HOUSING MANAGER TRAINING PROGRAM

First Nations

WRITING PROPOSALS

Participant's Manual

Participant's Workbook

11-10-05

CMHC — Home to Canadians

Canada Mortgage and Housing Corporation (CMHC) is the Government of Canada's national housing agency. We help Canadians gain access to a wide choice of quality, affordable homes.

Our mortgage loan insurance program has helped many Canadians realize their dream of owning a home. We provide financial assistance to help Canadians most in need to gain access to safe, affordable housing. Through our research, we encourage innovation in housing design and technology, community planning, housing choice and finance. We also work in partnership with industry and other Team Canada members to sell Canadian products and expertise in foreign markets, thereby creating jobs for Canadians here at home.

We offer a wide variety of information products to consumers and the housing industry to help them make informed purchasing and business decisions. With Canada's most comprehensive selection of information about housing and homes, we are Canada's largest publisher of housing information.

In everything that we do, we are helping to improve the quality of life for Canadians in communities across this country. We are helping Canadians live in safe, secure homes. CMHC is home to Canadians.

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First Nations Housing Manager Training Program

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Overview—Housing Managers Training Program

Building the capacity of First Nation Housing Managers

The construction and maintenance of affordable, quality housing is a priority issue for First Nations across Canada.

A positive partnership

Your Housing Manager Training Program is the result of an innovative partnership between Canada Mortgage and Housing Corporation (CMHC) and Anokiiwin Training Institute.

Indian and Northern Affairs Canada (INAC), Western Economic Development (WED) and Human Resources and Skills Development Canada (HRSDC) supported the partnership. The result is a highly focused, culturally relevant, challenging and rewarding training program targeted to the specific needs of First Nation Housing Managers just like you.

The Housing Manager Training Program

The primary objective of the First Nations Housing Manager Training Program is to help Housing Managers strengthen the skills and experience they now have and to help them develop new skills through a combination of classroom and hands-on learning.

Strengthening the capacity of First Nations Housing Managers

As First Nations regain more control over governance and administration of their own affairs, Housing Managers take on increased responsibility for all elements of First Nation housing programs. High-quality training, with a special focus on the broad range of skills that Housing Managers need to effectively manage housing, is a great help to individuals in developing and strengthening the skills they need for their role.

Helpful Hint

Housing programs include programs started or sponsored by First Nations, governments and government agencies and private organizations. Housing programs are usually long-term and usually focus on more than one goal.

Housing projects include short-term activities that have defined start and end dates. The activities include specific actions that support the achievement of housing programs and projects. They usually focus on a single or a few goals.

The ability of Housing Managers to effectively manage housing programs, projects and activities depends in large part on their knowledge and skills, and their commitment.

This Module is part of a comprehensive training program specifically designed to help Housing Managers acquire the knowledge and develop the skills they need to put their commitment to positive use.

The Housing Manager Training Program gives you the opportunity to develop practical management skills that are based on a combination of theory and practical application. The specific objectives are to provide

- First Nation Housing Managers with the practical knowledge and skills they need to manage programs, projects and activities
- an introduction to general, transferable management concepts and theories

- a culturally relevant learning experience for First Nation Housing Managers
- practical, professional development for Housing Managers that fits into work schedules and takes as little time as possible away from their communities and work

The Housing Manager Training Program is made up of a number of individual modules. Together, the Modules are a complete training program. Separately, each Module is an individual Workshop.

This highly interactive approach to learning new skills encourages you to test new ideas, fine-tune skills and share experiences and expertise with other Housing Managers in a supportive learning environment.

The Housing Manager Training Program is delivered through traditional and innovative learning activities, including

- facilitated classroom training in both urban and community-based programs
- facilitated Workshops (an average of one week of Workshops every month on an ongoing basis) delivered through both urban and community-based programs
- a combination of both classroom training and facilitated Workshops

The developers of the Housing Manager Training Program are now working on Internet-based, self-paced, computer-based, independent study workshops.

Successful participants will be better managers of all types of housing program activities, including operation, construction, maintenance, financial management and client counselling.

The Housing Manager Training Program depends upon a blend of quality curriculum, professional delivery and your motivation. The fact that you are taking part in the Workshops clearly shows that you are motivated to learn and that you are committed to doing the best job possible.

Training that works for you

The Housing Manager Training Program recognizes that there is a need for common understandings that can be translated into relevant activities for all First Nation Housing Managers. You will learn the basic theory behind many of the duties and responsibilities that all Housing Managers share. Practical exercises in each workshop give you the opportunity to try out that theory on specific issues you must deal with in your own community.

This is what the "**Helpful Hints**" and "**Interesting Facts**" boxes look like.

Helpful Hints or

Interesting Facts

This is what a reference to another module looks like.

Reference to another module

The *Participant's Manual* is a DETAILED reference document to use in the Workshop.

Their real value comes later, when you return to your community and your job. The *Manuals* are a permanent reference you can refer to repeatedly in response to community issues, problems and opportunities.

Each *Participant's Manual* includes

- a table of contents
- an overview of the Housing Manager Training Program
- an overview of the entire Module
- an overview of each Chapter
- reference to exercises, test, quizzes and projects
- "Interesting Facts" and "Helpful Hints"
- references to other Modules for information on specific subjects
- an optional glossary or list of words and terms with their definitions

Each *Participant's Workbook* includes real-life exercises and activities. These hands-on exercises ensure you understand how to apply the theory you are learning to your own circumstances. Completing the exercises and activities with other participants gives you a chance to learn from each other as you share common concerns and seek advice on individual problems.

Making Workshops work for you

In most cases, the Housing Manager Training Program is delivered through individual *Workshops* on specific topics. The curriculum and exercises for the *Workshops* are designed specifically for a Workshop presentation. Making the best use of those materials requires your full participation.

The general guidelines for the *Workshops* include

- confirming attendance requirements for the Workshop (usually required by the sponsor)
- requirements for passing quizzes and tests, and completing exercises and projects (usually required by the sponsor)
- start time, break times, lunch time and finish time
- procedures for group discussions, exercises and individual work
- respect for other participants
- appropriate use of facilities
- sharing ideas and comments constructively
- any emergency procedures
- other guidelines set by the sponsor or the group

The Workshop facilitator will review these guidelines and discuss any additional rules your group feels will help your Workshop work better. You should ensure that you know and meet your sponsor's requirements.

You will get out of the Workshops what you put in. Workshops are designed to encourage you to be actively involved and to encourage the others in your Workshop to take an active part. Each of you have your own experience and expertise to share. Your active involvement makes the best use of those experiences and knowledge.

Putting it all into perspective

The Housing Manager Training Program is more than just learning new things for the sake of learning itself.

The program helps Housing Managers do their work better and more effectively. It does not end there. The program also helps you, as a Housing Manager, to help all the people in your community enjoy access to affordable, healthy, high-quality, well-maintained housing.

For more information on the First Nations Housing Manager Training Program, please contact your regional Canada Mortgage and Housing Corporation office.

To find the address, telephone number and fax number of the CMHC office closest to you, visit this website:

http://www.cmhc-schl.gc.ca/en/contact/contacten_002.cfm

Exercise 1—Participant introductions

Exercise 2—Participants' expectations

Chapter One—The "Strategic Ask"

Proposals ask for something from someone else

They can ask for a straight grant for a project. They can ask for the development of a partnership. They can ask for a loan or contribution for a project. In reality, there are many different types of proposals, but the bottom line is that

every proposal asks for something from someone else

Requests involve "give and take"

The people making a proposal need to offer some positive reward to the people receiving the request. That positive reward can range from financial gain to fulfilment of a social responsibility.

No matter what the reward, the key to a successful proposal is matching the right request to the right reward. That is the secret of the ***"strategic ask."***

The strategic ask is the core of every good proposal. It doesn't matter . . .

- how pressing the need
- how well thought-out the solution to that need may be
- how sound the proposal's logic may be
- how professionally it is presented
- how eloquently it is written...

...if the people you ask for help don't see a reward for being involved in your project, your proposal will likely fail—even if it meets a pressing need, is well-thought-out, logically sound, professionally presented and eloquently written.

The 10 basic questions

Developing a sound strategic ask is largely a matter of asking 10 basic questions.

1. What is the need you are seeking to address?
2. What do you require to address that need?
3. Who else is interested in addressing that need?
4. Why should anyone want to help you address that need?
5. What assistance can others offer to help you meet that need?
6. What can you offer them in return for their help?
7. When is the best time to ask them for help?
8. What is the best way to ask them for that help?
9. What information do they want when considering your request?
10. What do you do if they don't provide you with that assistance?

Writing effective proposals is the art of answering these questions in the form that funders require.

And the first step in writing an effective proposal is to research and prepare solid responses to the 10 questions.

Exercise 3—Asking the strategic question

Chapter Two—A proposal for every purpose

Governments, foundations and corporations spend hundreds of millions of dollars every year to fund proposals for everything—from child care to computers. Some recent examples of different funding include:

- **First Peoples Collaborative Exchange Program**—Canada Council–Up to $30,000 is available to help First Nation organizations and artists to enable First Nations peoples to travel and share their ideas with other First Nations nationally and internationally.
- **Electronic Data Interchange Initiative**—Indian and Northern Affairs Canada–All Bands and Tribal Councils are eligible for up to $10,000 to upgrade computer systems and connect to the Internet.
- **Aboriginal Head Start Initiative**—Health Canada–In October, 1998, Health Canada expanded this program to include on-reserve First Nations children and their families. Funding for the new expansion is set at $100 million.
- **Economic and Community Development Fund**—Province of Quebec Secretariat aux Affaires Autochtones–A $125 million fund for Aboriginal community infrastructure projects, business start-ups, job creation and entrepreneurship assistance.
- **Housing Internship Initiative for First Nations and Inuit Youth**–CMHC–An employment initiative that provides work experience and on-the-job training for First Nations and Inuit youth to help them pursue long-term employment in the housing industry.
- **Housing Managers Training Program**—CMHC contributes funding to reduce tuition fees for selected participants.

Although these proposals look different, they are all opportunities for funding. Preparing successful proposals includes looking for all the different ways to find funds for various projects.

Sometimes, a project is a perfect fit with existing funders. Sometimes, those seeking funds must massage and fine-tune the proposal so it fits the funder's requirements. Other times, the funding agency itself may offer opportunities for programs that were not being considered before that funding was made available.

It is important to look at a project from different perspectives to determine what funding may be available.

Finding the funders

There are thousands of information sources about funding programs. They include

- publications about funding programs
- governments–federal, provincial, territorial and municipal
- individual funders
- libraries
- the Internet and websites
- specialized databases
- word of mouth and networking

Some sources target different areas of interest. Others include information about a variety of programs. No single database or publication includes information on every possible funding source.

Using more than one information source can greatly increase the chance of finding the right funder.

There are agencies and organizations that will help find funding sources. Some, such as the Volunteer Centre of Winnipeg, (http://www.volunteerwinnipeg.mb.ca/) don't charge a fee. Others—usually associated with consulting firms—charge a fee and will also help develop a proposal for a fee.

The Web has a great deal of valuable information about funding sources and applying for funding. There is no charge for much of this electronic information. There are also several commercial databases that charge for their services.

Finally, funders themselves, both government and non-government organizations (NGOs), often provide information about funding sources, other than their own, that address areas of interest to them.

Finding potential funders for a specific project can involve different approaches. Each method of locating funding sources has its own advantages and disadvantages. Accordingly, more than one means of searching out potential funders can be used for the same proposal.

History repeats itself

The first and most common approach to finding funding sources is to rely on what has happened in the past.

A funder who has helped one type of specific project in the past is likely to help a similar project. This is especially true with government funders and larger foundations, which have continuing programs with very specific objectives and guidelines.

There are three main advantages to the historical approach.

1. It is easier to identify funding programs that continue for long periods.
2. It is easy to determine exactly what the funder wants by comparing the elements of proposals that it accepts with those it rejects.
3. Quite often the funder will provide assistance to the same group for the same, ongoing project. Accordingly, the same general proposal (using an application form) can be submitted without preparing an entirely new proposal.

There are also three major disadvantages.

1. Over time, a reliance on a specific funding program can develop. If the program is cut back, it may be difficult to find new funding for activities that have become dependent on one funding source.
2. The longer a program continues the more others learn of its existence and apply for funding for their own projects.
3. Because the amount of funding that is available from one source is limited, the resources can be strained as more demands are made. Consequently, funding levels may be cut back to fund more projects, or the funder may discontinue or restructure the program.

Ongoing funding programs with established guidelines do not usually encourage innovation or new types of projects.

The historical approach works best in combination with other approaches.

Finding the new kids on the block

New funding for proposals is constantly becoming available as governments, foundations, corporations and other funding sources develop new programs or significantly revise existing ones.

Quite often, being among the first to apply for these programs is a distinct advantage. More importantly, because every program has monetary limits, funding sources can dry up quickly. Those who don't apply for funding early may find that the funder rejects perfectly acceptable proposals because all the program funds have been allocated.

Funding programs come and go. Don't waste time preparing proposals for discontinued or oversubscribed programs. Make certain the program that interests you is still current and still has funding. You can do this by contacting a representative of the funder—a good practice in any case—to confirm the status of the program.

Exercise 4—Prospecting for potential funders

Keeping up-to-date

Just as some programs disappear, new programs arise. There are several ways to keep up-to-date on new programs.

Ask the funders

Funders can be excellent sources of information about new funding programs and can often provide information about other programs.

Get on the lists

Many government agencies, foundations and other organizations have mailing lists and other ways of notifying interested people about their programs and other activities. Make certain you are on their mailing lists.

Watch the papers

Many funders announce new programs in newspapers and other media. Monitor press releases and news stories for details about funding programs.

Surf the Net

The Internet is an excellent information source about funding programs. Learn how to use search engines to locate specific information on program funding.

Pay for commercial information

There are many commercial sources that sell information about new programs. Some organizations offer complete overviews of a wide variety of funding sources, while others focus on specific areas. Consultants can also research specialized funding sources.

Each of these information-gathering tools offers its own advantages. Use them in combination to ensure you have the most complete information possible.

Exercise 5—Finding the funders

Exercise 6—Picking project partners

Exercise 7—Considering the funders

Chapter Three—Putting it in the proper perspective

Because every proposal asks someone for something, it is important to structure and write the proposal from the perspective of how they will perceive the "ask" and the benefits from involvement in the project. A successful project must convince someone that the project is a good idea that can make a difference to a problem.

Write every proposal from the perspective of both the author and the recipients. The authors identify the need and the proposed solution based on their view of the situation. But the authors must present the need and solution so it captures the funder's attention and shows the benefits of involvement in the project.

In some cases, funders are very clear about the information they want. The most common example of this type of proposal is the application form for funding.

In other cases, the proposal format is largely at the discretion of the individual or group preparing it. Apart from general guidelines about areas of interest, permitted and non-permitted budget items and application deadlines, the project proponent determines the information and format of the proposal.

Between these two, funders use many different approaches. Often, funders involved in more than one activity use different approaches for each one.

No matter what the required format (or lack of one), it is essential that the proposal reflect the funder's perspective to the greatest extent possible. To do this, the author should consider the following.

Build the message on needs	Show the funder that the proposal is important because it meets an important need.
Build the proposal on benefits	Show the funder the related benefits and the target of the proposed program if the project is successful.
Consider the funder	Consider how the funder will feel about the proposal and what the funder is looking for.
Show action and outcomes	Identify what will be done and what will be the outcome in terms of what, how, when, who, where and how much.

Exercise 8—Budget

Chapter Four—Developing the budget

Budget development should consider general criteria and specific categories. These criteria identify both where the money is going and where it is coming from. In general, each proposal budget should outline

- the entire cost of the project (by individual expense)
- the amount being requested from each funder
- all sources of funding and the amounts each source contributes
- project costs that will be covered by other sources

Some funders require this information in a set format, while others leave presentation to the proposal proponent.

Creating a budget forces the proponent to make detailed decisions about the proposal. Consequently, developing a budget should begin early in the proposal writing process. Funds requested must be consistent with the narrative's objectives and activities so anyone dealing with the proposal can determine if the requested funds are adequate and reasonable.

Funders will usually ask the following questions:

- Can the project be successfully completed within the proposed budget?
- Are the costs associated with specific activities within general market prices? Are they too high or too low?
- Does the budget reflect the actual activities that will be part of the project?
- Is the budget supported by sufficient detail, explanation and supporting documents?
- Do the budget items meet the criteria for allowable costs for grants?
- What other sources of funding are being requested by the project proponent?
- What in-kind contributions and matching revenues are included in the budget?
- How will the budget be monitored?
- What is the record of the proponent in preparing and following budgets?
- Will the project require continuous funding, and if so, how will it be funded?

In most situations, funders are as concerned about a project being underfunded as they are about an inflated budget. They also want to ensure that actual project costs are continually monitored to prevent cost overruns and that money is spent according to the approved budget.

A proposal budget can be broken into

- expenses directly related to producing the product or service as set out in the proposal
- expenses not directly related (such as overhead, or general running costs) to producing the product or service, but required to implement the project

Direct costs can include all or parts of

- salaries and wages
- consultant or subcontractor fees
- mandatory employment-related costs (MERCs) and fringe benefits
- office and space rent
- equipment costs
- supplies and materials costs
- depreciation of equipment or facilities
- utility costs
- operation and maintenance expenses
- general administrative expenses

Indirect costs are often based on the same categories as direct costs; however, they are usually related to an organization's common or joint ongoing activities.

In-kind contributions can include monetary or non-monetary items, such as

- equipment
- supplies
- space
- staff time
- special resources

In general, most funders want realistic, complete, well-documented budgets.

Budgeting—Putting the numbers together

In most cases, funders want a detailed budget as part of any proposal. Some have strict rules for the budget format. Others may leave presentation up to the proponent. In either case, there are categories common to most budgets. They include

Wages, benefits and personnel expenses

- wages for anyone who will be paid as part of the project
- fringe benefits or MERCs for anyone receiving wages through the project
- consultant and professional fees, sub-contract costs
- expenses for paid staff and volunteers working on the project
- travel costs for staff and volunteers

Facility purchases or rentals

- capital and financing costs of purchased facilities
- rental of facilities used during the project

Cost of materials and equipment

- purchase of materials and equipment for the project
- rental of materials and equipment for the project

Operating costs

- cost of operating supplies for the project, for example, office
- general operating costs, such as copying, printing, phone-fax, and postage
- advertising and marketing costs
- insurance costs

Administrative costs

- bookkeeping
- clerical
- project management

Financing costs

- cost of borrowing or debt financing

Taxes and fees

- business taxes, sales taxes
- fees for licences, permits and so on

In-kind contributions

- staff contributions
- volunteers
- supplies and materials
- cash contributions

Income

- funding from other sources
- fees
- products sold

Budgeting tips

TIP 1—What you plan to spend should match what you plan to do

Budget numbers should reflect the proposal narrative. The requested funding should relate directly to the goals, objectives and proposed activities as outlined and explained in the proposal.

TIP 2—Keep the budget realistic

Cost calculations should be realistic—that is, substantial enough to get the job done, but not inflated, either intentionally or inadvertently. Funders who review the proposal will be just as concerned by budgets they feel will not get the job done, as they will by budgets they think are inflated.

TIP 3—Keep timing in mind

The budget should "grow" with time. It is important to calculate possible inflationary costs that could affect projects that may not start until well after the budget has been submitted or for multi-year projects. Look for possible salary and cost-of-living increases and include them in the budget.

TIP 4—Explain what you mean

Justify budget items through narrative explanations as necessary. Make certain the reader knows what you are talking about for each budget item. Be prepared to provide extensive detail and documentation for each line of the proposal budget. Use notes to answer the more obvious questions before they are asked and to clarify anything requiring more detail.

TIP 5—Partner-up

Both public- and private-sector funders, especially governments, encourage partnerships in which various groups work together on a project that is funded by those partners along with different agencies. The more partners (within reason) you can include as sponsors and supporters of a project, the better chance that project has of being funded. As well, the more funders (again, within reason) you can find, the more likely they (along with others) are to fund a project.

TIP 5—Never be afraid to negotiate

Some funders prefer to negotiate the final level of funding. In some cases, they do so to test the budget. In other situations, they may need to do so because they can't (or don't want to) fund the budget to the requested amount. If it is expected that there will be negotiations, it may be possible to build some flexibility into the original proposal to make room for negotiations.

Making it simple—Using a budget template

While every budget is different, there are budget items some common to all projects.

The following template gives most of the elements of a typical proposal budget.

Budget template						
Wages and MERCS				**Wages**	**MERCS**	**Total**
Staff 1						
Staff 2						
Staff 3						
Expenses	**Travel**	**Hotel**	**Meals**	**Day care**	**Other**	**Total**
Staff 1						
Staff 2						
Staff 3						
Volunteer 1						
Volunteer 2						
Consultant fees and expenses		**Fees**		**Expenses**		**Total**
Consultant 1						
Consultant 2						
Facility purchase		**Capital costs**		**Financing costs**		**Total**
Facility 1						
Facility 2						
Facility rental						
Facility 1						
Facility 2						
Materials, equipment purchase, rentals			**Purchase**	**Rent**	**GST**	**Total**
Item 1						
Item 2						
Item 3						
Item 4						
Operating costs			**Purchase**	**Rent**	**GST**	**Total**
Advertising and promotion						
Copying						
Insurance						
Office supplies						
Phone/fax						
Postage						
Printing						
Shipping and freight						
Taxes and fees					**GST**	**Total**
Business tax						
Fees						
Permits						
Other expenses						
Expense 1						
Expense 2						
Expense 3						
					Total project costs	

In-kind contributions	Total
Contribution 1	
Contribution 2	
Funding from each source	**Total**
Fees	
Products sold	
Funders	

Watching the cash—Cash-flow projections

Cash-flow projection is crucial. A good cash-flow projection regularly predicts cash inflows and outflows. By knowing when the project will need money to pay staff and suppliers, the project managers can make arrangements to ensure that funds are available—or to delay an activity if funds are not available. Or, if short-term financing is required, a cash-flow projection will assure lenders that borrowed money will be paid back when due.

Weekly or monthly projections are the basis of most cash-flow projections.

For shorter projects—less than one year—it is possible to develop a realistic cash-flow projection for the entire project.

For longer, multi-year projects, it is possible to develop a more general cash-flow projection for the entire project, but detailed projections will likely only work well for shorter periods, such as six months or a year.

Trying to project cash flow too far into the future may be counterproductive. Too often, the final figures are too general or even incorrect.

On the other hand, not projecting far enough into the future limits the usefulness of a cash-flow projection because it doesn't allow for longer-term planning.

Projections allow cash-flow management that

- increases cash inflows
- decreases cash outflows
- reduces the number of short-term gaps between money coming in and money going out.

Chapter Five—Timing the proposal

In proposal development and writing, timing can be everything. Five major factors can affect proposal timing.

1. Deadlines for applications and proposals
2. Availability of funding
3. Funding cycles for individual funders
4. Timing constraints on specific project activities
5. Events that focus on a specific area of interest for a funder

Many funders have deadlines and will not review a proposal submitted after the deadline.

Even if there is no deadline, there are usually so many demands for funding that money runs out before the program's deadline. This is why it is important to present a proposal early in the program's life.

However, some programs don't make a decision until the end of the program, so they can see all the requests before choosing specific projects.

There are a number of timing constraints for specific project activities that can influence when to submit a proposal.

In some cases, a project must start by a specific date in order to meet an organizational deadline. For example, ordering construction materials in communities without all-weather road access must be done in time for shipment by winter road. If the funder does not approve a community housing proposal in time, costs will increase significantly or construction must be put off for another year.

Quite often, governments and government agencies must spend their program money before the end of the fiscal year—usually March 31st—or they lose the funding. There may be a flurry of activity in the last three months of the fiscal year when they realize they have to spend their remaining money.

Outside factors can affect timing. For example, a major public health concern or a public safety problem can focus attention on a specific problem. A proposal related to the situation at the same time may be received more favourably than at another time.

The key to timing is understanding and analyzing the different factors affecting timing and submitting the proposal accordingly.

Chapter Six—Casting a wide net

All funders require some type of proposal; however the type of proposal can differ significantly from funder to funder. In some instances, the proposal can be a simple application form or a one-page letter. In others, the proposal will need detailed information about the project.

Funders outline their information and format requirements in directions on application forms and guidelines for proposals. If asked, they usually provide more detail about preparing an application. Some will provide sample proposals.

At the very minimum, almost every proposal need

- a description of the need for the project—"Needs Assessment" or "Problem Statement"
- reasons why the funder should support the proposal—the "Case"
- identification of who will be affected by the project—"Target Group"
- a list of what will take place during the project—"Strategies and Activities"
- a list of the ways that need will be addressed—"Goals and Objectives"
- a list of project costs and income—"Budget"
- an indication of when activities will take place—"Schedule" or "Timeline"
- an overview of the difference the project will make—"Outcomes" or "Results"
- an analysis of what the project is intended to accomplish—"Evaluation"
- identification of who is responsible for the project—"Sponsor" or "Proponent"
- an indication of other parties involved with the project—"Partners"
- who to contact for project information—"Contact Persons"

The type of proposal depends largely on the kind of funding being sought. In general:

- Government programs usually have formal, detailed, standardized proposal formats and application forms.
- Foundations have their own application forms and proposal formats that require information that is of most interest to them.
- Commercial sources usually require proposals with a strong financial and marketing emphasis.
- Non-profit organizations are usually more interested in social benefits of a project and can be less stringent in their proposal requirements.

No matter to whom the proposal is addressed and the style of the proposal, it is essential to include all the requested information in the format the funder wants. Each proposal should be fine-tuned to the funder's exact requirements.

Partnering proposals

Funding agencies and organizations, including governments at all levels, want to see their money stretch as far as possible.

They generally encourage groups to support each other or even work together on projects they fund.

Finding partners is a good way to show support for a project. Partners can be people who are willing to contribute time, energy or in-kind contributions to a project. In other instances, project partners may be involved in the project from design to implementation. Occasionally, a project proponent may be asked to partner on someone else's project.

All these circumstances offer constructive ways to promote a project to potential funders as an activity with wide support and significant benefits.

In some cases, project funders want other funding agencies to take part in a project. They will ask a proponent to find financial support from other funders before committing their funds to their project.

It is important to remember that a partnership is only as strong as its weakest link. Try to find partners who strengthen the project by bringing special expertise or resources or contact with other potential funders.

In some cases, proponents taking on projects with which they have little previous experience may want to work with individuals or groups that have successfully completed similar projects in the past.

The credibility of partners in a project can affect the perceived credibility of all the other partners. Ensure that partners brought into a project are responsible and reputable.

Partners can work together in different ways. In some cases, partners will be equal, with all partners actively designing and delivering the project. In other instances, a lead partner assumes most of the responsibility for delivery. Or, some partners may be involved in a project only for specific activities and they may come and go throughout the life of the project.

Chapter Seven—Writing the proposal

After researching, writing the proposal begins.

There are some general rules to follow in writing a proposal.

Follow the guidelines

Funder guidelines can range from explicit instructions on applications to general suggestions about writing style.

These guidelines are a strong indication of what a funder expects and how the funder wants information presented.

Application forms have a set space for information. Proposal guidelines may suggest—or demand—that written materials be a certain length. Sometimes supporting documents must be organized according to informal or formal instructions.

Whatever the guidelines, it is crucial to follow them. Read instructions carefully—and follow them even more carefully.

Go easy on the reader

Make the proposal easy to read. Present information concisely and clearly in plain language. Avoid jargon that may be unfamiliar to the reader. Format the proposal so it is easy to read. Use graphics to add interest, but avoid overusing them. Avoid fancy typefaces—they can be difficult to read.

Neatness counts

The written proposal is sometimes the only contact between a funder and the project proponent. In almost all cases, the written proposal makes the proponent's strongest impact. A neat, professionally presented document will impress the funder and give the funder confidence in the proponent. A sloppy, poorly presented document won't.

Generate enthusiasm

Use energetic, positive words and phrases to generate excitement. Choose words carefully and avoid clichés, stock phrases and concepts. Maintain a highly charged information flow that captures attention and keeps the reader interested.

Be prepared to prove a point

Avoid overstating or expanding facts that may be difficult to support. Make sure you can fully support every part of the proposal with sound logic, supporting documents or independent facts. You must be able to support every statement in a proposal. One misrepresentation can cancel out 100 undeniable facts.

Starting at the end—Developing a proposal summary

A short overview of the entire project is the first information presented to the funder. This summary, also called an abstract or executive summary, is the last thing the proponent prepares—but the first thing the funder reads.

Usually, the summary is one page or less. Some funders limit the length of the summary to a specified number words. Despite its short length, the summary contains a wealth of information. It should present a concise overview of the main points that the funder needs to know for a preliminary understanding of the proposal and the proponent.

Most summaries include the following

- information about the project proponent
- the proponent's qualifications
- the specific purpose (need and objectives) of the project
- the target group that will be served by the project
- the anticipated start and end dates (timeline) of major project activities
- the expected end result (outcome) of the project
- the amount and type of assistance being requested
- the total cost (budget) of the project

A summary outlines what is contained in the proposal, but it does not give details. It tells the reader what to look for in the proposal and provides a high-level picture of the proposal.

Often, funders use proposal summaries to weed out proposals that don't meet their requirements or don't interest them, even if they meet general guidelines.

Since a summary is the door to the rest of the proposal, it must be exciting and enticing. Because the summary must be brief, it must be carefully edited for maximum impact.

The summary is often the funder's first opportunity to get to know the proponent. Accordingly, it must generate both interest and trust. The summary should say something about the proponent's experience and reputation.

A good summary will also include a "hook" to capture the reader's attention. The hook usually focuses on why the funder should be interested in the proposal.

Introducing the players and the game

The introduction is the second part of a written proposal. It gives the funder more information about the proponent and the project. The introduction should also enhance the proponent's credibility and generate the funder's interest in the project.

The first step in establishing credibility is determining how the proponent is already perceived. A funder will begin to form an opinion about a proponent on the basis of what the funder already knows. This previous knowledge can be based on past experience, media reports, information from other sources or familiarity with other, similar organizations or groups.

Hopefully, the funder's perception of the proponent is positive. If so, the introduction should focus on building on and reinforcing the positive image by describing the proponent's experiences and successes.

If the funder knows little about the proponent, the introduction should give full details about the proponent, what the proponent has done in the past and why the proponent is well-suited to successfully carry out the project. Testimonials and references from independent sources—especially those the funder may know—help establish credibility and confidence.

It is difficult to overcome a funder's negative view of a proponent. In most cases, it may be possible to overcome minor negatives by addressing concerns candidly, honestly and openly.

The introduction should also give the funder confidence that the proponent can deliver the project. It should also describe the project. The body of the proposal gives full project details, so the introduction should just outline the project's basic elements.

A good introduction should include the following

- a clear and complete description of the project proponent
- an overview of the proponent's philosophy and overall goals
- a general history of the proponent
- an overview of the proponent's clients and services
- an explanation of the proponent's current and past activities
- hard facts about the proponent's previous accomplishments
- endorsements and letters of support from respected, independent sources
- publications and media reports about the proponent
- a brief description of the project
- a clear connection between the project and the proponent's capabilities

Defining the problem

Since a proposal asks for something from someone else, it is important that the funder fully understands how the proponent plans to use the funder's assistance.

The first step is developing a compelling statement about the need for the proposed activities as a "Needs assessment" or "Problem statement."

This description of the problem is the most important part of the proposal. A needs assessment or problem statement can fail for many different reasons

- a need that is not clearly defined may convince the funder that there really isn't a problem
- the need may not be in the funder's area of interest
- the project is outside the proponent's normal activities and the funder is not confident that the proponent can achieve the project goals
- the need is too large and the funder feels that the problem is too big to solve
- the need is too specific and the funder feels assistance is not necessary

Once the need or problem has been clearly stated, document it with statistics, expert reviews, stakeholder comments and personal observations. At this stage of the proposal, the connection between the proponent and the problem should be clear. As well, connections between the problem and the proponent's suggested activities should begin to take form.

In general, a needs assessment or problem statement should

- be consistent with the proponent's philosophy and goals
- show how the problem impacts the funder's areas of interest
- be consistent with the funder's guidelines
- be supported by statistics, expert opinions and clear logic
- show how the "real people" (target group) will benefit
- include stakeholder involvement in development and definition
- avoid rhetoric and overstatements that can't be supported
- be professionally presented in clear, concise and compelling language.

Overall, the needs assessment or problem statement should convince the funder that something needs to be done about a situation . . . and that the funder wants to be a part of the solution. This is the convincer that can make or break a proposal.

Exercise 10-Putting it in the proper perspective

Building the benefits—Goals and objectives

The project begins with a problem that needs to be resolved. The anticipated results of the project are expressed as goals and objectives.

The goal of a project is often expressed as a broad statement of the global change the project is expected to achieve. There is usually only one overall goal for each project.

Objectives are specific results that are measurable during delivery and immediately after the project.

Both goals and objectives should be consistent with the proponent's philosophy and purposes.

It should be easy to measure progress in achieving objectives. Objectives should

- be relevant to both proponent and funder
- be tied to the needs assessment or problem statement
- be connected to specific activities and tasks
- explain what will be done
- describe expected outcomes in measurable terms
- identify who will be doing what during the project
- describe who will benefit from the project
- explain how they will benefit
- say when specific results are expected

- be realistic and focused on success
- be attainable within the project's proposed timelines
- be measurable as to what is expected to change
- be clearly and concisely written

The key to developing workable objectives is ensure that they are measurable.

It is also important to make a distinction between objectives and methods or activities. Goals are what will be accomplished. Methods and activities are what will be done.

Exercise 11—Setting targets

Tell them what you're going to do

The detail needed about activities depends on the type of funding being requested, funders' requirements and project complexity. In some cases, funders ask for just a short description. In other cases, funders ask for a major project management plan with extensive task identification and timelines.

In most cases, a proposal should include details about major activities, and they should be tied to the project goal or directly related to objectives. The description of each activity should show how it helps meet the project objectives.

Overall, the activities should give the funder a clear picture of how the proponent will reach each objective. Activities should be outlined in a sequence that leads towards the project goal. Individual tasks and project phases should build on one another

The activities must match the project's budget. If the budgeted costs for specific activities aren't the same as the amount needed for the activity, the proponent's capacity or credibility may be questioned.

Unrealistic budgets are a major reason for rejection of proposals. If the budget underestimates costs of an activity, the funder may question the proponent's ability to realistically analyze project activities. If the budgeted costs obviously exceed what will be required for an activity, the funder may question the proponent's credibility.

Each activity description can include any or all of the following details

- the name of the task
- desired outcome of the task
- who is responsible for overseeing or conducting the activity
- projected capital and operating costs for the task
- timing within the project sequence for the task
- linkage between the activity and other critical project activities
- means of monitoring activity implementation
- evaluation of the activity's outcomes

Determining the level of detail for project activities will vary according to the funder's needs. Providing more detail than is requested can be just as harmful as providing too little information.

Exercise 12—Putting the plans into action-Activity 1

Exercise 13—Putting the plans into action-Activity 2

Exercise 14—Putting the plans into action-Activity 3

Exercise 15—Putting the plans into action-Activity 4

Exercise 16—Putting the plans into action-Activity 5

Exercise 17—Coming to the right conclusions

Exercise 18—Summing it all up

Keeping on track—Monitoring and evaluating the project

Funders want assurance that the projects they fund will successfully reach their goals and outcomes. That assurance comes partly from monitoring project activities and evaluating overall results.

There should be continual monitoring of specific project activities and overall progress throughout the project. Monitoring is largely a matter of comparing the actual timing, cost and results of activities against the proposal's projected timing, costs and outcomes

If an activity is behind schedule, over budget or not producing the desired results, then there may have to be corrective action. On the other hand, perhaps the original projections were out of line and the project plan will require modification. In either case, the key to determining the solution is to first identify the potential problem while there is still time to prevent it, correct it and take other action.

Effective monitoring depends on assigning responsibility for reviewing and reporting both continually and as required. Reviews should include checklists of the key criteria associated with each critical task.

Evaluations can take place upon the completion of major phases of a project or after the project, or both during and after. Evaluation determines both effectiveness and efficiency of the overall program and specific activities. In general, an evaluation determines the degree to which program outcomes were realized within the projected budget and timelines.

Some evaluations focus on the immediate results of the program. Others consider the longer-term impacts over a period far beyond the end of the program.

No matter how far into the future evaluation looks, the process starts at the beginning by determining to what extent the project addressed the needs identified in the project proposal. Most evaluations also analyze whether the project provided value for money by determining if project funding was well spent. Most evaluations also consider outcomes—the immediate effects on individual's lives—and the ongoing benefits to individuals and society.

Although monitoring and evaluating take place after funding has been committed, the extent to which the proposal proponent outlines useful, realistic monitoring and evaluation methods can have a major impact on a proposal. Every proposal should outline how specific activities will be monitored and how proposal impacts will be evaluated.

Polishing the language

The written proposal is most of what the funder knows about the proponent. In many cases, first impressions are lasting impressions. Accordingly, the proposal should have a professional and impressive style, tone, format and look. The material should be easy to read, inviting to look at, convincing and compelling.

Writing the proposal starts with organizing what will be included in the proposal. Information should flow logically from point to point in sequence throughout the proposal. The flow of the proposal should lead the funder from understanding the need . . . to reviewing how the need will be addressed . . . to recognizing how the funder's assistance can be a valuable part of the project.

The overall format and paragraph structure of the proposal should be designed to take the funder step-by-step through the document. Headings, such as Introduction, Needs Assessment, Budget, Activities List, Monitoring and Evaluation Activities, Supporting Documentation and Appendices, should identify different sections of the proposal.

Each paragraph should focus on a distinct subject. Paragraphs should include a topic sentence that describes what is in the paragraph. Use a blank line to separate paragraphs so that they stand out as separate thoughts. Avoid lengthy paragraphs that address more than one issue.

Proposal wording can have as much impact on the funder as content. It is important to match the tone of the wording to the type of proposal. As well, the proposal wording should

- use active verbs that show action
- use short sentences
- use descriptive words that paint pictures
- use concrete descriptions
- avoid overly technical jargon
- avoid wordiness
- be grammatically correct
- be consistent throughout the proposal
- generate enthusiasm

When the first draft of the proposal is complete, more than one person should carefully review and proofread it. A single proposal can go through several drafts as the content and language is fine-tuned. Keep working on improving content and format until it accurately and professionally makes the case for the project.

Chapter Eight—Making and keeping contact

Actively promoting a proposal often means the difference between a funder accepting or rejecting your request. Most of the time, a proposal competes with many others for limited funding. No matter how well-developed and written a proposal is, it helps to personalize the proposal by "selling" the concept and the proponents and partners to funders and others who can support the proposal.

Promoting a proposal is largely a matter of talking and listening to people about the value of proposed activities, their own insights and the benefits of the project to themselves or others.

Ask others who are interested in, or affected by, the need addressed by the project for their opinions and advice. More importantly, use their suggestions and advice whenever possible.

Those who see some of themselves in a proposal will be more likely to support and recommend a proposal to others. Keep those persons involved as you develop and submit your proposal and when there are new developments. Ask them for their advice on an ongoing basis.

Start by selling a proposal to potential funders by involving them in the process as early as possible. When responding to a proposal call, the proponent should contact the funder to ask questions about the request for proposals (RFP). This early contact can help the funder understand where the proponent is coming from. It can also clarify questions or misunderstandings about the RFP. When submitting an unsolicited proposal or a response to a general program, find out about any specific requirements for similar proposals.

This initial contact can be the time to ask the funder for samples of proposals funded in the past so you can understand what the funder wants in a proposal. Ask the funder for advice and suggestions. It can also help to call the funder after the proposal is submitted, to touch base, make certain the funder has received your proposal and ask if there are any questions about the proposal.

If the proposal is rejected, treat that as an opportunity for feedback about why your proposal did not meet the funder's requirements. A polite inquiry can show the funder that the proponent is committed to the project concept and serious about pursuing it. At this time, the proponent can obtain information on how to develop a proposal the funder will find acceptable in the future.

Acceptance of a proposal is an opportunity to contact the funder to offer personal thanks and let the funder know that you appreciate their efforts. It can also help to call others who supported the proposal to tell them your success in obtaining funding and thank them for their help. Everyone likes to be a part of success. Share successes with as many others as possible.

Finally, because proposals are usually targeted at effecting positive change, the proponent should let the funder and others know how the project is proceeding over time. Contact them during the project to let them know how things are going. In some cases, a funder may require formal evaluations; but provide personal feedback as well. Nobody likes to be forgotten. Keep people informed about, and interested in, the progress of your project.

Promoting proposals is an important part of proposal development. Effective promotion is a combination of

- personal enthusiasm
- a positive approach
- subdued self-confidence
- seeking and using advice and suggestions
- listening and responding to others
- making others want to help you
- making others feel valuable
- showing appreciation
- continuous contact in both good and bad times

Often, the review for a proposal can take longer than expected. In those situations, the proponent should stay in touch with the funder, without putting pressure on the funder. Periodic phone calls, or even personal visits if possible, to the funder's contact person can ensure that the proposal is still being considered.

Reasons for contacting the funder can include asking for an update on the status of the proposal or advising the funder of a new development related to the proposal to consider when making a decision. Ongoing contact with funders is a matter of balancing frequency of contact without appearing to be over-aggressive.

This balance is best reached by paying particular attention to how the funder responds as well as what the funder actually says. If it appears that the funder is becoming less receptive to ongoing contact, the proponent may want to decrease the frequency and intensity of contact for a period.

Exercise 19—Promoting the proposal

Chapter Nine—Making the best of every proposal

There is no real magic to writing proposals. Proposal writing is as much an art as it is a science. Every proposal is different. Promoting a proposal is a unique experience every time. Every proposal is a challenging project. Not surprisingly, not every proposal is going to result in the requested funding or assistance. However, every proposal can be a positive experience if you make the best of it.

Writing a winning proposal is just the first step. If you do receive the funding or assistance requested, it is crucial that you make the best use of that funding through effective and efficient implementation of the project.

A major part of implementing a project is developing a strong working relationship with the funder. Make certain that you know what the funder expects from you. Before you start the project, find out exactly what type of information the funder would like to have. Pay particular attention to the funder's timelines, forms and requirements for supporting documentation. The easier you make the job of monitoring your project, the more likely it is the funder will want to support future initiatives.

If you are not successful in your request for assistance and your proposal is rejected, there is still opportunity to make the best of a less-than-perfect situation.

Don't give up on a funder. If you presented a professional, high-quality proposal, you have set the stage for staying in touch. If you treat the funder with respect and courtesy throughout the proposal process, you set the stage for a productive working relationship for future projects.

Most importantly, don't give up on your project because your initial proposals may not have been successful. If the need is there, and you have a sound answer to that need, you will be successful in the end. Make it a point to learn from every proposal to every funder. Take some time to analyze what works well and what doesn't work for every funder. Review, revise and refine your proposal writing techniques as required. In the end, good projects supported by good proposals will win out.

Putting it into perspective

You have learned a lot about writing winning proposals. Just like everything else you learn, this information is only as valuable as you make it. And, like most learning experiences, it is important to use what you learn in a practical way in order to translate all that theory into real life experience. The more proposals you write, the better proposal writer you will become.

Exercise 20—Taking the next steps

Exercise 21—Workshop evaluation

First Nations Housing Manager Training Program

WRITING PROPOSALS

PARTICIPANT'S WORKBOOK

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Exercise 1—Participant introductions

In this exercise, you introduce yourself to the other Workshop participants and tell them something about yourself. The other participants will do the same thing.

There are many ways for members of a group to introduce themselves to each other. Your facilitator will give you directions about the introduction activity for this Workshop.

Use the space below for notes about the other participants.

Exercise 2—Participant's expectations

In this exercise, you set out your expectations for this Workshop.

In the space below, list what you hope to achieve or learn in this Workshop. Once you have listed your expectations, we will share them with the group. Your facilitator will write them on the flip chart and post them in the classroom so that we can refer to them throughout the course.

To list your expectations, answer the following question:

"This was a great Workshop because I learned . . . "

Exercise 3—Asking the strategic questions

1. What need are you seeking to address?
2. Who can help you address that need?
3. Who else is interested in addressing that need?
4. Why should they want to help you to address that need?
5. What assistance can they offer to help you meet that need?
6. What can you offer them in return?
7. When is the best time to ask them for that assistance?
8. What information do they want when considering your request?
9. What is the best way to ask them for that assistance?
10. What do you do if they don't provide you with that assistance?

Exercise 4—Prospecting for potential funders

There are different ways to identify potential funders for specific proposals. List the various funders for each category. Using standard brainstorming techniques, work with your group to develop the longest list possible.

	Type of program *Ongoing, ad hoc one-time only*	Type of funding *Loan, loan guarantee, grant, matching funds, any purpose, specific purposes*	Ranking *Excellent, good, fair, poor*
Government			
Corporate sector			
Foundations			
Other			

Exercise 5—Finding the funders

1. What sources of information can provide details on possible funding sources?

Exercise 6—Picking project partners

Use this section to identify potential partners and what they bring to your project.

Potential partner	Benefits the partner brings to project

Exercise 7—Considering the funders

Funding source	What does the funder want from the project?

Exercise 8—Budget

Budget template						
Wages and MERCS				**Wages**	**MERCS**	**Total**
Staff 1						
Staff 2						
Staff 3						
Expenses	**Travel**	**Hotel**	**Meals**	**Day care**	**Other**	**Total**
Staff 1						
Staff 2						
Staff 3						
Volunteer 1						
Volunteer 2						
Consultant fees and expenses		**Fees**		**Expenses**		**Total**
Consultant 1						
Consultant 2						
Facility purchase		**Capital costs**		**Financing costs**		**Total**
Facility 1						
Facility 2						
Facility rental						
Facility 1						
Facility 2						
Materials, equipment purchase, rentals			**Purchase**	**Rent**	**GST**	**Total**
Item 1						
Item 2						
Item 3						
Item 4						
Operating costs			**Purchase**	**Rent**	**GST**	**Total**
Advertising and promotion						
Copying						
Insurance						
Office supplies						
Phone/fax						
Postage						
Printing						
Shipping and freight						
Taxes and fees					**GST**	**Total**
Business tax						
Fees						
Permits						
Other expenses						
Expense 1						
Expense 2						
Expense 3						
					Total project costs	

Budget template

In-kind contributions	Total
Contribution 1	
Contribution 2	
Funding from each source	**Total**
Fees	
Products sold	
Funders	

Exercise 9—Funding source ranking sheet

Rank each funding source by assigning a value from one to 10 to each category. Ten is the highest score and one is the lowest. Higher scores represent the best opportunities.

Name of potential funder	Match with philosophy	Level of funding available	Likelihood of receiving assistance	Ease of applying	Successful past proposals	Total score
Foundation A	**5**	**3**	**8**	**2**	**0**	**18**
Foundation B	**3**	**7**	**4**	**7**	**4**	**25**

Exercise 10—Putting it in the proper perspective

The need you propose to address is . . .

_____

_____

_____

The individuals who will benefit from the project are . . .

_____

_____

_____

The benefits that will come from this proposal are . . .

_____

_____

_____

Exercise 11—Setting targets

The main goal of your project is . . .

The objectives of your project are . . .

Exercise 12—Putting the plans into action—Activity 1

List what you will do to meet the project goal and objectives.

How will this activity help meet the project objectives?

Who will be responsible for this activity?

Who will help the responsible person or persons complete this activity?

What work will they do?

When will they do the work?

How will their work be monitored?

How will the work be evaluated?

Exercise 13—Putting the plans into action—Activity 2

List what you will do to meet the project goal and objectives.

How will this activity help meet the project objectives?

Who will be responsible for this activity?

Who will help the responsible person or persons complete this activity?

What work will they do?

When will they do the work?

How will their work be monitored?

How will the work be evaluated?

Exercise 14—Putting the plans into action—Activity 3

List what you will do to meet the project goal and objectives.

How will this activity help meet the project objectives?

Who will be responsible for this activity?

Who will help the responsible person or persons complete this activity?

What work will they do?

When will they do the work?

How will their work be monitored?

How will the work be evaluated?

Exercise 15—Putting the plans into action—Activity 4

List what you will do to meet the project goal and objectives.

How will this activity help meet the project objectives?

Who will be responsible for this activity?

Who will help the responsible person or persons complete this activity?

What work will they do?

When will they do the work?

How will their work be monitored?

How will the work be evaluated?

Exercise 16—Putting the plans into action—Activity 5

List what you will do to meet the project goal and objectives.

How will this activity help meet the project objectives?

Who will be responsible for this activity?

Who will help the responsible person or persons complete this activity?

What work will they do?

When will they do the work?

How will their work be monitored?

How will the work be evaluated?

Exercise 17—Coming to the right conclusions

List, in point form, the information you would include in your proposal's conclusion.

Exercise 18—Summing it all up

List, in point form, the information you would include in your proposal summary.

Exercise 19—Promoting the proposal

List both the organizations and individuals you should contact for support for your proposal.

Exercise 20—Taking the next steps

List 10 things you will do to find funding for your projects following this Workshop.

1. _____

2. _____

3. _____

4. _____

5. _____

6. _____

7. _____

8. _____

9. _____

10. _____

Exercise 21—Workshop evaluation

1. List the three things you liked best about this Workshop.

   • _____

   • _____

   • _____

2. List the three things you liked least about this Workshop.

   • _____

   • _____

   • _____

3. How would you rate the *Participant's Manual* and *Participant's Workbook* for the Workshop?

	Very useful	Satisfactory	Not very useful
Usefulness	☐	☐	☐
Completeness	☐	☐	☐
Relevance to your own job	☐	☐	☐

Comments _____

_____

4. Do you think you will use the materials for reference after the Workshop? ☐ Yes ☐ No

5. How would you rate the facilitator for this Workshop?

	Excellent	Very good	Good	Fair	Poor
Knowledge of subject	☐	☐	☐	☐	☐
Style of presentation	☐	☐	☐	☐	☐
Ease of understanding	☐	☐	☐	☐	☐
Relevance of presentations	☐	☐	☐	☐	☐

Comments _____

_____

6. How would you rate your own participation in this Workshop?

	Excellent	Very good	Good	Fair	Poor
Attendance at Workshop	☐	☐	☐	☐	☐
Reading of materials	☐	☐	☐	☐	☐
Participation in discussions	☐	☐	☐	☐	☐
Completion of exercises	☐	☐	☐	☐	☐
Understanding of material	☐	☐	☐	☐	☐

Comments _____

_____

7. What do you think could be done to improve this Workshop?

_____

_____

_____

_____

_____

8. How would you rate the length of this Workshop?

Too long	Just right	Too short
☐	☐	☐

Comments _____

_____

9. Would you recommend this Workshop to others? ☐ Yes ☐ No

Why? _____

_____

10. Are you interested in taking other Workshops in the First Nations Housing Manager Training Program?

☐ Yes ☐ No

11. If you are interested in taking other Workshops in the First Nations Housing Manager Training Program, what subjects interest you the most?

_____

_____

_____

12. General comments about the Workshop.

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Notes