

Writing Great Grants - Project Planning – An M.J. Murdock Charitable Trust Podcast

Colby Reade: Welcome to the M. J. Murdock Charitable Trust Podcast on writing great grants. We're a private nonprofit foundation serving the Pacific Northwest, where for more than 44 years, we've awarded more than \$1 billion in grants to organizations that serve and support our local communities. On this podcast, we want to share insights and information to help nonprofits flourish and thrive in order to serve the common [00:00:30] good.

On today's episode, our host, Steve Moore, executive director of the Murdock Trust, sits down with Lorin Dunlop to talk about project planning. Lorin is one of the Trust's extremely talented program directors. She joined the trust about five years ago after an extensive career supporting nonprofit and community groups through the grants process, with roles at organizations like the Oregon Criminal Justice Commission, the University of Nebraska Medical Center, and the Regional Arts and Culture Council. Enjoy the conversation.

Steve Moore: [00:01:00] Today, we will want to talk about project planning and strategic planning and why that is so important to an organization, but also to a particular project that someone may want to ask for support from a foundation, such as the Murdock Trust. Lorin, let's jump right in.

Lorin Dunlop: You bet.

Steve Moore: Let's talk a little bit. Why is it so important for an organization to be strategic and [00:01:30] thoughtful whenever they're planning a potential project and a grant application to support that? Why's planning important?

Lorin Dunlop: Well, planning takes resources. Planning takes time. Planning takes people, and it's expensive. It can have some expense to it. When you are looking at your core mission, it's often that these projects are born [00:02:00] out of and should support the core mission of the organization. When a good project comes to us, it's often, and it should be, supported by the strategic plan that ultimately supports the mission of the organization.

Planning is something that we look at quite carefully when an organization comes to us with a project. It takes different forms. Whether you're planning for building a brand new 20, 000 [00:02:30] square foot building, a new museum, for example, or you're planning to hire your first paid staff, or you're planning to purchase some equipment for a radio station, there is a roadmap that you should lay in front of you before you decide exactly all the pieces you're going to put together.

Steve Moore: Yeah, that's a great one. I love that you've got a roadmap right here with us that you're looking at kind of as a visual pop reminder.

Lorin Dunlop: [00:03:00] I do. I feel like planning is like unfolding a roadmap. With each section you unfold, you see more of the picture. And by the time you finish unfolding the map, you see the whole picture. You may have had some detours.

You may have had some help along the way, but it's a good visual and it's a good reminder that it's with careful planning that you eventually get from point A to point B.

Steve Moore: I want to really emphasize what you pointed out early on, and that is connecting [00:03:30] these plans, a project directly to the mission, because really the projects and programs that an organization does are the expression of the mission. Oftentimes people are so busy doing the work of the organization, they just don't have the time. We hope that our grant application process provides the time and the space, the questions and the thinking to help organizations [00:04:00] to plan.

So maybe you could mention what are some of the questions that an organization should ask as they begin and guide their planning?

Lorin Dunlop: The overarching question— and sometimes this is informed depending on the project itself. For example, if you were taking on a large project, like the building of a new museum, part of that planning might be or should be, perhaps, a market [00:04:30] study, which essentially tells you, should we do this? Is there a need?

From there, you can go forward and find out if the answer to that question is yes, then perhaps a feasibility study helps you with another part of the planning, which is, do we have the support from our family of supporters, from the foundations, government, and general public? Those are two really good planning tools [00:05:00] to help inform those questions.

But when you start the planning process, what's really important—I have discovered as a program director and my colleagues would say the same— is that you don't do planning in silos. Planning involves the core leadership around the organization. That can be the executive team. It can be support staff department staff. It'll be the board [00:05:30] for sure, and then it'll also be your family of supporters, your donors, the general public.

Planning shouldn't be done in silos. From the very beginning, if there is a strategic plan, a strategic project, I should say, that the organization is hoping to bring forward, it needs to be on the table for many voices to speak into. If this doesn't happen in the beginning, it can [00:06:00] cause some disruption, I think, along the way.

Steve Moore: Yeah, great, great point. We often talk about project planning and execution, but it's that project planning that lays the groundwork for successful execution. As you think about meeting with organizations, you've seen some good ones and you've seen some that were not quite prepared. What would characterize a well-planned project? [00:06:30] Just two or three things that you say, "I love it when I see this in an organization." And maybe what are a couple of things that sometimes worry you when you see an organization?

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- Lorin Dunlop: The thing that I appreciate most is that when an organization... I would say the key thing is that they give themselves the time. In our current society, everyone wants to do everything right then and there, but really we have to step back [00:07:00] and give ourselves the time. And that is often when I see a successful project is that they have done that well. Is that six months? Is that 12 months? Is that two years? Whatever the case might be, that is always a key ingredient.
- It's never something that's shot out of the hip pocket. That would be key, having really thoughtful people around the table and listening to everyone who might be involved [00:07:30] in the project.
- Steve Moore: Or implications to what that project may bring to their work or the organization.
- Lorin Dunlop: Bringing in people from the outside, having those voices speak into it. I've seen that worked very well with many projects. And that's part of the discovery process, right? Having many voices around the table. Part and parcel of planning is the financial piece of it too. Can [00:08:00] we do this? Can we pull this off? Not just, say, the bricks and mortar for building a new museum, but can we sustain it?
- We have many good tools that we employ, that we offer to organizations to use, but when I see a really well-planned project come forward, they have done their homework, and they have used those tools to set forth the process of getting to, like I said, from point A to point B. That [00:08:30] would be probably the key to me is the time allowed and the right people around the table and reaching out to folks in the community to make sure that it's a project that is really going to really well support the organization. You asked another question.
- Steve Moore: Yeah. Also, then you think about what is it that worries you sometimes when you're visiting with an organization and you say, "Oh no, they lack [00:09:00] some things," and some examples of that might be what?
- Lorin Dunlop: Well, clearly some examples that come to mind would be the sustainability of a project. It's easy enough to maybe pull the funding together to say, build a building or hire an individual. But if they don't plan for the sustainability, it's going to be failed eventually. It's not going to come off successfully. Those [00:09:30] are often conversations that we have, the program directors, at the site visit with an organization, where we can see clearly in the application that that piece wasn't really developed yet.
- Steve Moore: Yeah, that's great.
- Lorin Dunlop: Oftentimes those organizations, that's why they value the feedback from the trust is they go back in and then they start looking at the big picture, the long haul.

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Steve Moore: Oftentimes in the nonprofit community, we see individuals or groups [00:10:00] with a lot of vision and inspiration and not always so much great planning. But they kind of think, "Well, our amount of vision we have and the inspiration behind our mission, that should carry us." Why is that not enough to carry you?

Lorin Dunlop: Because in the end, it's a business. You have to run your organization in sustainable business-like manner. There has to be a sustainable business [00:10:30] model. And if that is there, then the vision can be carried forward. But vision doesn't pay salaries. Vision doesn't pay the rent. We often have I call it holding up the mirror at the site visits and say, "This is what we see." That's a great piece of what we do, I think, is that we have those conversations with organizations and we give them an opportunity to step back and think about [00:11:00] it.

Steve Moore: Give us an example of an organization that you maybe recently saw receive a grant and you said, "They did such a great job at planning that."

Lorin Dunlop: Oh, well, I can think of a wonderful organization, Benton County, the Benton County Historical Society. Wonderful organization. It's been around for several decades.

Steve Moore: Not a gigantic organization either.

Lorin Dunlop: Not a gigantic organization, but they have an [00:11:30] incredible leadership team. The board has always been there as part of that support around the leadership team. The community is excited by the work they do, and they systematically over the years built the core structure of what they needed to support that historical society, that museum, from the buildings to the endowment, [00:12:00] to now a beautiful new—I would call it like a little jewel box museum designed by one of the more world-renowned architects, or to us well-known in the United States.

They did that in such a way that it didn't... It was really supported by the community, and it is going to be such a cultural asset, not just to that [00:12:30] region.

Steve Moore: It's really an anchor institution now for the community.

Lorin Dunlop: And in an unlikely place. It's not in a huge city. It's in a beautiful campus college town, but it's exciting. They did a tremendous job.

Steve Moore: How important is it for an organization to know of other organizations that do similar work and to kind of learn from the successes and failures of others?

Lorin Dunlop: It's really important, Steve. It's [00:13:00] one of the things as program directors we try to be a linkster, I think. I don't know if that's a word.

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- Steve Moore: It's a great word. If it's not, it should be.
- Lorin Dunlop: We do that, again, in our interaction with organizations. I know all of us do that in our site visits. We'll say, "Hey, here's an organization that's gone through exactly what you're going through. Let me connect you," because that's where you really learn is that peer-to-peer learning, I think. People who've been in the trenches, people who've been there, done [00:13:30] that, got the t-shirt, they are the folks that you want to connect them with.
- That is a really fun part for us as program directors is to bring organizations together. We do that often at Founder's Day. We literally walk one person over to the next organization and say, "You guys should talk."
- Steve Moore: Yeah, that's a great example of that as well. It's equally worrisome when you're meeting with a group and you ask them, "What have you learned [00:14:00] from other groups?" And they say, "There's nobody else that's doing the amazing work that we're doing."
- Lorin Dunlop: Yes. That would be unusual to know that an organization is so completely unique that they have no other peer. That would be unusual and probably that's, again, where we kind of step in and say, "Well, maybe they're not exactly like you, but I think they're similar enough that you might want to have a chat with them. Reach out."
- Steve Moore: We [00:14:30] often say that anyone who's received a grant—because we list our grants on our website—anybody that's received a grant from us becomes part of the learning circle. They can share and teach and instruct others as they are working on, say, adding a development officer or planning a new capital project or launching a new program. We encourage and think that's an important part of the ecosystem.
- Lorin Dunlop: One of the resources we draw [00:15:00] from, Steve, are the final reports actually that come in. There's one section on our final report, it's Lessons Learned. I read those and I enjoy reading them because then when I am meeting with another organization, I'll say, "You know what? I know this organization just went through this. They hit that same wall and here's how they resolved it." That's a part of what we do, again, as the Trust. We really help to bring a lot [00:15:30] of information to the organizations we're working with, whether they're funded or not.
- Steve Moore: Yeah, that's a great example of being a learning organization, which is another important part of that project planning and execution is to bring the learnings from prior projects into the current experiences and what you're doing as you plan going forward. What would be something that you would recommend to a leader or a board, say, as [00:16:00] they're just launching into project planning and execution? As you think about your roadmap, what are two or three things that they should do as they plan the roadmap?

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Lorin Dunlop: Depending again on the size of the project, they might involve a consultant if it's a large project.

Steve Moore: Like a guide. Someone to guide them through.

Lorin Dunlop: Exactly. Someone to guide them through. That would be, again, depending on the size of the project. [00:16:30] I would look at things like, who else has been funded in this area and how successful was it? Don't be afraid to just look at a 10-mile radius. I mean, look in the region. Look in the Pacific Northwest. There are examples that can speak into what they're doing that can be helpful. That would be one of the suggestions. I would also think that they would want to [00:17:00] bring their staff in and have sort of one of those discovery conversations.

Your staff is there to help support the mission. Sometimes, and I've been in enough site visits to know, sometimes it's recognizable that the staff hasn't been maybe on board. And that's important, I think, because that's part of a good culture and helping the organization to do [00:17:30] the work that they do. Planning, again, shouldn't be in silos. Now, admittedly, when you get down into like the real nitty-gritty of the planning, sometimes you have to have subcommittees or ad hoc committees. But in the beginning, it should be laid out for the organization, for the board.

What is it that we're hoping that this project will bring to us as an organization? And then as you fold in and as you learn more, you can get more specific [00:18:00] and have individuals kind of assigned to get more information and to go into a little bit deeper. Another suggestion I guess I would make too is making sure that... Planning costs money and it causes stress on staff.

Again, you're giving yourself, allowing yourself the time for the planning, so it's not so concentrated [00:18:30] that it just falls apart because people are so stressed, they can't quite get to it. That would be one suggestion or a couple suggestions.

Steve Moore: That's great. I think about just recent convenings that we've had at the Trust, the nonprofits working in the area of microfinance, for example. And as they connect and learn from each other all across the Pacific Northwest, they realize that they've got [00:19:00], in a sense, partners that they can ask very specific questions in their particular sub sector that are helpful, or even in an area that you work a lot with, like our historic theaters and performing arts centers.

Lorin Dunlop: Yeah, that's right.

Steve Moore: You think about some of the ticketing and marketing and the work through the DeVos Arts Initiative that brought together lots of arts organizations and sharing. [00:19:30] We are seeing the results of that, some of the fruit of that now.

Lorin Dunlop: Absolutely. It can't be stressed enough that when you have the opportunity to bring peers into connection with each other that there's a support system there that is priceless really, so that those organizations know that they're not just doing this on their own. Like you said, it's part of an ecosystem. And that is [00:20:00] what really builds a rich support for the nonprofits in our region. You need to learn what other folks are doing in your field, so that you can share resources in an efficient way.

Really the ultimate goal is to serve, to serve more and to serve in a way that really lifts people up, whether that's the arts or health and human services [00:20:30] or scientific research. There's so much that these organizations are doing. The more that they can come in contact with each other, Steve, is beneficial to the whole.

Steve Moore: We love to see when organizations, when that light bulb goes on, and they successfully execute a new project or a program and the mission is fulfilled in a greater expanded way. [00:21:00] Let's talk a minute about boards. What's the role of a board of directors or a board of trustees and what would be our expectations in terms of both their part in the planning, but also the buy-in?

Lorin Dunlop: Well, the board obviously has the oversight and the governance of the nonprofit, and they are there to make sure that the organization is staying on course with the mission, that from the fiduciary [00:21:30] side of things, things are well-managed. The board is key and the board has to be engaged with the project. From the beginning, the board should be involved and know what the project is going to do for the organization. If they find that this is something that supports the mission, the board has to have the buy-in.

The board is there [00:22:00] because they are such a critical part of the core leadership. The board part of the planning should begin, in our experience, it should be there in the beginning. They shouldn't be brought in after things have been down the road quite a ways. Now, on a larger project, the board oftentimes will do an ad hoc committee and they'll say, "We want the committee to speak into this, to work with the [00:22:30] staff, to work with a consultant." And then that committee comes back and informs the full board at appropriate times along the process.

And then, of course, the board supports the organization financially. They are coming alongside the ED and the development department to go out there and find the support, the financial support. They, one would hope, would also be supporting [00:23:00] the organization financially because they believe in the mission. They believe in the work that's being done. They are engaged.

Steve Moore: We often say that we expect boards to be involved in terms of their work, their wealth, and their wisdom. Is there a certain percentage we're looking for in terms of board support or that should be expected of boards that are supporting an organization?

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Lorin Dunlop: Well, we would hope that 100% of the board can support [00:23:30] the organization, and we always ask that question. Is there board support, not just for a project, but for ongoing operations, for general operations each year? We ask that question. The organizations that we see that are doing well, the board is supporting them, both in projects and in general support. There's always a case where someone might not be able to support financially, but they do [00:24:00] a lot in kind.

And of course, Steve, as you imagine, every board, depending on the size of the organization, the Seattle Opera Board is going to be quite different from a small community theater in Kodiak, Alaska. There's a range. There's no set number amount, but we would expect 100% engagement. We would hope for 100% engagement.

Steve Moore: Yeah. The context is everything. We want them to [00:24:30] help us understand that context. Well, this has been really fantastic, Lorin. Is there one other point that you would want to be sure and make to an organization as they think about the kind of project planning and strategic planning for a potential project and a grant request? Any final thoughts that you would want a group to be aware of?

Lorin Dunlop: Well, one of the things that comes up to us quite often [00:25:00] is, oh, when can we get this in? When's the deadline? When's this? It's always kind of refreshing to be able to say, "We have no deadlines. You come to us when you're ready, when you have your highest strategic capacity building project that you know is well-prepared." That is what I would like to impart and I often do with organizations.

I say, "The Murdock Trust isn't going anywhere. Take [00:25:30] your time and come to us when the map has been unfolded, right? And you've seen the whole road and you know how you're going to get from point A to point B."

Steve Moore: That's fantastic. I think you can see why people love it whenever Lorin Dunlop is assigned as a program director to help them guide their steps in this process.

Colby Reade: And that wraps up this episode of the [00:26:00] M. J. Murdock Charitable Trust Podcast. For more information on writing great grants, as well as resources on fundraising, board development, leadership, team management, and a variety of other topics in the nonprofit space, please visit our website murdocktrust.org. This episode of the M. J. Murdock Charitable Trust Podcast was recorded at the Luis Palau Association Studios in Beaverton, Oregon. Episode produced by Colby Reade, with sound engineering by Doug Steward, and special thanks to Kaedyn House. Music by Lobo Loco via [00:26:30] the Free Music Archive. Copyright M. J. Murdock Charitable Trust, 2020. All rights reserved.