



Planning for Success

A Guide to Planning your Community-based Project



Atlantic Canada
Opportunities
Agency

Agence de
promotion économique
du Canada atlantique

Canada



About ACOA

The Atlantic Canada Opportunities Agency (ACOA) is an agency of the Government of Canada. Headquartered in Atlantic Canada, ACOA's goal is to help build economic capacity in the Atlantic region.

To this end, ACOA works with Atlantic Canadians to promote and strengthen local resources, foster partnerships and enhance community capacity to: create sustainable jobs; increase the availability of business capital; strengthen strategic planning; and encourage community participation and ownership relative to community economic development activities.

Commitment to sustainable development

ACOA is committed to protecting the environment of this region by promoting sustainable businesses and communities in Atlantic Canada.

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Fredericton, New Brunswick

Introduction

What is community development?

In economic development, community is defined as a geographic location, an industry sector or group of businesses or individuals of common interest.

Community development is defined as the planned evolution of all aspects of community well-being (economic, social, environmental and cultural). It is a process whereby community members come together to collectively generate solutions to common problems or take advantage of opportunities that will benefit the whole.

The scope of community development can vary from small initiatives within a small group, to large initiatives that involve the whole community. Regardless of the scope of the activity, effective community development should be:

- long-term
- well planned
- inclusive and equitable
- holistic and integrated into the bigger picture
- initiated and supported by community members
- of benefit to the community
- grounded in experience that leads to best practices

How to use this guide

This guide is designed to provide your community group with tips on how to move from a community idea to a community success. It will cover two key stages of community project planning:

1. “Preparing to set sail” will cover what should be done before you start to write your plan. This includes researching the issue or opportunity and the potential benefits and impact (i.e., what support is available and who should be at the table).

2. “Charting the course” will cover what should be included in your plan once all the preparation work, research and networking is complete. The plan is a practical tool that prospective funders will use to judge the potential of your idea and to engage the community. Your success in attracting funding support will depend greatly on your ability to provide a clear picture of your proposed activity.

Good luck with your project!



Preparing to set sail

Planning ahead. Before you start to write your plan, ask yourself the following questions:

Where are we going?

Looking at the map

At the initial stages of an idea it is critical to research the issue or opportunity in detail to ensure a clear understanding of where it is you want to go.

Why do we want to go there?

X marks the spot

It is important to identify why you want to go in a certain direction. This will assist you in evaluating the feasibility and value of the issue or opportunity, and in ensuring the objectives of your project are clear and consistent.

Who should be on board?

Building the right crew

It is crucial to have the right people at the table to best complement and advance your objectives. Consider who you should be consulting with to help further refine your project (e.g., community organizations, potential users, businesses, community sponsors, and advocates). In addition, you should consider not only who will be needed to develop and implement the project, but also who will support its ongoing operations (e.g., municipalities, associations, charity organizations, etc.).

Who can provide funding?

Finding a program that fits

Focus on and target potential funding agencies that are best positioned and most appropriate to your idea. You may also wish to contact the ACOA office nearest you to discuss your idea with a Program Officer and obtain direction and information on funding programs (see contact information at the back of this guide for the ACOA office nearest you). Consult potential funding organizations in advance to make sure your idea is a “fit” with their programs.



Charting the course

You are now ready to take the next step in the journey of transforming your community idea into a community success: writing your plan. The following provides insight on the four key elements of a well-written plan:

1. Description:

The project team and the project objectives, including all community partnerships and support for the project;

2. Dates:

The project start date and end date, as well as all steps to be taken and their estimated timelines;

3. Deliverables:

The project deliverables (outputs) and ultimate impact (outcomes);

and

4. Resources:

The human and financial resources (inputs) required and where those resources will come from.

Written successfully, your plan will answer the following questions clearly and concisely:

- Why should your project be undertaken?
- How will your project be implemented?
- Why should a private or public partner invest in it?
- Who will the beneficiaries of the project be?
- What measurable impact(s) will the project have?
- How will the project successes (impacts) be measured and communicated?
- How will the project be sustained beyond the initial funding stage?
- How does your project relate to the community's overall development/strategic plan?



1. Description

Project description

Describe your project in two or three paragraphs. Make sure that someone not familiar with the project can understand what is being proposed.

Objectives and activity

Outline your project objectives and explain how they:

- relate to the community need or opportunity;
- enhance community or regional capacity through the development of competitive, productive, strategic industry sectors;
- strengthen community infrastructure and improve upon the community's economic development capacity;
- relate to the economic development plan for your region or community; and/or
- enhance the community's capacity to overcome an economic development challenge and take advantage of the unique strengths, assets and opportunities of the community.

Organization and governance

Include specific details about your group or organization, such as:

- Profile and mandate;
- Legal status (i.e., non-profit/profit, federal/provincial) – be sure to include documentation to demonstrate this status (e.g., letters of incorporation, etc.);
- Names of board of directors;
- Names of those who have signing authority for the organization;
- HST # and supporting information relating to your GST rebate calculations;
- Details regarding your charitable status (if applicable);
- Most recent annual report;
- By-laws;
- Any required permits/licenses; and
- Previous audited statements and/or current financial statements.

Depending on the length of the documentation, consider including some of the above in appendices rather than in the body of your plan.

In the case of capital projects (i.e., projects involving land, buildings, and assets), you should identify any potential issues related to environmental regulation requirements as well as who owns the land, building or asset(s), and specify whether leases are in place or will be required.



Halifax, Nova Scotia

Project management

Demonstrate that the members of the project team have the necessary qualifications and experience to carry out the work. Include details such as:

- Qualifications – team members' résumés, references and related credentials;
- Experience – any supporting information highlighting the management team's capability to coordinate and manage the project;
- Representation – evidence that the management is well represented by geographical and cross-disciplinary project teams; and
- Roles – explain how each member of the project team will contribute to the work to be carried out.

Support

- Elaborate on the networking process you undertook and the organizations with which you consulted to develop this project. Include information such as the number of public meetings and/or structured consultations held, the number of people at the meetings and/or the people involved in the consultations.
- Explain how the project supports the regional economic development plans within the geographic area where you wish to implement the project.
- Provide a list of all partners (financial and non-financial) and their confirmed or anticipated roles/contribution to the project.

Partnerships

Does your project involve more than one targeted community (i.e., industry sector/geographic location/community of interest)? If so, specify the type of groups and the industry sectors, including:

- People and/or organizations in a specific geographic location (specify the type of geographic location, such as municipality, group of municipalities, region, province, etc.);
- Communities of interest (e.g., linguistic and visible minorities) and/or sectors;
- Linkages to your region's strategic work plans and/or initiatives;
- Contact information; and
- Any other information that is relevant to your project.

Can future partnerships with community groups be established? Include written confirmation related to anticipated support from relevant community-based organizations.



2. Dates

Milestones

Outline the proposed project activities and their estimated completion dates. Include:

- Time schedule for the implementation and completion of the project (project start date, end date); and
- Details of each specific step/activity involved in your project, including when it will start and when it will be completed.

3. Deliverables

Reporting economic impact and results

How will your project make a difference? Describe the lasting economic impact your project will bring, particularly as it relates to the original issue or opportunity you seek to address.

Explain how your project will contribute to a viable and more diversified community.

When preparing your plan, be sure it addresses the following questions:

- Is your project part of a regional or community plan?
- How do its anticipated results relate to that plan?
- What are the long-term development goals of your project?
- How, specifically, do you plan to achieve these goals?
- What direct economic impact do you anticipate from this project?

Sustainability

Think about your project in a holistic way. Consider its potential impact in terms of the economy, the environment, society, and culture – the four key elements of sustainable community development.

In the previous sections, you have already detailed how your project will improve the economic health of your community. Now identify how your project will impact the environmental, social, and cultural integrity of your community.



Moncton, New Brunswick

4. Resources

Project costs and financing

Detail the anticipated project costs and how those costs will be supported. Be sure to include:

- Estimated costs of each of the project activities (include quotes and their source).
- Proposed or confirmed financing partners of the project (provide any contribution agreements/copies of cheques and specify the amount).
- Proposed or confirmed partners providing in-kind contributions (specify each partner and their contribution). In-kind contributions are defined as a non-cash contribution that can be given a cash value (e.g., an accountant donating his/her time and expertise to the project). Pay close attention to relevant funding program guidelines on in-kind contributions before including them in your costs and financing.
- Cash flow projections. Simply put, cash flow projections are the difference between cash in (income) and cash out (expenses) over a period of time. Cash flow projections reveal the ongoing availability, or lack of availability, of cash over the course of the implementation of the project (see also “Viability” following section).

- Cost and timeline (e.g., Gantt Chart) for each activity involved in larger projects.
- Money or in-kind contribution your group is investing in the project. This investment is an indication of commitment and of the long-term viability of the project.
- Bridge financing capacity (if required). Bridge financing is a loan that is intended as temporary funding that eventually is replaced with permanent capital.
- Indication of how the project fits with your overall plan and operation, including your ability to manage and access funds.

Viability

Provide details of the future viability of the completed project by indicating how the initiative will be financed after completion. Include cash flow projections beyond the implementation stage (e.g., three-year cash flow). Also, indicate who will maintain the project. Remember that a project that requires ongoing long-term support from external sources is considered less “viable” over the long term. Your project should ultimately pay for itself and long-term viability of the project must be clearly demonstrated.



Final tips and tricks

Keep in mind that the supply of funding for community initiatives is often outweighed by demand. Also, remember that an assessment will be made of the strength of the plan and the benefits of the project to the community/communities. Given today's competitive and demanding environment, community groups should ensure their proposals provide:

- **Clarity of purpose** – outlining clear objectives, outcomes and scheduled time frames.
- **Value for money** – establishing a realistic budget/cash flow and making every cent count.
- **Accountability** – ensuring strong internal controls and governance practices (organizational and financial).
- **A committed community** – pulling together an effective board, committed volunteers, and qualified staff.
- **Strategy and coordination** – articulating that the project addresses an existing need and has a clear link to local, regional and national plans and priorities.
- **Real results and future continuity**
 - describing an evaluation plan and final report on results, and confirming sources for continued resources for the future sustainability of the project.

For more information,

contact the ACOA office nearest you:

New Brunswick : 1-800-561-4030

Prince Edward Island: 1-800-871-2596

Newfoundland and Labrador:
1-800-668-1010

Nova Scotia: 1-800-565-1228

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