 Honolulu	HI	96809	WRO	808-548-7455
Hawaii Mr. Edgar Hamasu Depy. Chairman	ALT	Dept. Land & Nat. Resources P.O. Box 621 Honolulu	HI	96809	WRO	808-548-6550
Idaho Mr. Robert L. Meinen	SLO	Idaho Parks & Recreation Department Statehouse Mail Boise	ID	83720	PNWRO	208-334-2154
Illinois Mr. Michael B. Witte Director	SLO	Dept. of Conservation Lincoln Towers, S. 425, 524 S. 2nd. St. Springfield	IL	62706	MWRO	217-782-6302
Illinois Mr. John W. Comerio Director	ALT	Office Plng. & Dev., Dept. of Conservation Lincoln Towers, S. 400, 524 S. 2nd. St. Springfield	IL	62706	MWRO	217-782-1807
Indiana Mr. James M. Ridenour Director	SLO	Dept. of Natural Resources 608 State Office Building Indianapolis	IN	46204	MWRO	317-232-4020
Indiana Mr. John T. Costello Depy. Director	ALT	Bur. Land, Forests & Wildlife, Dept. Nat. Res. 608 State Office Building Indianapolis	IN	46204	MWRO	317-232-4021
Indiana Mr. Gerald J. Pagac Director	ALT	Div. Out. Rec., Dept. of Natural Resources 605 State Office Building Indianapolis	IN	46204	MWRO	317-232-4070
Iowa Mr. Larry J. Wilson Director	SLO	Iowa Conservation Commission Wallace State Office Bldg., E. 9th & Grand Des Moines	IA	50319	MWRO	515-281-5385

Iowa	ALT				515-281-5631
Ms. Berniece Hostetler Supt.		Grants in Aid, Iowa Conservation Commission Wallace State Office Bldg., E. 9th & Grand Des Moines	IA	50319	MWRO
Kansas	SLO				913-296-2281
Mr. Lynn Burris, Jr. Director		Kansas State Park & Resources Authority P.O. Box 977 Topeka	KS	66601	MWRO
Kentucky	SLO				502-564-2382
Mr. Richard D. Cole Commissioner		Dept. of Local Government Capital Plaza Tower, 2nd. Floor Frankfort	KY	40601	SERO
Kentucky	ALT				502-564-2382
Mr. Robert E. Flynn Director		Div. of Dev. Finance, Dept. of Local Govt. Capital Plaza Tower, 2nd. Floor Frankfort	KY	40601	SERO
Louisiana	SLO				504-925-3830
Dr. Gerald Guidroz Asst. Secy.		State Parks, Dept. Cult., Rec. & Tour. P.O. Drawer 1111 Baton Rouge	LA	70821	SWRO
Louisiana	ALT				504-925-3830
Mr. Wylie J. Harvey		Dept. of Culture, Recreation & Tourism P.O. Drawer 1111 Baton Rouge	LA	70821	SWRO
Maine	SLO				207-289-3821
Mr. Herbert W. Hartman Director		Bureau of Parks & Recreation Statehouse Station 22 Augusta	ME	04333	MARO
Maine	ALT				207-289-3821
Mr. John W. Picher		Bureau of Parks & Recreation Statehouse Station 22 Augusta	ME	04333	MARO
Maryland	SLO				301-269-3947
		Capital Progs., Dept. Nat. Resources 2012 Industrial Dr. Annapolis	MD	21401	MARO

Maryland	ALT	Mr. William A. Krebs	Director	Program Open Space, Capital Progs. Admin.	2012 Industrial Dr.	Annapolis	MD	21401	MARO	301-269-2231
Maryland	ALT	Mr. Roland E. English III	Chief, Dev. Plng	Maryland Dept. of State Planning	310 W. Preston St.	Baltimore	MD	21201	MARO	301-225-4550
Massachusetts	SLO	Mr. James S. Hoyte	Secy.	Office Envir. Affairs, Dept. Envir. Management	100 Cambridge St.	Boston	MA	02202	MARO	617-727-9800
Massachusetts	ALT	Ms. Deborah V. Howard	Sr. Asst. Secy.	Office Envir. Affairs	100 Cambridge St.	Boston	MA	02202	MARO	617-727-3183
Michigan	ALT	Mr. Rufus S. Anderson	Depy. Director	Michigan Dept. of Natural Resources	P.O. Box 30028	Lansing	MI	48909	MWRO	517-373-2682
Michigan	ALT	Mr. Joseph Seavey	Chief	Rec. Serv. Div., Michigan Dept. of Nat. Resources	P.O. Box 30028	Lansing	MI	48909	MWRO	517-373-1660
Minnesota	SLO	Ms. Karen Loechler	Asst. Commsr.	Planning & Special Progs., Dept. Nat. Resources	500 Lafayette Rd., Box 51	St. Paul	MN	55146	MWRO	612-296-9556
Minnesota	ALT	Mr. Robert F. Benner	Depy. Commsr.	Dept. Energy & Economic Development	900 America Center, 150 E. Kellogg Blvd.	St. Paul	MN	55101	MWRO	612-297-2515
Mississippi	SLO	Mr. Aubrey D. Rozzell	Director	Rec. & Parks, Dept. of Natural Resources	P.O. Box 10600	Jackson	MS	39209	SERO	601-961-5240

Mississippi	ALT				601-961-5244
Mr. Jimmy Graves Director		Out. Rec. Grants, Dept. of Nat. Resources P.O. Box 10600 Jackson	MS	39209	SERO
Missouri	SLO				314-751-4422
Dr. Frederick A. Brunner Director		Dept. of Natural Resources P.O. Box 176 Jefferson City	MO	65102	MWRO
Missouri	ALT				314-751-9392
Mr. Wayne E. Gross Director		Div. Parks, Rec. & HP, Dept. Nat. Res. P.O. Box 176 Jefferson City	MO	65102	MWRO
Missouri	ALT				314-751-8560
Dr. Deirdre K. Hiner Director		Out. Rec. Asst. Prog., Dept. Nat. Resources P.O. Box 176 Jefferson City	MO	65102	MWRO
Montana	SLO				406-444-3750
Mr. Donald D. Hyyppa Administrator		Parks Div., Dept. Fish, Wildlife & Parks 1420 East 6th Avenue Helena	MT	59601	RMRO
Montana	ALT				406-444-3750
Ms. Gretchen Olheiser Chief		Plng. & Proj. Bur., Dept. Fish, Wild. & Pks. 1420 East 6th Avenue Helena	MT	59601	RMRO
Nebraska	SLO				402-464-0641
Mr. Eugene T. Mahoney Director		Nebraska Game & Parks Commission 2200 N. 33rd. St., P.O. Box 30370 Lincoln	NE	68503	MWRO
Nebraska	ALT				402-464-0641
Mr. Oliver E. Wolff Administrator		Federal Aid, Nebraska Game & Parks Commission 2200 N. 33rd. St., P.O. Box 30370 Lincoln	NE	68503	MWRO
Nebraska	ALT				402-464-0641
Mr. Dale R. Bree Asst. Director		Nebraska Game & Parks Commission 2200 N. 33rd. St., P.O. Box 30370 Lincoln	NE	68503	MWRO

Nevada	SLO					702-885-4370
Mr. John Richardson Administrator		Division of State Parks Capital Complex Carson City	NV	89710	WRO	
Nevada	ALT					702-885-4370
Mr. Stephen J. Weaver Asst. Admin.		Division of State Parks Capital Complex Carson City	NV	89710	WRO	
New Hampshire	SLO					603-271-2411
Mr. John T. Flanders Commissioner		Dept. of Resources & Economic Dev. P.O. Box 856 Concord	NH	03301	MARO	
New Hampshire	ALT					603-271-3254
Mr. Wilbur F. LaPage Director		Div. Parks & Rec., Dept. Res., & Econ. Dev. P.O. Box 856 Concord	NH	03301	MARO	
New Hampshire	ALT					603-271-2155
Mr. Joseph Quinn Director		Rec. Services Office, Dept. of Res. & Econ. Dev. P.O. Box 856 Concord	NH	03301	MARO	
New Jersey	SLO					609-292-2885
Ms. Helen C. Fenske Asst. Commsr.		Natural Resources Dept. of Envir. Protection, CN 402 Trenton	NJ	08625	MARO	
New Jersey	ALT					609-292-2455
Mr. Dennis B. Davidson Director		Parks, Recreation & Green Acres Dept. of Envir. Protection, CN 404 Trenton	NJ	08625	MARO	
New Mexico	SLO					505-827-7830
Mr. Leo Griego Cabinet Secy.		Natural Resources Department 119 Villagra Bldg., Rm. 121 Santa Fe	NM	87503	SWRO	
New Mexico	ALT					505-827-7818
Ms. Joan T. Ellis Director		Admin. Services Div., Natural Resources Dept. 119 Villagra Bldg., Rm. 110 Santa Fe	NM	87503	SWRO	

New York	SLO	Mr. Orin Lehman Commissioner	Office of Parks & Recreation Bldg., #1, Empire State Plaza	Albany	NY	12238	MARO	518-474-0468
New York	ALT	Mr. Vincent Stallone, Jr. Director	Management Systems, Office of Parks & Rec. Bldg. #1, Empire State Plaza	Albany	NY	12238	MARO	518-474-0427
New York	ALT	Mr. Joseph V. McCartin Depy. Commsr.	Admin. & Fiscal Affairs, Office of Parks & Rec. Bldg. #1, Empire State Plaza	Albany	NY	12238	MARO	518-474-0439
No. Mariana Is.	SLO	Mr. Nicholas M. Leon Guerrero Director	Natural Resources, Capital Hill Comwlth. Northern Mariana Islands	Saipan, No. Marian	CM	96950	WRO	OVR9830/9834
North Carolina	SLO	Mr. S. THomas Rhodes Secretary	Dept. Nat. Resources & Community Dev. P.O. Box 27687	Raleigh	NC	27611	SERO	919-733-4181
North Carolina	ALT	Dr. Ernest A. Carl Depy. Secy.	Dept. Nat. Res. & Community Dev. P.O. Box 27687	Raleigh	NC	27611	SERO	919-733-4181
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North Dakota	ALT	Mr. Tim Mueller	Parks & Recreation Department 1424 West Century Ave., Suite 202	Bismarck	ND	58501	RMRO	701-224-4887
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Ohio	ALT				614-265-6395	
Mr. Wayne Warren Depy. Chief		Office Out. Rec. Servs., Dept. Natural Resources Fountain Square, Bldg. G-1 Columbus	OH	43224		MWRO
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Oklahoma	ALT				405-521-2980	
Mr. George Klopp		Div. of Plng. & Dev., OK Tourism & Rec. Dept. 500 Will Rogers Bldg. Oklahoma City	OK	73105		SWRO
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Mr. David G. Talbot		State Parks Administrator, Parks & Rec. Div. Dept. of Transp., 525 Trade St., S.E. Salem	OR	97310		PNWRO
Oregon	ALT				503-378-5000	
Mr. John E. Lilly Asst. Admin.		Plng. & Rivers, Parks & Rec. Div. Dept. of Transp., 525 Trade St., S.E. Salem	OR	97310		PNWRO
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Pennsylvania	SLO-LOC				717-787-7160	
Hon. Shirley M. Dennis Secretary		Dept. of Community Affairs P.O. Box 155 Harrisburg	PA	17120		MARO
Pennsylvania	ALT-ST				717-787-2869	
Mr. Patrick J. Solano Depy. Secy.		Res. Mangmt., Dept. Envir. Resources P.O. Box 1467 Harrisburg	PA	17120		MARO

State	Type	Contact	Title	Address	City	ST	ZIP	Region	Phone
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Rhode Island	SLO	Mr. Robert L. Bendick, Jr.	Director	Dept. of Environmental Management 9 Hayes St.	Providence	RI	02908	MARO	401-277-2771
Rhode Island	ALT	Mr. Calvin B. Dunwoody	Chief	Plng. & Dev., Dept. Envir. Management 22 Hayes St.	Providence	RI	02908	MARO	401-277-2776
South Carolina	SLO	Mr. Ronald R. Carter		Dept. Parks, Rec. & Tour., Edgar A. Brown Bldg. 1205 Pendleton St., Suite 113	Columbia	SC	29201	SERO	803-734-0147
South Dakota	SLO			Div. Parks & Rec., Dept. Game, Fish & Parks Sigurd Anderson Bldg.	Pierre	SD	57501	RMRO	605-773-3387
South Dakota	ALT	Mr. Doug Hofer	Asst. Director	Tech. Servs., Dept. Game, Fish & Parks Sigurd Anderson Bldg.	Pierre	SD	57501	RMRO	605-773-3391
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Tennessee	ALT	Mr. Gerald W. Dillehay	Chief	Rec. Services, Dept. of Conservation 701 Broadway, Customs House	Nashville	TN	37219-5237	SERO	615-742-6560

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Texas	ALT					512-479-4803
Mr. Roy L. Hogan Director		Admin. Services, Texas Parks & Wildlife Dept. 4200 Smith School Road Austin	TX	78744	SWRO	
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Utah	ALT					801-533-5356
Mr. Lyle T. Bennett		Department of Natural Resources 1636 West North Temple Salt Lake City	UT	84116	RMRO	
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Mr. Ross B. Elliott Exec. Director		Department of Natural Resources 1636 West North Temple Salt Lake City	UT	84116	RMRO	
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Vermont	ALT					802-244-7316
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Mr. Angel Luis LeBron Commissioner		Dept. Conservation & Cultural Affairs P.O. Box 4340, Charlotte Amalie St. Thomas	VI	00801	SERO	
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Mr. Gerald W. Pelton Chief		Plng. Servs., Inter. Agency Comm. Outdoor Rec. 4800 Capitol Boulevard, KP-11 Tumwater	WA	98504	PNWRO
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Mr. Fred Cutlip Director		Community Development, Room B-553 State Capitol Complex, Bldg. 6 Charleston	WV	25305	MARO
Wisconsin	SLO				608-266-0836
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Mr. Alvin F. Gastron Director		Wyoming Recreation Commission 122 West 25th. Cheyenne	WY	82002	RMRO
Wyoming	ALT				307-777-6308
Mr. Clifford E. Mikeseil Depy. Director		Wyoming Recreation Commission 122 West 25th. Cheyenne	WY	82002	RMRO