

**LOVELAND HISTORIC PRESERVATION COMMISSION
MEETING AGENDA
MONDAY, OCTOBER 20, 2014 6:00 PM
CITY COUNCIL CHAMBERS
500 E. THIRD STREET**

THE CITY OF LOVELAND IS COMMITTED TO PROVIDING AN EQUAL OPPORTUNITY FOR CITIZENS AND DOES NOT DISCRIMINATE ON THE BASIS OF DISABILITY, RACE, COLOR, NATIONAL ORIGIN, RELIGION, SEXUAL ORIENTATION OR GENDER. THE CITY WILL MAKE REASONABLE ACCOMMODATIONS FOR CITIZENS IN ACCORDANCE WITH THE AMERICANS WITH DISABILITIES ACT. FOR MORE INFORMATION, PLEASE CONTACT THE CITY'S ADA COORDINATOR AT BETTIE.GREENBERG@CITYOFLOVELAND.ORG OR 970-962-3319.

6:00 PM

I.	CALL TO ORDER	
II.	PLEDGE OF ALLEGIANCE	
III.	ROLL CALL	
IV.	APPROVAL OF THE AGENDA	
V.	APPROVAL OF PREVIOUS MEETING'S MINUTES	
VI.	REPORTS	6:05-6:15
	a. Citizen Reports	
	<i>This agenda item provides an opportunity for citizens to address the Commission on matters not on the consent or regular agendas.</i>	
	b. Council Update (John Fogle)	
	c. Staff Update (Nikki Garshelis)	
VII.	AGENDA – CONSIDERATION OF NEW BUSINESS	
	a. Howard Sinclair Service Station – 123 N Lincoln (Mike Scholl)	6:15-6:45
	b. Priority Outreach Ideas	6:45-7:15
	c. Tour de Pants 2015 (Nikki Garshelis)	7:15-7:30
	d. Holiday Outreach	7:30-7:45
	e. Set Next Meeting's Agenda/Identify Action Items	7:45-7:50
VIII.	COMMISSIONER COMMENTS	7:50-7:55
	<i>This agenda item provides an opportunity for Commissioners to speak on matters not on the regular agenda.</i>	
VIII.	ADJOURN	

1 **City of Loveland**
2 **Historic Preservation Commission**
3 **Meeting Summary**
4 **September 15, 2014**

5
6 A meeting of the Loveland Historic Preservation Commission was held Monday, September 15 2014 at 6:00
7 P.M. in the City Council Chambers in the Civic Center at 500 East Third Street, Loveland, CO. Historic
8 Preservation Commissioners in attendance were: David Berglund, Jim Cox, Stacee Kersley, Jon-Mark
9 Patterson, Mike Perry, Paula Sutton and Chris Wertheim. Bethany Clark, Staff Liaison to the HPC in the
10 Community & Strategic Planning Division and Nikki Garshelis of Development Services were also present.
11

12 **Guests:** Michelle Pearson, Coordinator of Historic Preservation Education Grants, History Colorado and
13 Laura Israelsen, Teacher Librarian, Hulstrom Options K-8 School and Amanda Rachuy.
14

15 **CALL TO ORDER**

16 *Commission Chair Berglund called the meeting to order at 6:00 p.m.*
17

18 **APPROVAL OF THE AGENDA**

19 *Commissioner Patterson made a motion to approve the agenda; the motion was seconded by Commissioner
20 Sutton and it passed unanimously.*
21

22 **APPROVAL OF THE MINUTES**

23 *Commissioner Wertheim made the motion to approve the minutes from the July meeting, the motion was
24 seconded by Commissioner Cox and it passed unanimously.*
25

26 **CITIZEN REPORTS**

27 None
28

29 **CITY COUNCIL UPDATE**

30 *None Councilor Fogle was absent*
31

32 **STAFF UPDATE**

- 33 • *Bethany Clark reported that postcards have been sent to 386 properties notifying them of their
34 property's status on the Loveland Historic Preservation Survey. She has been receiving calls from
35 people interested in historic preservation and has sent information to interested property owners.*
- 36 • *Clark reported that the City now owns the Art Deco gas station located at 123 North Lincoln Avenue
37 and the previous owner has the first right of refusal for anything that involves the building until
38 June 30, 2015. Mike Scholl will be at the October HPC meeting to discuss the future of the building.
39 Commissioners expressed their concern over waiting too long to have a plan to move the building.*
- 40 • *Clark reported that open houses are scheduled for September 28th at the Farmer's Market in
41 Fairgrounds Park, and on October 7th at the Police Institute from 4:00-7:00pm. She invited the HPC
42 members to attend.*

48 **CONSIDERATION OF NEW BUSINESS**

49

50 **EDUCATION AND OUTREACH BRAINSTORMING SESSION**

51 *Michelle Pearson*, Coordinator of Historic Preservation Education Grants at History Colorado and Laura
52 Israelsen, Teacher Librarian, Hulstrom Options K-8 School, facilitated a brainstorming session with the HPC
53 members in order to help them prioritize historic preservation educational outreach ideas. Staff, as well as
54 Amanda Rachuy, a guest and volunteer, also participated in the exercise. Pearson spoke about the availability
55 of grants for their ideas. Pearson said she will compile their ideas along with a timetable of how to move
56 toward successfully developing their goals.

57

58 **Historic Preservation Action Plan**

59 The HPC agreed that they would table the action plan until January 2015 in order to add their educational
60 outreach plan to it.

61

62 **BUDGET UPDATE**

63 *Bethany Clark* reported that the budget looks better than originally thought due to a lower mailing cost for
64 the postcards. She explained that an increase request of the budget was thought by management staff to be
65 premature as the HPC has not traditionally overspent. If they were to need more funds in 2015 they can
66 request an increase through a supplemental form to Council, she explained.

67

68 **Next Meeting's Agenda/Action Items**

- 69 • Review of Educational Outreach Report
- 70 • Historic Gas Station Future – Mike Scholl, Economic Development Manager
- 71 • December Outreach Holiday Event

72

73 **Commissioner Comments**

- 74 • *Commissioner Perry* reported that the ELKS Club historic preservation celebration was well attended
75 and thanked Bethany Clark for her participation in it.
- 76 • Timberlane Farms Heritage Days event was not very well attended but it was a nice event. There
77 was a discussion about how to do more advertising.
- 78 • The Pulliam Building fundraising is ongoing. They are trying to raise 6 million without assistance of
79 historic preservation grants.
- 80 • *Commissioner Cox* suggested that the HPC write a letter of support for the DDA in Loveland. He said
81 DDAs are very successfully in neighboring cities. He is happy that Loveland is making a
82 commitment.
- 83 • *Commissioner Kersley* suggested holding a movie night at the Rialto with a historic themed movie.
84 Commissioner Patterson said he will help her try put that together.

85

86 **Meeting adjourned at 7:55p.m.**



Community & Strategic Planning

500 East Third Street, Suite 310 • Loveland, CO 80537
(970) 962-2745 • Fax (970) 962-2945 • TDD (970) 962-2620
www.cityofloveland.org

STAFF UPDATE

Meeting Date: October 20, 2014
To: Loveland Historic Preservation Commission
From: **Bethany Clark, Community & Strategic Planning**

Format:

If a more in-depth discussion or extensive questions on a specific item is desired, staff requests that the HPC Chair establish if it is the Commission's consensus to have a longer discussion. Staff will be happy to answer questions on any item with individual commissioners after the meeting.

If the staff update indicates that staff will be pursuing a particular course of action, no comment from the Commission indicates that the Historic Preservation Commission is supportive of that course of action.

Staff Update Items:

287 Strategic Plan

Open houses were held on September 28th during the last Farmer's Market at Fairgrounds Park, and on October 7th at the Police Institute to present the concepts developed, along with proposed strategies for the 5 character zones along Highway 287. The first open house had nearly 100 participants and the second open house had 10 participants. Comments were generally very positive and supportive of the concepts developed. The plan is still expected to be adopted by the end of 2014.

Comprehensive Plan

Two all-day charrettes were held with the consultant team and City staff on October 8th-9th to develop the organization of the Comprehensive Plan, identify key opportunities, and develop a set of metrics to measure the plan's success on an annual basis. The general public and all City Boards and Commissions were invited during the evening of both events to comment on the process and opportunities identified.

Boulder for Milner-Schwarz Plaque

Staff has been working with Parks and Recreation to find a remnant boulder from the Mehaffey Park project to use for the plaque at Milner-Schwarz. Once an appropriate size and shape boulder is found, staff from Water and Power has indicated they could volunteer to move the boulder with their equipment. The Loveland Historical Society should begin thinking about placement of the boulder on the site.

*Loveland
Brainstroming
Session
Fall 2014*



Reflection and Strategic Planning Session

Michelle Pearson: History Colorado State Historical Fund

Laura Israelsen: 2010 Colorado Librarian of the Year

History Colorado State Historic Fund— 1200 Broadway, Denver, Colorado 80203

T: 303-866-2976 E: michelle.pearson@state.co.us E: laura.o.israelsen@adams12.org



Executive Summary

After meeting with the Loveland Historic Preservation Team, discussing the challenges and celebrations of the work in historic preservation by the city and commission, and brainstorming a vision for the future in outreach and education, the Preservation Tech and Outreach Team is excited to both see and continue to support the ongoing preservation planning, survey, and historic preservation activities of this special city which is an excellent example of innovation, thoughtfulness, and vision in community engagement and outreach. Shared in this report are the compilations of the brainstorming session of the commission and the strategic lists of project tasks and goals from our time together. All of these ideas embrace the heritage of this area, the rich historic built environment, and the active challenges of growth and commercial development as the community looks towards the future.

We hope that you will continue to engage in the community conversations surrounding the preservation of this historic area and the structures which provide a meaningful link to Colorado history and architecture, and we are here to support you in this effort.

History Colorado Staff Reflections

Included just before the appendix are staff reflections from the team (Laura and Michelle). We felt it was important to have your brainstorming results and information presented and then we added thoughts as we reflected on the mission of the Loveland Historic Preservation Team, and your work. We are very happy to continue to support your efforts and elaborate on any of the comments made in this reflection section.

Next Steps

Included in addition to this summary of data from the brainstorming meeting, are an annotated cover page, collection of reflection sheets, organizational tools, and planning resources to continue the conversation for sustaining these ideas in the future. As always, the Preservation Tech and Outreach Team is more than willing to assist in any way possible to support these efforts and look forward to a collaborative partnership into the future. Please do not hesitate to be in touch with us as we welcome the opportunity to support your efforts and cheer in your successes as you move forward. We can come and walk you all though this effort in planning as well. Just be in touch!



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Overview of Historic Commission:

The Historic Preservation Commission meets the **third Monday of every month at 6:00 p.m. in the City Council Chambers, 500 East Third Street.**

The Historic Preservation Commission advises the City Council on all matters related to historic preservation. The Commission reviews resources nominated for designation as either an historic landmark or district and makes recommendations to the City Council. The Commission reviews and makes decisions on any application for a landmark alteration certificate. The Commission advises and assists owners of historic properties on physical and financial aspects of preservation, renovation, rehabilitation, and reuse, including nomination to the local, state or National Register of Historic Places. The Commission develops and assists in public education programs, conducts surveys of historic sites, properties, or areas, and actively pursues financial assistance and incentive programs for preservation-related programs. The Commission administers the program for awarding zero-interest loans for the rehabilitation of historic structures, and reviews and makes recommendations to the City Council regarding amendments to the City of Loveland Historic Preservation Plan.

Three out of seven members of the commission (43%) shall be professionals or shall have extensive expertise in a preservation-related discipline including, but not limited to, history, architecture, planning, or archaeology. Recognizing that professionals may not be available, this requirement may be waived by the city council following a good faith effort to recruit such professionals.



Putting it All Together: Initial Draft Priorities and Top 10 List

As you begin to look at priorities from the information collected here, note that these priorities were the Loveland Preservation Commission's "first best thinking ideas" which came forward during our brainstorming and refinement session. THESE ARE NOT IN PRIORITY ORDER. That priority is for your team to decide. These are a starting point. They most likely will continue to change and different community factors make this a living, working document. These are recorded here as ideas and themes could be used with planning and prioritization lists in the appendix. The Historic Preservation Commission may continue to add to them at any time. *** Note that the top 5 ideas from each group may not explicitly be listed but could blend within these ideas and themes, so the use of this list and your brainstormed ideas would make a perfect match for long-term planning.*

IDEA

ELIMINATE OR GREATLY REDUCE THE NEGATIVE CONNOTATION OF HISTORIC PRESERVATION

OPEN UP AND CONTINUE DIALOGUE WITH THE CITY ABOUT HISTORIC PRESERVATION

DEVELOP NEW AND INCREASED WAYS FOR MARKETING AND OUTREACH THROUGH SOCIAL MEDIA AND OTHER MEANS

DEVELOP A REAL ESTATE TOOLKIT FOR AGENTS TO PROMOTE HISTORIC PRESERVATION AND SUPPORT HOMEOWNERS

INCREASE COLLABORATION WITH LOCAL HISTORIC PRESERVATION / INTERESTED GROUPS (SCHOOLS, SENIOR GROUPS, OPEN SPACE, FAIRS AND MARKETS)

EXPLORE THE INVOLVEMENT OF YOUTH IN HISTORIC PRESERVATION (YOUTH COMMISSIONER)

CITY UPDATE AND VISIBILITY TO CITY COUNCIL

CREATE A PRESERVATION HOW-TO TOOLKIT

COLLABORATE WITH LOCAL SCHOOL DISTRICT TO EDUCATE KIDS ABOUT HISTORIC PRESERVATION (HS CIVICS CLASSES, 4TH GRADE, 2ND GRADE, ETC)

CHRISTMAS ORNAMENT FOR HISTORIC PLACES IN LOVELAND



Putting it All Together:

** Those in italics were listed as the top 5 in each team and are not in a specific priority order except that the italicized were called out as important.

List of Ideas Team 1

- *Share information about the Secretary of Interior's Standards for Historic Preservation.*
- *Models for historic buildings and places*
- *Working with districts and teachers to get into curriculum*
- *Social Media Development*
- *Be visible to City Council through updates/ presentations*
- *Realtor education*
- V-Day bomb- History of cancellations and stamps
- Historic days Lego models
- Genealogy – family and community history
- Theater production of history of Loveland/ melodrama
- Historic costumes and interpreters
- Coordinate with the community calendar for events
- 4th Street Chronicle
- Youth Commissioner
- Tour De Pants
- Murals
- Living history farm
- Newsletter
- Xmas ornament
- Historic house tour



List of Ideas Team 2

- *Adult education on WHY historic preservation is important*
- *Kids camp based on historic places*
- *Marketing and outreach to promote the understanding of historic preservation and places*
- *How to preserve historic places toolkit*
- *Have an increased presence in different types of media that is Pro-Historic Preservation*
- Scavenger hunt
- Incentivizing people to take over historic places and preserve them
- Re-Photography Projects
- Historic places deck of cards
- Phone tour
- Monopoly game for historic preservation
- Xmas Ornaments
- Historic Preservation booth at Farmer's Market or other fairs
- Geocaching historic places
- HPC 5K in May
- Senior tours and collaborating with older resident programming
- Selfies with historic places
- You-Tube videos about the importance of historic places
- Model train diorama
- Illuminate agricultural history of Loveland through historic places
- Women's tea/men's social
- Team opportunity with AIMS College and Loveland
- Artist community – gallery walk, art shows, Pleinair Loveland
- Make sure marketing events are cross checked and go out to multiple partners to build capacity (newsletter and events can be shared with others to host on their calendars and marketing lists)
- Historical Car shows at historic sites
- Create and understand and some case studies on the preservation before, during, and after
- Book of historic murals
- Create video clips for school programs
- Create activity books for Loveland
- Collaborate with Loveland HS Club Vintage
- Biking History tour
- Driving tour w/ cell phones
- Virtual games that focus on history and historic sites
- Support and share field trips to historic sites



History Colorado Staff Reflections

Historic Preservation Recommendations

- Loveland has highly significant areas, and some that are just now being recognized as historic. A continued focus on historic survey and planning for the designation of these resources should be a high priority. This includes the mid-century modern architecture which so many citizens are unaware of, and do not realize it has significance and historic qualities.
- Consider working with Patrick Eidman from History Colorado Preservation Programs, and the coordinator of CLG's in the state of Colorado to support training of new commission members, strengthen partnerships with other CLG's in the area, and understand ways that the commission can continue to work proactively with the Loveland City Council.
- Continue building collaborative relationships with other historical entities in Loveland to build capacity, harness shared resources, and show collective public benefit for future programming and grants.
- Gently and proactively continue the increased public awareness of the benefits of historic preservation through alternative means. If technology is a worry—harness some youth to help out. Awareness and discussion is half the issue—with education and understanding the ideas presented can take root and grow.
- Continue to examine, and employ, innovative programming in partnership with other community groups which provide opportunities for high quality interpretation and educational outreach efforts. These efforts can include but are not limited to:
 - a. Consider partnering with other organizations focused on historic preservation that currently have programming on historic sites in Loveland.
 - b. Consider expanding connections to the local school district and youth community groups through one-time and sustained programming.
 - c. Consider partnering with the local community center and senior services to provide adult programming and education classes focused on historic preservation, history, building design, and other tools that will assist in the awareness of historic preservation opportunities and challenges.
 - d. Consider working with local real-estate entities and agents to promote an understanding of historic preservation and to become a "go-to" resource for answers.



- e. Consider moving some of your established resources into an inexpensive electronic book, which may be small in revenue but LARGE in awareness and interpretation.
- f. Continue to harness the power of the State Historical Fund grants program to create educational materials, and resources to support planning efforts as development continues to grow in Loveland. This can range from public toolkit resources for real estate agents and people interested in historic preservation, to film, to curriculum, to signage or programming.



History Colorado State Historical Fund:

Resources

Grant Application Tips

- <http://www.historycolorado.org/grants/grant-application-tips>

SHF Grant Fund Application Forms

- <http://www.historycolorado.org/grants/application-forms>

SHF Outreach Support

- <http://www.historycolorado.org/grants/outreach-assistance>

State 20/20 Plan

- <http://www.historycolorado.org/archaeologists/state-preservation-plan>

Economic Benefits Report

- <http://www.historycolorado.org/grants/economic-benefits-report>

CLG Resources for the State of Colorado

- <http://www.historycolorado.org/oahp/city-county-government-preservation-programs-clg>



Appendix: Additional Resources and Reflection Ideas

Thought Questions for the Future:

Looking at four key components of non-profit development, this sheet provides questions for group reflection that focus on the Capacity, Preservation, Sustainability, and Funding of an organization. Additionally, they offer discussion opportunities that can provide the opportunity to review how your organization can move forward in the future.

Reflecting On and Revising a Mission Statement:

All strong non-profit organizations regularly review their mission statement to ensure that it matches their current vision. This worksheet offers questions for reflection, which support review of an organization mission statement by stakeholders.

SWOT Organizational Structure:

A SWOT analysis can be completed on multiple topics. It is a manner in which to reflect on the things that the organization does well, and those that are more difficult. Completing this chart can be a way to reflect on the organization and specifically target key challenges to eliminate.

External Factor Assessment:

This chart helps to collect and organize data that focuses on trends that are impacting a community. With close examination of this data, an organization can effectively plan for the future.

Stakeholder Analysis Form:

This form will assist with identifying key stakeholders working in the community with your organization and may assist in identifying future partners.

Strategic Priorities Worksheet:

Selecting strategic priorities to work on in a systematic fashion, can allow an organization to empower member participation, increase capacity, and sustain the organization. Using copies of this form, the leaders can identify THREE key priorities that are critical to the organization's success and deconstruct them. In this way, the team can identify if their priority is truly critical to the organization's mission.

Strategy Formulation Worksheet:

This worksheet builds upon the brainstorming we have completed as a group. The SFW helps break down the priorities into a work plan that will lead to success. Your goals should be **specific** and include tangible objectives/action steps to guide your work and track progress. What will success "look like"? Will certain people in the organization be working, interacting or functioning differently? Will work be assigned differently? All goals should include measurable, achievable objectives and action steps.

SMART Goals:

SMART goals can be a critical part to the long-term success and sustainability of an organization. Included in this appendix is the SMART goal worksheet, which was shared at the brainstorming and planning session.

Terminology:

These terms are referenced in the Strategic Planning Guide provided here.

Tips for Effective Grant-writing:

Part of a successful preservation program is fundraising. This guide provides suggestions for successful grant writing tips for small organizations and non-profits.

Overview of Resources Provided

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SMART Goals:

Presented at the workshop, this overview sheet explains the background to the concept of SMART goals, and is here again as a secondary reference.

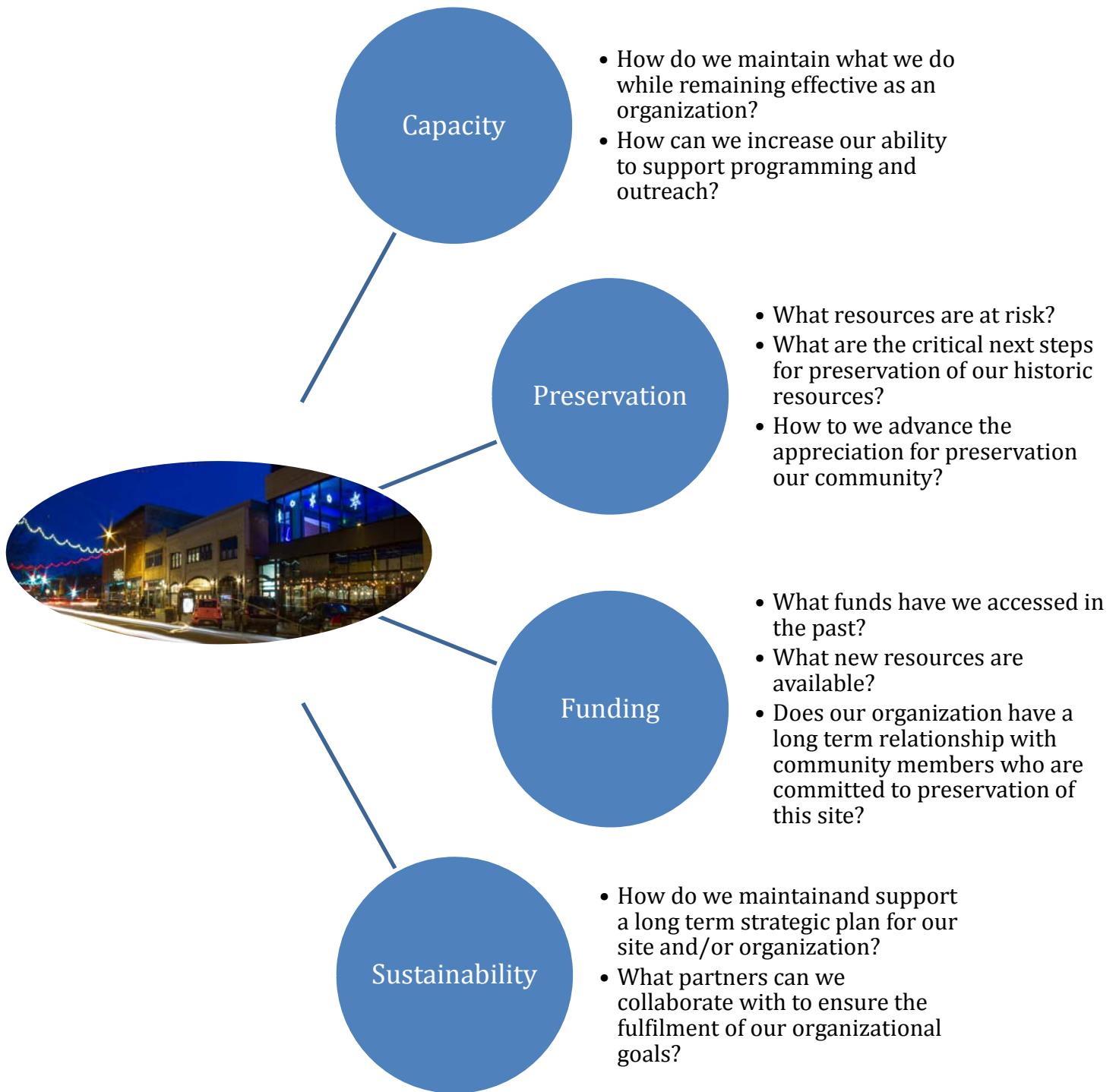
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Thought Questions for the Future



Reflecting On and Revising a Mission Statement

Please use the following as a tool when reflecting on the mission statement and revising the mission statement in the context of the identified priorities:

1. What do we do?

2. How do we do it? (What evidence do we have that supports this?)

3. What is the purpose of what we do?

4. For whom do we do it?

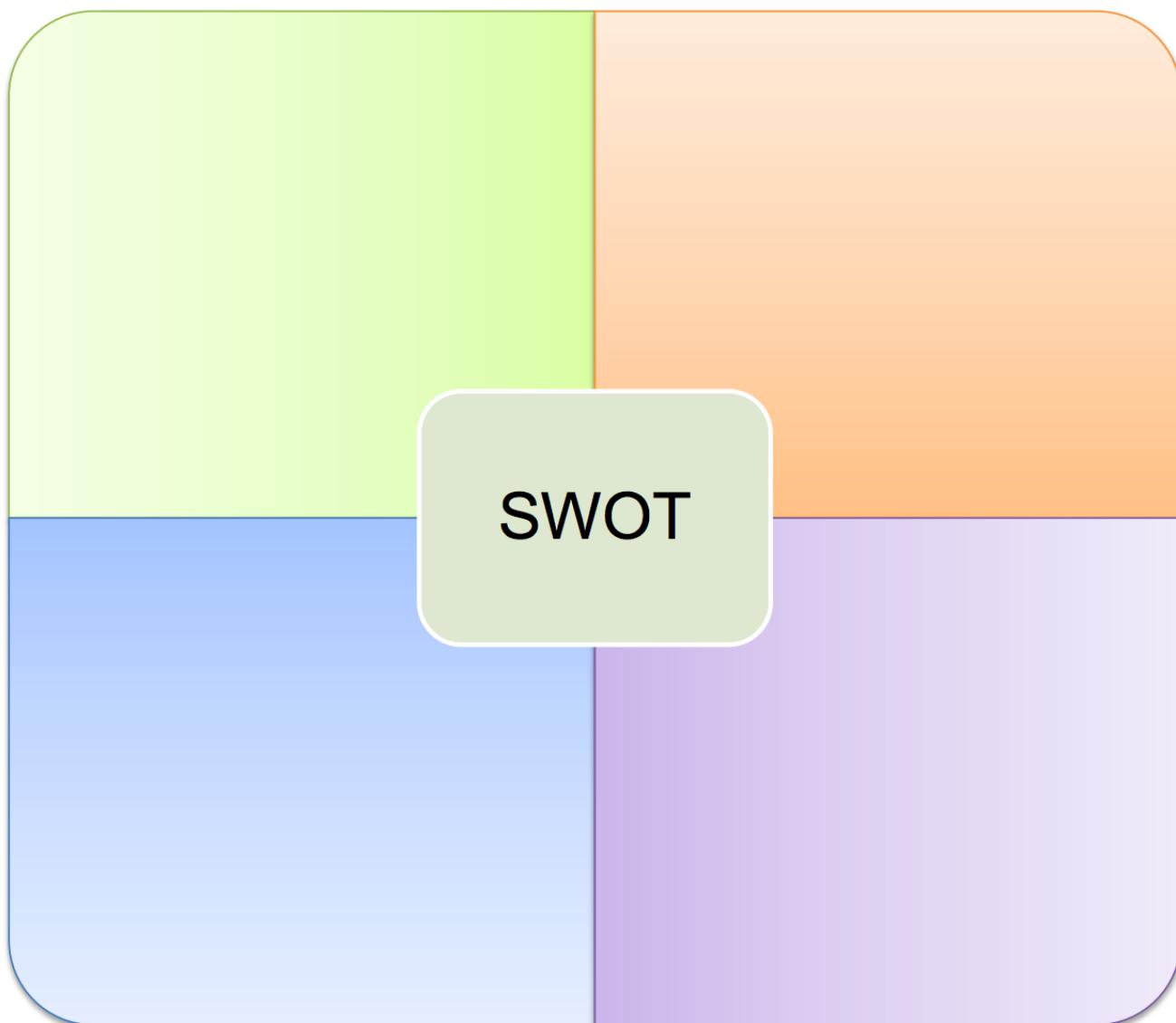
5. What action words are in the organization's mission statement that can be used to reinforce the organizations action steps and plan?

SWOT: Organizational Structure

A SWOT analysis can be completed on multiple topics. It is a manner in which to reflect on the things that the organization does well, and those that are more difficult. Completing this chart can be a way to reflect on the organization and specifically target key challenges to eliminate.

Strengths: Qualities and attributes of the organization that enables us to accomplish our mission and goals.

Weaknesses: Qualities and attributes of the organization that prevents us from accomplishing our mission and full potential.



Opportunities: Opportunities that are afforded the organization because of the members of the team. (Think about what talents each member contributes to the organization.)

Threats: What threats exist that can erode the structure and effectiveness of the organization?

External Factor Assessment: Reflection and Review

What are the current trends in our community?

Factor	Data
Economic Climate	
Social	
Demographics	
Political	
Legal	
Technology	
Budget	
Programs/Services	
Clients/Users	

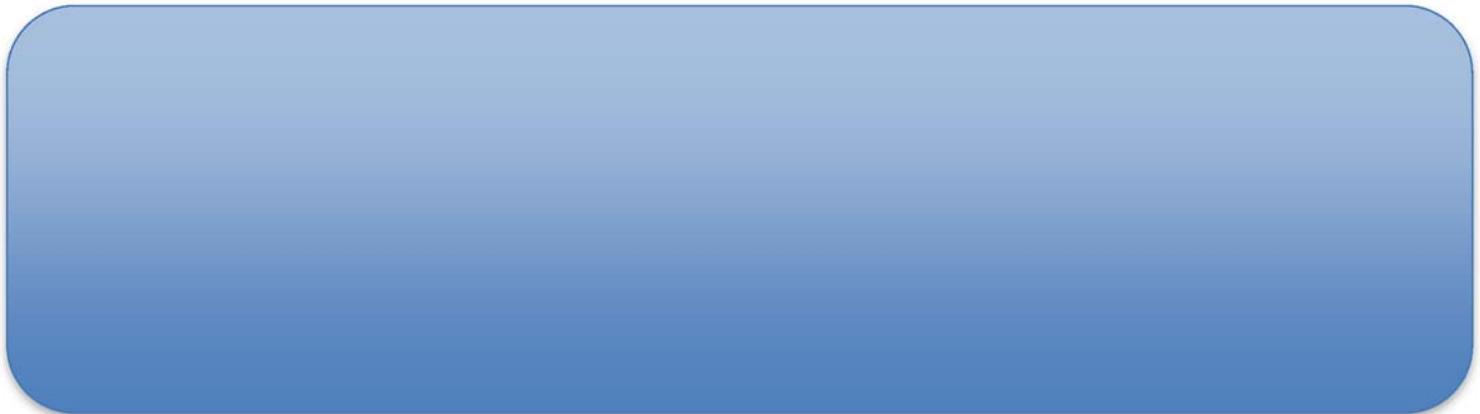
Strategic Priorities Worksheet

Selecting strategic priorities to work on in a systematic fashion, can allow an organization to empower member participation, increase capacity, and sustain the organization. Using copies of this form, identify THREE key priorities that are critical to the organization's success and deconstruct them so that the team can identify if their priority is truly critical to the organization's mission.

What is the priority?

A large, light blue rectangular box with rounded corners, designed for users to write their answer to the question "What is the priority?"

Why is this priority?

A large, light blue rectangular box with rounded corners, designed for users to write their answer to the question "Why is this priority?"

What are the consequences of not addressing this priority?

A large, light blue rectangular box with rounded corners, designed for users to write their answer to the question "What are the consequences of not addressing this priority?"

Strategy Formulation Worksheet

What is the objective?

Why is this priority?

What goal does this objective meet?

1.

Strategies (*Strategies are the HOW*) How will we make this objective happen?

1.

2.

3.

Strategy#	Action Steps	Resources Needed (People, \$,Connections)	Who will lead this effort?

What partnerships do we need to accomplish this priority?

How do we know we have met this objective?

Target Completion Date:_____

S

- Specific
- Your goals should be specific and include dates, resources and dollar amounts that are needed to make them happen.

M

- Measurable
- How exactly will you know whether you have achieved this goal. What data will tell you if you have met your mark?

A

- Attainable
- Your goal should be attainable -- and at the same time it is important to understand that it may take time to meet this goal. What milestones will tell you that you are still moving towards your end result?

R

- Realistic and Relevant supported with proper Resources
- Your goals should be realistic and relevant. You may need to revise them over time. Do you have the resources you need to achieve the goals you have set?

T

- Timeline
- Your project/goal should have a realistic timeline for completion.

TERMINOLOGY

Stakeholder = any person, group or organization that can place a claim on the organization's resources, attention, output or is affected by its output.

Mission = A short written statement describing the purpose of the organization. The mission statement provides direction and guides the day-to-day work of the initiative.

Strategic Priority = (AKA: Strategic Direction, Strategic Issue, etc.) A category or statement identifying an area of emphasis that addresses critical issues and/or provides a strategic direction.

Goal = A statement of what we want the college to achieve or accomplish. A goal states the intent and purpose that supports the Strategic Priority.

Objective = A statement of what you will do to achieve your goal. Objectives describe the specific approaches you will use to achieve your goals.

Action Steps = Concrete activity(s) that will be taken to achieve the objective. Action steps should be sequential and easy to "measure" through the outputs. These "measurable" steps make the strategic plan a usable, working document. Vice Presidents will track their progress by reviewing the strategic plan at yearly meetings.

Measurement = Tangible results of the action steps. Outputs can be tracked and documented through process evaluation methods.

Tips for Effective Grant Writing

Grants are provided for a reason. There is a goal or objective that the funder is trying to achieve. Grants are often provided by foundations, corporations, universities, and local, state and federal government sources. For federal funding alone, there are 26 federal grant-making agencies, 900 individual grant programs, and over \$350 billion in grants each year. But, there is a catch. Grant funds are to be utilized only to meet the specific goals, outcomes, and objectives of the funder. You cannot use grant funds for any other purpose other than dictated by the funder. Also, with federal funds, you can supplement existing programs and services, but you cannot supplant existing funding. When you apply for federal funds, you become a steward of taxpayer dollars. Your funder will want to make sure that you are committed to using those dollars in the best manner possible and that you understand that the funding belongs to the citizens.

Plan Ahead

Thoroughly read through the grant. You are looking for the BIG THREE: timelines, deadlines, and guidelines. Highlight every required item. Use these items to make a checklist that you will follow as you prepare the proposal. Be prepared to invest the time to collect resources, produce a tape, document capability, update a resume, collect letters, and include reference reports or whatever is needed. Guidelines will usually indicate:

- | submission deadlines
- | eligibility
- | proposal format: award levels forms, margins, spacing, evaluation process and restrictions on the number criteria of pages, etc.
- | review timetable
- | budgets
- | funding goals and priorities
- | award levels
- | evaluation process and criteria
- | whom to contact
- | other submission requirements

Identify the goals and outcomes of the grant. What is the funder aiming to accomplish with the funds supplied? The goals and objectives of the grant become "key words" that you should utilize throughout your proposal.

Grant reviewers evaluate

- | Significance
- | Approach
- | Innovation
- | Qualifications

- | Past Performance
- | Availability of Funds
- | Goals
- | Scope

Start with outcomes. One of the biggest mistakes nonprofits make in grant writing is not making their desired outcome absolutely clear. Your grant will start with a summary of your proposal, which is rarely more than a page long. This is where you'll outline the high points of your grant. It's crucial to be clear about the outcomes you desire to see from this project from the start. You'll need to match your outcomes as closely as possible with the goals of the funding source. Determine how you will measure the goals and outcomes. You need to define the methods you will use to determine if you are hitting the mark.

Determine resources needed. Do you have the staff and resources to meet the goals and outcomes identified? Some grants take several months before an initial payment is received. Do you have the existing capital to absorb costs until that first payment arrives?

What is the Return on your Investment? If it costs you \$5000 to receive \$4000, then there is not a good return on investment and the grant may not be right for your organization.

Take the grant seriously. Assume that competition is high. Write a succinct and complete grant. Assume that your funder knows nothing about your organization. Prove that you are the best organization for fulfilling the goals and outcomes identified by the funder. You may want to consider hiring a professional grant writer.

Be prepared to back up your statement of need with cold, hard facts, however a key element of writing a grant is persuasive writing. Remember the who, what, where, when, why and how approach:

- | Who is your organization and how do you qualify to meet this need?
- | Who is the population this proposal and your organization will serve?
- | Who will you partner with? (Funders LOVE to see successful partnerships that leverage their funds.)
- | Who will be performing the tasks you identify in your grant?
- | Who will benefit and how?
- | Who is the target audience, and how will you involve them in the activity? How many people do you intend to serve?
- | What does the funder want you to do? Do your narrative and action steps meet that goal?
- | What concern will be addressed and why is it important? What's the problem you are addressing? (Remember - the problem is not your need - it's the community's need!)
- | What need does your proposal fill or what problem are you addressing?
- | What specific objectives can be accomplished and how?
- | What is the expected impact? What will change? - Increase, Decrease, Reduce

- | What action(s) is necessary for achieving the goals? What are you proposing to do? - To provide, To establish, To create.
- | What problems or barriers do you foresee? How will you overcome them?
- | What are the qualifications and experience that make your program the right one to take on this work? (History, key accomplishments, qualifications of staff and volunteers, relationships in the community....as they relate to this project.)
- | What resources do you already have? From whom? (Don't forget volunteers, donations and in kind services. Show the community participation in your project. Project the image that the funder is joining a winning team, not boarding a sinking boat!)
- | Where will the tasks be completed?
- | Where will my organization be in the future?
- | When will the tasks be completed?
- | Why are the tasks important in order to meet the goals?
- | Why is the goal of the funder important?
- | How will results be measured?
- | How does this funding request relate to the funder's purpose, objectives, and priorities?
- | How much will it cost?

Action Steps

Action Steps identify the process(es) that will lead to the intended outcome.

Action Steps must:

- | specify actions taken by the organization to fulfill a specific outcome.
- | be reasonable within the context and timeframe of the project.
- | achieve the goals, objectives, and outcomes specified.

Action Steps can:

- | be process-oriented (i.e., clients will receive ...; clients will develop ...).
- | provide additional clarification of the intended outcome.

Remember to be “SMART”:

Specific - precise: precise and detailed, avoiding vagueness

- | Well defined
- | Clear to anyone that has a basic knowledge of the project

Not Specific - Serve dinner

Specific – Serve a nutritionally balanced meal at 6:00 pm every evening to John, Mary, Jane and Laura. The meal will include a vegetable salad, a bread item, a protein (meat), three vegetables (e.g. broccoli, beans, corn, etc.) and one low-fat dessert.

Measurable - able to be measured: capable of being measured or perceived

- | Know if the goal is obtainable and how far away completion is
- | Know when it has been achieved

Not measurable – I will lose weight.

Measurable – I will lose 5 pounds before December 31st, 2009.

Attainable - accomplish something: to achieve a goal or desired state, usually with effort

- | Know if the goal is obtainable and how far away completion is
- | Know when it has been achieved

Not attainable – I will become President of the United States on January 16th, 2013.

Attainable – I will run for the public office of President in the next primary election to be held on May 12th, 2013.

Relevant - connected – having social significance: having some sensible or logical connection with something else such as a matter being discussed or investigated.

- | Demonstrates impact
- | Demonstrates purpose
- | Achieves the objective identified

Not Relevant – I will serve him a meal each day.

Relevant – I will serve him a well-balanced and nutritional meal based on recommended dietary guidelines that will lower his cholesterol by 8% before the end of the calendar year, thus increasing his life expectancy and quality of life.

Time Bound - occurring at a specific time within a specific time frame

- | Bound to a specific time frame or completion date
- | Enough time to achieve the goal
- | Not too much time, which can affect project performance

Not timely – I will sell three calendars to customers.

Timely – I will sell three calendars to customers on or before the close of business, June 15th, 2009.

Example of Action Steps

Goal: Implement an after school program for children ages 5 to 13 years of age.

1. Develop school age focus group – We will organize a focus group of school age children to identify activities that they would like to see in an after school program – Date of completion May 3rd, 2005.
2. Develop a formal program activity implementation plan. This plan will include activities identified in the focus group, costs for those activities, resources needed for those activities, feasibility of those activities, and qualifications of persons needed to conduct those activities – Date of completion June 1st, 2005.
3. Identify program capacity – Based upon funding available, activities required, resource limitation, building capacity, and partnerships needed, we will set the limits for participation including minimum number of students needed for the program to be successful and maximum number of students that can be enrolled in the program – Date of completion June 8th, 2005.
4. Engage Partner Organizations – We will engage the following partner organizations that have already committed to assisting in this project by:

Developing a formal written Memorandum of Understanding with the YMCA After School Program that clearly identifies the activities to be performed, the date of those activities, the purpose of those activities – Date of completion June 15th, 2005.

Develop a formal written Memorandum of Understanding with the School District to arrange for after school busing of students from their home school to the YMCA – Date of completion July 8th, 2005.

5. Implement media campaign – We will conduct a media campaign through the newspaper, the local radio stations, a newsletter, a parent mailing and a TV advertisement targeted at the parents of school age children in grades K through 6 that explains the program, the cost of the program, the site of the program, transportation to and from the program, program dates, and program activities – Date of completion August 1st, 2005.
6. Register clients – We will register clients based on the media campaign by conducting an in-house registration with a registration form, record of immunizations, school information, parent contact information, and days of participation. Registration will be limited to the number of students determined in Step 3. For additional students, we will start a waiting list – Date of completion August 14th, 2005.
7. Start Program – The program will begin on August 27th, 2005. This is the first date of school in our district.

8. Measure effectiveness – We will measure the effectiveness of the program on December 31, 2005 by analyzing the following:
 - a. Number of students enrolled – Increase, Decline, Students on Waiting List
 - b. Parent satisfaction survey
 - c. Cost analysis – profit and loss
 - d. Engaging students from Step 1 focus group to determine if activities are successful, needed, warranted and entertaining.
9. Implement needed changes – Based upon the results of the measurements in Step 8, we will make the necessary changes in order to keep the program viable – Date of completion January 31st, 2006.

Performance Measurement

All Performance Measures that have ever existed in the history of the universe involve answering two sets of interlocking questions:

- | How Much did we do? (#)
- | How Well did we do it? (%)
- | Effort - How hard did we try?
- | Effect - Is anyone better off?

Specifications

Tailor proposal writing to specifications found in the guidelines. Include only the number of pages allowed. Observe the format. Is there a form to complete? Must the proposal be typed, double spaced, on 8-1/2 x 11 inch pages? Are cover pages allowed or desired? Caution! — The beautifully bound proposal is not always appreciated or allowed. Be concise. Elaborations should add depth and scope, not page fillers. Be prepared to write more than one draft.

Funders don't want to see the pebble you throw in the water, they want to see the ripple effect afterward. What impact will you be making as you work the action steps you identify? Remember, your proposal isn't just an idea, it is a contractual commitment between you and the funding organization and you will have to meet every requirement the funder has and every item that you say you will complete.

Organizing your Thoughts

- | Write a clear statement of need.
- | Write clear and concise goals and objectives.
- | Include your methodology and your plan for evaluating your success.

- | Consider where else you might receive funding.
- | Spend time thinking about your budget.
- | Consider who might provide a good reference or support for the project and ask that person/organization to create a letter of support (do this in advance!).

Write clearly. Watch out for another common grant writing mistake: unclear writing. Remember, you're not writing to subject matter experts here; you're writing to grant making agencies with employees who may or may not understand your jargon and technical terms. Make sure your language is well-organized and easy to understand; and that your grant's headline is both descriptive and catchy.

Be enthusiastic. A dull proposal will not catch anyone's eye.

Budgets

Budgets are cost projections. They are also a window into how projects will be implemented and managed. Well-planned budgets reflect carefully thought-out projects. Be sure to only include those things the funder is willing to support.

Funders use these factors to assess budgets:

- | Can the job be accomplished with this budget?
- | Are costs reasonable for the market - or too high or too low?
- | Is the budget consistent with proposed activities?
- | Is there sufficient budget detail and explanation?

Many funders provide mandatory budget forms that must be submitted with the proposal.

Don't forget to list in-kind support and matching revenue, where appropriate. Be flexible about your budget in case the funder chooses to negotiate costs.

Supporting Materials

Supporting materials are often arranged in an appendix or attachments. These materials may endorse the project and the applicant, provide certifications, add information about project personnel and consultants, exhibit tables and charts, etc. For projects that include collaborations or partnerships, include endorsements from the partnering agencies.

Authorized Signatures

Authorized signatures are required. Without these, proposals may be rejected. Be sure to allow yourself time to acquire a needed signature.

Format Matters

Illustrate your idea with formatting that makes your concepts easy to read and understand. Include graphs and charts where applicable; use bolded subheads and bullet points; and make sure your document is easy to read and understand. The more you make it easy for agencies to understand your concepts at a glance, the more your ideas will shine through. In addition, make sure you're following any formatting guidelines the agency puts forward.

Letters of Intent

Many funders require that one is submitted prior to accepting a full proposal. Typically, it should include:

- | Introduction
- | Description of organization
- | Statement of need
- | Methodology
- | Other funding sources
- | Final summary

Requests for Proposal (RFP)

A RFP is an invitation from a funder to submit applications on a specified topic with specified purposes. It is generally a written application based on specifications.

Stewardship

When you apply for funds, you become a steward of those funds and you have responsibility for taking good care of resources entrusted to you. You are taking responsibility for the survival and well-being of something that is valued. There is a science, art and skill of responsible and accountable management of resources. Do you have the skill set needed to maintain proper stewardship? Do you have resources to assist you with this goal? Remember; ALWAYS be a good steward of your funds and of your relationship with your funder!

Do it right the first time

Set a writing schedule and stick to it. Be sure to gather feedback on drafts as you go. We suggest using someone to proof for grammar and someone to proof for content. Have a person that knows nothing about your organization review your grant. Can they "get there from here" based upon your proposal? If they don't understand how your proposal will meet the objectives identified, chances are that a grant review panel won't as well.

To Wrap it up

As you research potential funders, you will sometimes encounter that tricky situation - a donor who specifies: "No application form is required, submit proposal." What proposal!?! you scream (but only out of hearing of the donor!) Well, a complete proposal has basic and time-honored elements - and here they are!

Note that when a brief proposal or letter is specified, you want to try to hit most of these points as well - only in a more abbreviated way.

Cover Letter

- | No more than one page.
- | Organization (who you are and your background briefly), purpose of funding, and the amount of your request should appear in the first paragraph.
- | Include a contact name, phone number and address.

Proposal Summary

- | Limit to one page.
- | State the organization making the request and link organizational background to the proposal purpose.
- | State your project purpose.
- | Briefly state how your project will be implemented.
- | State the results you expect from your project.
- | Include your total budget amount, other funds that are committed and the amount of your request.

90% of funding decisions by private donors and foundations will be made by the time the funder finishes reading this page. It must be concise, compelling, and clear!

Introduction to the Organization

- | History
- | General Purpose
- | Goals and objectives as they relate to this project, and in overview, as they provide a context for the work you want to undertake.
- | Accomplishments, especially as they relate to this project or to your capacity to provide this project.
- | Service areas and population served.

Statement of Problem or Need

- | Use a funnel approach.
- | Start with the generalized problem as it occurs in your community.
- | Move to the conditions which make this a problem.
- | Outline current resources that address this problem and identify gaps in those resources.
- | Identify how your proposal will fill these gaps.

Project Goals and Objectives

- | What specific goals are you trying to achieve?
- | What measurable milestones will you reach in meeting those goals?

- | How will you and the funder know that you are making progress towards your goals?

Methods and Schedule

- | What actions will you take to achieve your goals?
- | What steps must you take to achieve success?
- | Who will do what? (Include here job descriptions and background statements of staff or the qualifications you will seek in staff for the project. This is true even if "staff" will actually be volunteers.)
- | When will these actions take place?

Evaluation Criteria and Process

- | How will you know whether you are achieving your goals?
- | What will you measure to evaluate your progress?
- | What records and information will you keep to allow you to measure your progress?

Budget

- | More detail is better than less.
- | Don't round out if possible. Use bids and estimates whenever you can get them - even if they are informal quotes.
- | Don't pad your budget. Competent reviewers will know the cost of goods and services, and will understand prevailing wages. If they know you are trying to deceive them on budget, what else will they suspect you of trying to deceive them about?
- | Do include all sources of support - including volunteer time, donated space and borrowed equipment. Don't shortchange the contribution your community is making to your project.

Resources:

Grant proposal writing tips: <http://www.cpb.org/grants/grantwriting.html>

The Basics of Grant Writing for Nonprofits: How to Get the Money: <http://www.distance-education.org/Articles/The-Basics-of-Grant-Writing-for-Nonprofits--How-to-Get-the-Money-67.html>

Grant Writing Tips: <http://www.seanet.com/~sylvie/grants.htm>

Formulating Action Steps: <http://www.core.tcu.edu/documents/FormulatingActionSteps.pdf>