The ABCs of Grant Seeking

Presented by

Sharon Neal

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Your Instructor

Sharon Neal has many years of experience in the philanthropic community as grant seeker, a grant maker, and a grant administrator. She hopes to help demystify the stages of the grant seeking process from identification to stewardship.

She is currently the Director of Foundation Giving at UT Southwestern Medical Center.

Objectives for today

- Get ready to seek grant funding
- Clarify the project to funded
- Identify possible funding sources
- Recognize the key components of a competitive proposal
- Learn how to prepare and submit proposals
- Plan next steps after the grant is awarded or declined

Truth about grant seeking

- It is very competitive
- Best way to get a grant - Follow the instructions
- If you don't write the proposal, you won't get the grant
- Grants take time
- Grants will not help you start your nonprofit
- Funders don't care what you need
- Good applications can be helped to the top
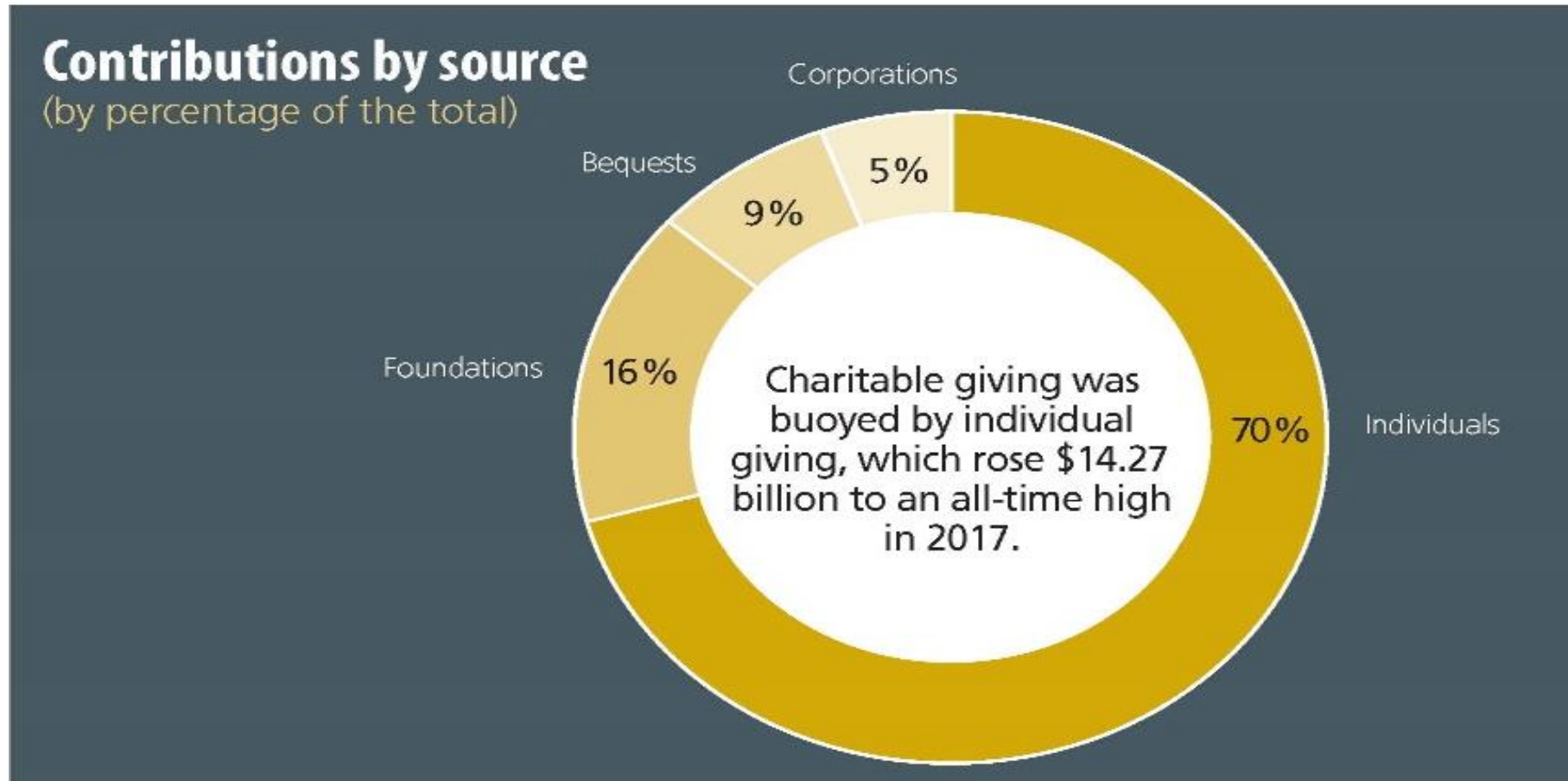
What this class is not

- A writing and grammar class
- Evenly balanced between private and public funding

2017 Contributions: $410.02 Billion

Source: Giving USA Foundation | *Giving USA 2018*

2017 Contributions: $410.02 Billion

Contributions by recipient category
(by percentage of the total)

- Environment/animals **3%**
- **2%** To individuals
- International affairs **6%**
- Arts, culture, and humanities **5%**
- Public-society benefit **7%**
- Religion **31%**
- Health **9%**
- Gifts to foundations **11%**
- Human services **12%**
- Education **14%**

Eight out of nine major charitable subsectors saw increased contributions in 2017, compared with 2016.
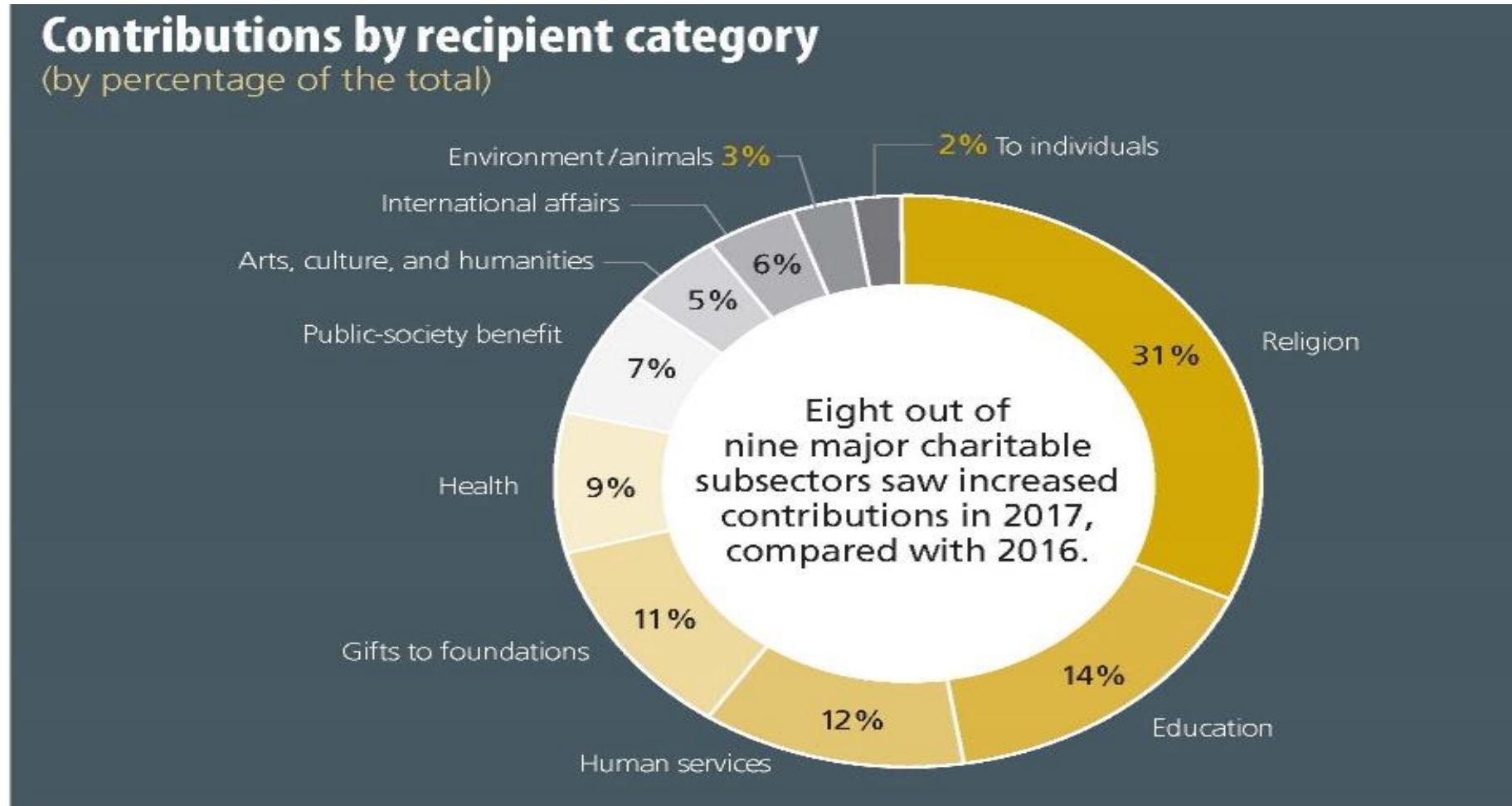
Source: Giving USA Foundation | *Giving USA 2018*

Sources of grant funds

- Government sources (Public)
  - Federal
  - State
  - County
  - City
  - Any municipal funding

- Foundations
  (Private or philanthropic)
  - Independent
  - Corporate
  - Operating
  - Community

Types of foundations

- Independent (private) - Endowed funds from a single source
- Corporate - Funded by contributions from a corporation
- Operating - Established to benefit one non-profit organization
- Community - Pooled funds from multiple donors
  - Unrestricted
  - Field of Interest and Named Funds
  - Donor Advised

Types of grants

- Capital
- Endowment
- Operating
- Project or Restricted
- Challenge
- Matching
- Research
- Seed

The basic elements of grant seeking

- Organizational readiness

- The four Ps:
  - **PROSPECT** identification & alignment
  - Impact of **PEOPLE** and relationships
  - **PROJECT** to be funded
  - Quality of the **PROPOSAL***

Organizational Readiness

Are you grant ready?

What does it mean to be a "grants-ready" organization

Two levels of grants readiness

- Culture and Infrastructure

- Documentation and Resources

Culture and infrastructure

- Mission, Vision, and Values
- Reputation and track record
- Leadership (staff and board)
- Long-term change, not short-term fixes
- Ongoing partnerships
- Effective communications
- Clearly stated policies and procedures
- Strategic and operational planning
- Systems to manage, track, and report

Documentation and resources

- Mission, Vision and Value Statements
- Strategic Plan – translating vision into action
- Case Statement – a basic blueprint
- Program descriptions (needs, priorities, clients, services, staffing, etc.)
- Financial documents and systems – audit, operating and program budgets
- Development and marketing plans
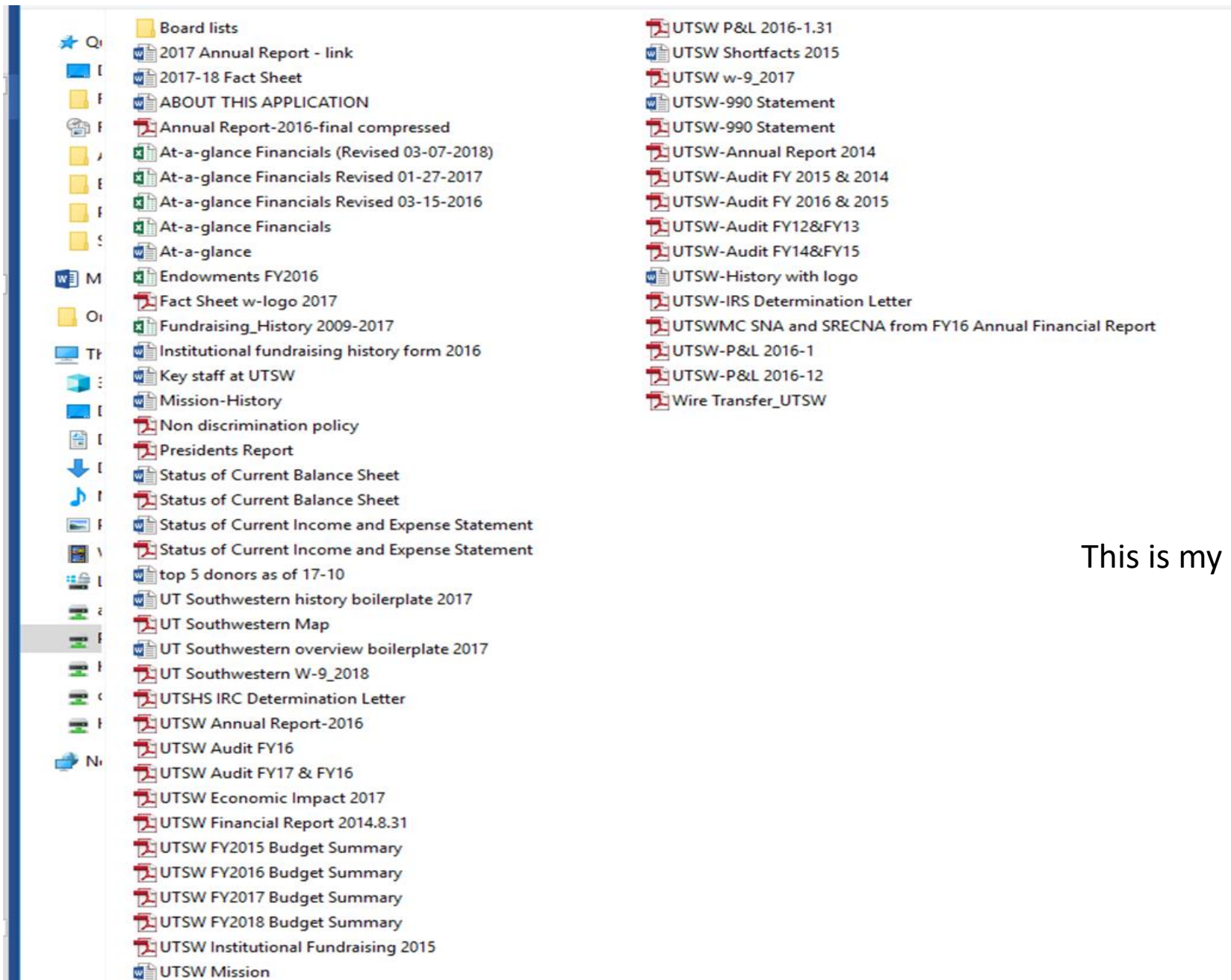- Program tracking and recordkeeping

Organized grant writer

GET TO KNOW YOUR ORGANIZATION

- People info – org charts, bios of key people
- Descriptions of current projects & programs
- Extraordinary accomplishments, awards, media
- Publications (annual reports, newsletters, etc.)
- Interview program staff

My "Org Docs" folder

- At a glance file –
  - contact info; EIN; budget $$-income and expenses; # employees, clients/patients/students, volunteers; MVH
- Board lists/rosters
- Key staff bios, titles
- Financials: Ops budget, 990, Audit
- 501c3 tax determination letter
- Annual report, Fact sheets, 1st, best & only

📁 Board lists	📕 UTSW P&L 2016-1.31
📄 2017 Annual Report - link	📄 UTSW Shortfacts 2015
📄 2017-18 Fact Sheet	📕 UTSW w-9_2017
📄 ABOUT THIS APPLICATION	📄 UTSW-990 Statement
📕 Annual Report-2016-final compressed	📕 UTSW-990 Statement
📊 At-a-glance Financials (Revised 03-07-2018)	📕 UTSW-Annual Report 2014
📊 At-a-glance Financials Revised 01-27-2017	📕 UTSW-Audit FY 2015 & 2014
📊 At-a-glance Financials Revised 03-15-2016	📕 UTSW-Audit FY 2016 & 2015
📊 At-a-glance Financials	📕 UTSW-Audit FY12&FY13
📄 At-a-glance	📕 UTSW-Audit FY14&FY15
📊 Endowments FY2016	📄 UTSW-History with logo
📕 Fact Sheet w-logo 2017	📕 UTSW-IRS Determination Letter
📊 Fundraising_History 2009-2017	📕 UTSWMC SNA and SRECNA from FY16 Annual Financial Report
📄 Institutional fundraising history form 2016	📕 UTSW-P&L 2016-1
📄 Key staff at UTSW	📕 UTSW-P&L 2016-12
📄 Mission-History	📕 Wire Transfer_UTSW
📕 Non discrimination policy	
📕 Presidents Report	
📄 Status of Current Balance Sheet	
📕 Status of Current Balance Sheet	
📄 Status of Current Income and Expense Statement	
📕 Status of Current Income and Expense Statement	
📄 top 5 donors as of 17-10	
📄 UT Southwestern history boilerplate 2017	
📕 UT Southwestern Map	
📄 UT Southwestern overview boilerplate 2017	
📕 UT Southwestern W-9_2018	
📕 UTSHS IRC Determination Letter	
📕 UTSW Annual Report-2016	
📕 UTSW Audit FY16	
📕 UTSW Audit FY17 & FY16	
📕 UTSW Economic Impact 2017	
📕 UTSW Financial Report 2014.8.31	
📕 UTSW FY2015 Budget Summary	
📕 UTSW FY2016 Budget Summary	
📕 UTSW FY2017 Budget Summary	
📕 UTSW FY2018 Budget Summary	
📕 UTSW Institutional Fundraising 2015	
📄 UTSW Mission	

This is my "Org Docs" Folder

At a glance

The University of Texas Southwestern Medical Center
5323 Harry Hines Blvd.
Dallas, TX 75390
Phone - 214-648-3111
Dev Fax- 214-648-4771
Dev office: 214-648-2344
www.utsouthwestern.edu

74-6000203 – IRS–UTSW
75-6002868 – TX UTSW
75-0945939 – IRS- SWMF

2017-18 Budget - $2,857,454,237
UT Southwestern spends 97.8 percent of each dollar on direct program services.

Daniel K. Podolsky, M.D.
President
Daniel.podolsky@utsouthwestern.edu
214-648-2508
MC- 9002

Southwestern Medical Foundation
Parkland Hall at Old Parkland
3889 Maple Avenue, Suite 100
Dallas, TX 75219
Phone: 214-351-6143
Fax: 214-352-9874
www.swmed.org
www.facebook.com/SWMedicalFoundation
Kathleen Gibson
President

Mission
UT Southwestern Medical Center has a four-part mission:
• To improve health care in our community, Texas, our nation, and the world through innovation and education,
• To educate the next generation of leaders in patient care, biomedical science, and disease prevention,
• To conduct high-impact, internationally recognized research, and
• To deliver patient care that brings UT Southwestern Medical Center's scientific advances to the bedside — focusing on quality, safety, and service

Prospects

Finding a good match for your funding needs

Prospect identification

Periodicals:

- Chronicle of Philanthropy
- Nonprofit Times
- Local Business Journal, Book of Lists
- Local newspaper columnists
- Annual reports from similar organizations

Other sources:

- Keen eyes/help from friends

More prospect Identification

Online Foundation directories:

- Foundation Center - www.foundationcenter.org
- FoundationSearch - www.foundationsearch.com

Today, we will use Foundation Directory Online, which is available at no cost at Funding Information Libraries, such as…

- Center for Civic Engagement in El Paso
- Community Foundation of West Texas in Lubbock
- Nonprofit Management Center of the Permian Basin in Midland

And more prospect identification

- Online sites
  - Grantspace.org
- Bank managed trusts
  - https://www.bankofamerica.com/philanthropic/grantmaking.go
  - https://www.jpmorgan.com/country/US/en/jpmorgan/private_bankin g/foundations/online_grant_application/search
  - https://www.wellsfargo.com/private-foundations/

Prospect research and vetting

- The purpose of research is to NARROW the list of suspects into viable prospects

- Sources:
  - Back to the online directories
  - Foundation's website
  - Foundation's 990
  - Guidestar (www.guidestar.org)

RFPs

Used primarily by government agencies

- Federal government - https://www.grants.gov/
- Federal register - https://www.federalregister.gov/
- State government - https://egrants.gov.texas.gov/

Some foundations issue them too.

- Private funders - http://philanthropynewsdigest.org/rfps

The grant calendar

- A map for future grant success, to keep you focused, on time, and in charge of the details.
- Choose a format with headings:
  - Prospect name
  - Deadline, type deadline
  - Field of Interest (FOI)
  - Last $$, LG date – if a previous donor
  - Most recent Assets, Giving
  - Average gift size

Grant Calendar

Org Name	FOI	Last Gift $	Last Gift Date	Deadline Type	Deadline	Request Name	Proj Ask $	Notify Date	Notes
Abe Zale Foundation		5,000.00	4/12/12						not a prospect-LG-Disaster Relief
Agnes Cluthe Oliver Foundation		*9,000.00*	*12/10/12*	*Hard*	*9/30?*		*10,000*		
Aileen & Jack Pratt Foundation		500.00	11/6/12						CCB honoree
Al & Lenore Chilton Foundation	Children, Human Svcs	2,500.00	3/24/11	Soft		??	10,000	10/31	BoA managed trust
Amon G. Carter Foundation	Fort Worth	2,000.00	12/12/12	Soft				10 days after Bd mtg.	Major & Katherine have set up meeting
Ann L. Rhodes & Carol Green Rhodes Charitable Trust	Tarrant County - Human Svcs, arts	2,700.00	12/2/09	Hard-Multi	3/31				BoA managed in FW
Ann L. Rhodes & Carol Green Rhodes Charitable Trust	Tarrant County - Human Svcs, arts	2,700.00	12/2/09	Hard-Multi	9/30				BoA managed in FW
Anne T. & Robert M. Bass Foundation	Fort Worth	25,000.00	12/28/12	NUA			25,000		Preselects recipients - relationship, not proposal
Arlington Tomorrow Foundation	Arlington			unk		YET	100,000		
Attorneys Serving the Community	Children, DV			Hard	2/28	DV	10,000		
B.B. Owen Trust		*200,000.00*					*200,000*		*Designated beneficiary - 3yr of 3 year pledge*
Bank of America - Neighborhood Builders	Capacity			Hard	8/12	Vet Prog	200,000		By invitation only
Bank of America Merrill Lynch Foundation-Critical Needs		625.00	12/18/12	Hard-Multi	8/2	Sheltercare	50,000	11/30	
Bank of America Merrill Lynch Foundation-Workforce Development				Hard-Multi	1/22-2/15				

People

The importance of relationships

People give to people

- Find a link to help connect with funders
  - Maybe a board member or a volunteer

- Finding "people" connections to funder is vital

- People connections are the most effective way to reach small family foundations

Identifying connections

- Create a prospect questionnaire

- Circulate or interview possible links

Prospect Questionnaire

Respondent Name:	I know this person		Use my name		I will help approach		
	Very well	Casually	Yes	No	Intro Letter	Phone Intro	Visit
Abbott (The) Foundation							
Gary Abbott - Pres.							
Shawn Abbott - VP							
Abell-Hanger Foundation							
Wes Perry							
James I. Trott							
Mark Palmer							
Herbert L. Cartwright							
John Bergman							
Jack Harper							
Trevis Herd							
Elaine Magruder							
David L. Smith							
James Troutt							
Rick Coats							
Herbert Cartwright III							

Build relationships with funders

- Don't just drop proposals in the mail or fill out online grant applications
- Call or contact the program officer
  - Socialize projects - discuss their interests & your project to confirm if it's a good fit
  - Confirm deadlines, guidelines, current address, etc.
- Briefly explain your project - You might learn some unexpected information

The project to be funded

The intersection of community needs and your organization's ability to meet those needs

Where to begin?

- The most important part of the project is the problem
- Its the reason we write the proposal
- Focuses on the beneficiary not the organization's needs

Start with three questions to define the problem

- What?
- So what?
- Now what?

What? - Describe the problem

- What is incidence & extent
- What is the cause(s) or contributing factors
- Who is affected/impacted? (that you plan to serve)?
- Geographical area impacted?
- How is need measured?
- What are the costs?

Ways to document the problem

Provide the "just the facts"

- Demographic information clearinghouses, federal and state agencies, scholarly journals and articles, industry publications, etc.
- Search engines, like Google
- Knowledge-bases, like Wikipedia
- Surveys
- Interviews w/clients, local officials, experts
- Client records
- Human interest stories

So What? Define why the problem is important

Answer questions such as…
- Why is it important?
- Why should you care?
- Consequences of no intervention?
- Urgency – Why now?

Now what?

- Describes your organization's solution to the problem
- It fills the gap between what exists and what ought to be
- This is the project to be funded

   AND

- The purpose/goal of the proposal

Logic Model

"A logic model is a systematic and visual way to present and share your understanding of the relationships among the resources you have to operate your program, the activities you plan, and the changes or results you hope to achieve."

W.K. Kellogg Foundation
https://www.wkkf.org

Logic Model Components

- Need/Problem Statement: Defines the problem your program addresses
- Goal: The purpose of your program – Now what?
- Resources: Describes what must you have to achieve the goal
- Activities: Tells what will you do with your resources
- Outputs: Shows the tangible products of your activities
- Outcomes: Outlines the changes you expect to occur as a result of your work

Typical Logic Model

Problem Statement: _____

Purpose/Goal: _____

Resources needed to operate the program

If you have the necessary resources, *then* you will implement these activities

If these activities are implemented, *then* some service/product will be produced

If these activities are accomplished, *then* clients will benefit in these ways

If these benefits to clients are achieved, *then* changes in organizations or communities will occur

Resources/ Inputs → Activities → Outputs → Outcomes → Impact
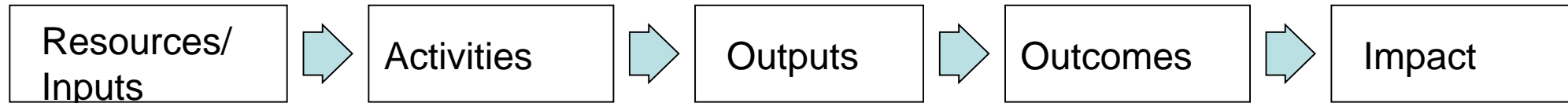
Problem: 10 million visually impaired people in US and only 10,000 active guide dogs

Goal: Improve mobility and quality of life of the visually impaired with highly qualified guide dogs

Input/Resources	Activities	Outputs #	Outcomes %	Impact
Engaged Board	Select qualified human participants	25-35 trained dogs/year are placed; remainder are still in training or adopted to pet homes	81% of recruited dogs that are adopted complete training and earn their certification with their partner	1,000 dogs rescued from shelters
Qualified Leadership	Recruit dogs from shelters	80+ rescue groups/shelters visited each year	90% of individuals who request service dog that receive a service dog	People with disabilities increase or maintain independence with the assistance of their dog 24/7
Trained Staff	Dogs enter intensive training	50 dogs selected from animal shelters for training/year	96% of individuals successfully complete their training	800 dogs placed with individuals since inception
Supporters/Funding	In-take requests for service dog placement; maintain waiting list	Each dog serves partner 24/7 by performing routine task, and saving lives in emergencies.	90% of placements successfully re-certify each year; approx. 10% retire	outreach: national expert/ consultant on service dog training and accessibility issues
Volunteers	Monitor and train in-home	900 hours training/dog provided	97% of individuals receiving a service dog are pleased after first year of placement	
Training Curriculum	Annual re-certification of each placed dog/human team	20-30 youth provide early service dog training through a formal rehabilitation program.		
State of the art facilities				

Writing the proposal

Putting it all together

Types of Proposals

- Letter of Intent (LOI)
- One page or letter proposal
- Full proposal
- Online applications and
- Common grant application

Letter of Intent

- Purpose is to introduce your idea to determine interest
- Funder may request as initial approach
- Usually 2-3 pages
- Summarizes the project
- Describes the need, outlines the plan to meet it, and how the projects fits the funders priorities.

Letter Proposal

- Not the same as LOI
- Usually 2-3 pages
- Describes:
  - The project – why, what, how, timeline
  - Your organization
- Includes a monetary request

Full proposal

- Length ranges from 4-25 pages
- Usually follows a common format
- OR funder's recommended format!

Components of a Full Proposal

1. Cover letter
2. Executive Summary
3. Needs Statement
4. Goals and Objectives
5. Methods, Implementation or Program Design
6. Evaluation
7. Sustainability and Other Funding
8. Information about your organization
9. Project budget
10. Attachments

From logic model to proposal

- Need/Problem = Need Statement
- Resources = items included in the budget
- Activities = Methods
- Outputs = included in Methods
- Outcomes = included in Evaluation
- Impact = Progress toward the goal

Cover letter

The purpose is to:
- Introduce your organization
- Assure the funder that project has executive/board approval
- Present the project for funding and the amount requested
- Thank the funder for considering the request

Elements of a cover letter

- Is brief and on letterhead – 1 page, 3-4 paragraphs
- 1st paragraph
  - Acknowledges previous support/contact and introduces organization
  - Includes how much is requested and why
- 2nd & 3rd paragraphs
  - States what is included in the proposal
  - Describes project purpose
  - Shows how well request aligns with funder's requirements
- 4th paragraph
  - Summarizes importance of project
  - Follow up information
  - Invitation for site visit

Executive Summary

- A thorough overview of the proposal
- Includes keys points from <u>each</u> section
- Could be stand-alone document with enough detail and clarity to understand the contents of the proposal
- Makes reader want to know more
- Written after the proposal has been completed and before the cover letter

Needs Statement

- Taken from the original questions What? And So what?
- It purpose is to frame the problem/need that the project and this proposal addresses
- Convince the funder that the project meets a critical societal need

Elements of the needs statement

1. Nature and extent of the need/problem –
   - What is the problem & who is experiencing it
2. Factors Contributing to the problem
   - Address the causes of the problem, and needs of clients from these factors
3. Impact of the N/P
   - What impact does problem have on individual, family, community
   - What benefits can be derived if the N/P is resolved/ remediated
4. Promising Approaches for Improved Results
   - Discuss any effective theoretical/practical perspectives

Goals

- A broad statement about what you wish to accomplish
- A general intention, that is intangible, abstract & cannot be measured
- They represent ideal or "hoped for" state
- Sometimes funders may provide the goals associated with the funding
- Usually broader than the purpose of the project

Goals answer questions such as…

- What ideal conditions will exist if problem is eliminated, prevented or improved?
- What is overall, long-term condition desired for program recipients?

Objectives

- Objectives are the bridge between the goal and the activities
- Steps toward achieving the goal
- Spell out the specific benefits or outcomes for program recipients
- Are narrow, precise, tangible, concrete & can measured
- Are realistic and can be accomplished within the grant period
- Best objectives are SMART objectives (Specific, Measurable, Attainable, Realistic, and Time-Bound)
- Identify the target audience to be served

Implementation/Methods

- Describes how you will carry out the "activities" listed in the logic model to deliver the "outputs"
- Explains why these methods were selected
- Shows how activities move toward desired results (may include timeline)
- Links to resources requested in the budget
- Includes info on who is served and how they were selected

Evaluation

- Describes how "outcomes" will be measured
- Know what success looks like
- Determine if
  - Objectives were accomplished as stated
  - Funds were used appropriately

Elements of the Evaluation Section

- Describe evaluation design & what is measured
- Describe data collection – type, source, procedure, and timetable
- Provide measurement for each objective

Budget

- The backbone of the proposal
- It shows what the money will be used for
- Program activities should drive the budget
- Program narrative should match the budget

Two Types of Budgets

- Organization or operating budget
  - The board-approved annual financial statement
  - It projects fiscal year income & expenses fiscal year
- Project budget
  - Outlines resources required to carry out the program

Budget formats

There are many formats for budgets

- Expense only
- Income & Expense
- Multi-year requests
- Expense with funding request specified
- Budget narrative

Single Year Budget Expense and Income

Expense	Year 1
Salaries & Benefits	
School Counselors (3)	120,000
Curriculum Director	60,000
Mgr, Community Relations	50,000
Taxes & Benefits	19,595
Salaries & Benefits-subtotal	*249,595*
Student incentives:	
Technology Package	97,104
Renewals	-
Student incentives-subtotal	*97,104*
M&O	
Classroom supplies & materials	4,500
PR/Marketing/Printing	82,200
Rent/Equipment	50,100
M&O-subtotal	*136,800*
Total Program Expenses	**483,499**
Income	**Year 1**
State funds	75,000
ABC Foundation	40,000
XYZ Family Foundation	30,000
Bigtown Corp Foundation	70,000
Ford Foundation	100,000
Bill & Melinda Gates Foundation	100,000
Individual donors	50,000
Special event proceeds	18,500
Total Program Income	**483,500**

Multi-year Budget Income and Expense

Expense	Year 1	Year 2	Year 3	Year 4	Year 5	Total
Salaries & Benefits						
School Counselors (3)	120,000	124,450	129,000	133,800	138,750	646,000
Curriculum Director	60,000	62,225	64,500	66,900	69,375	323,000
Mgr, Community Relations	50,000	51,850	53,750	55,750	57,800	269,150
Taxes & Benefits	19,595	20,247	20,914	21,618	22,343	104,717
Salaries & Benefits-subtotal	*249,595*	*258,772*	*268,164*	*278,068*	*288,268*	*1,342,867*
Student incentives:						
Technology Package	97,104	99,288	129,360	224,448	224,448	774,648
Renewals	-	190,041	384,356	637,524	1,076,787	2,288,708
Student incentives-subtotal	*97,104*	*289,329*	*513,716*	*861,972*	*1,301,235*	*3,063,356*
M&O						
Classroom supplies & materials	4,500	4,500	5,000	5,000	5,000	24,000
PR/Marketing/Printing	82,200	82,200	82,200	82,200	82,200	411,000
Rent/Equipment	50,100	50,100	50,100	50,100	50,100	250,500
M&O-subtotal	*136,800*	*136,800*	*137,300*	*137,300*	*137,300*	*685,500*
Total Program Expenses	**483,499**	**684,901**	**919,180**	**1,277,340**	**1,726,803**	**5,091,723**

Income	Year 1	Year 2	Year 3	Year 4	Year 5	Total
State funds	75,000	75,000	75,000	75,000	75,000	375,000
ABC Foundation	40,000	40,000	40,000	50,000	150,000	320,000
XYZ Family Foundation	30,000	50,000	260,000	400,000	400,000	1,140,000
Bigtown Corp Foundation	70,000	100,000	100,000	150,000	250,000	670,000
Ford Foundation	100,000	100,000	100,000	250,000	250,000	800,000
Bill & Melinda Gates Foundation	100,000	100,000	250,000	250,000	350,000	1,050,000
Individual donors	50,000	50,000	75,000	75,000	200,000	450,000
Special event proceeds	18,500	20,000	25,000	28,000	50,000	141,500
Total Program Income	**483,500**	**535,000**	**925,000**	**1,278,000**	**1,725,000**	**4,946,500**

Sample Budget With designated use of funds

Expense		Requested ABC Fdn
Salaries & Benefits		
School Counselors (3)	$120,000	$0
Curriculum Director	$60,000	$0
Mgr, Community Relations	$50,000	$0
Taxes & Benefits	$19,595	$0
Salaries & Benefits-subtotal	*$249,595*	*$0*
Student incentives:		
Technology Package	$97,104	$40,000
Renewals	$0	$0
Student incentives-subtotal	*$97,104*	*$40,000*
M&O		
Classroom supplies & materials	$4,500	$0
PR/Marketing/Printing	$82,200	$0
Rent/Equipment	$50,100	$0
M&O-subtotal	*$136,800*	*$0*
Total Program Expenses	**$483,499**	**$40,000**

Sustainability

The purpose is to:

- Share the long-term vision and funding plan for the proposed project
- Most funders don't want to fund the project forever
- Describe a specific blueprint for raising money to continue the program

Organization Information

- The purpose is to explain what your organization is all about
- Convince funders you are capable of carrying out the project
- Should be a concise narrative
- Can be very short or up to 2-3 pages at most
- Is a simple story about your history, current programs, demographics of clients and service area
- No charts, graphs, testimonials, or details about board or staff

What To Include Org Info

- Full, legal name and status, i.e. 501c3
- Location – HQ and operating sites
- History of the agency
- Summary of programs
- Role and position in community, collaborators or partners
- Most notable achievements
- Very brief summary of the needs statement
- Financial info (overall budget & annual donations)
- Brief statement about board, staff and volunteers

Don't forget the Executive Summary!

- Summarize the request including the proposal applicant and the amount requested (2 sentences)
- Summarize the need (1-2 sentences)
- Summarize the objectives (1-2 sentences)
- Summarize the methods (1-2 sentences)
- Summarize benefits of helping solve the problem (1-2 sentences)
- Describe how the project related to funder interests (1 sentence)

Attachments

- The number of attachments/appendices vary by funder
- Some of the most common include:
  - List of Governing Board Members
  - Organization's Tax-Exempt Verification Letter
  - Most Recent Audited Financial Statement
  - Project Budget
  - Operational Budget
  - Letter of Support

ATTACHMENTS

1. Board List

2. Organization Summary

3. Organizational Budget

4. Project Budget

5. Other Funding Sources

6. List of Prior Grants

7. Financial Statements:

8. IRS Determination Letter:

Common Grant Application

Common grant application formats have been adopted by groups of grantmakers to allow grant applicants to produce a single, standardized proposal for those in a specific community of funders (usually broken down along geographic lines)

Online Applications

- Standardized format

- Usually a Q/A format

Tips for online applications

- Log in & passwords – create institutional, not personal log ins & passwords
- Prepare proposal questions in Word, then cut and paste into online application
- Save document at every opportunity
- Print and review before submitting
- Submit several days before the deadline to avoid any last minute glitches

A Good Proposal

Regardless of format…

- Uses clear, straight forward without flowery prose or jargon
- Is interesting! Uses data and human interest stories
- Is written according to the funder's guidelines

Finishing Touches

- PROOF READ, PROOF READ, PROOF READ!
- Reconfirm funders requirements, such as type font and size, page numbers, word/ page limits, margins, stapled, clipped, binding, number of copies requested, etc.
- Mail as directed by funder to arrive in advance of the deadline
- Address should be same as on cover letter

More finishing

- For online applications, keep a copy of the submission confirmation
- Make a copy of the complete application for your files (electronic or paper)
- Send copies to collaborators or links as needed
- Note when response is due and note on grant calendar

Top factors affecting Funding

- Demonstrates positive & measurable impact
- Is collaborative or partnership
- Indicates a cost effective operation
- Supports other organizations in the community
- Reflects cultural sensitivity and diversity
- Focuses on primary prevention of the problem

More factors affecting funding

- Organization has a proven track record
- Establishes new, innovative programs
- Receives funding from other sources
- Has a previous relationship with foundation
- Has a "not-too-radical" reputation
- Has competent & professionally trained staff

What If My Proposal Is Funded?

- You may get a check with a cover letter, a contract, or letter of agreement
- Write immediately to acknowledge the gift – this should include a thank you from agency head and any volunteer connector
- Sign and return any contracts
- Understand & schedule reporting requirements

What If My Proposal Is Declined?

- The letter bringing the unhappy news will probably be a form letter
- You may wish to send a "no thank you"
- If after objective review of your application and without any emotion you might call to ask if they would share anything that might help you in the future

Reporting

- Regardless of whether the funder requests a report, submit a written report no more than one year after funding
- Some funders have specific reporting deadlines and formats
- As the project unfolds and milestones are achieved, report informally to the funder
- Encourage site visits
- Good stewardship can lead to another gift

Common Questions

- Should I apply to more than one foundation at a time?
- Should I ask each one for the project's entire cost or just a portion?
- Should I use a professional grant writer?
- What happens to my proposal after it reaches the grantmaker?
- What should I do if I raise some of the money, but not all I need?

Grant writing references

- Proposal Writing, 4th ed. Soraya Coley
- Winning Grants Step by Step, Tori O'Neal-McElrath
- Grantwriting for Dummies, Beverly A. Browning
- Storytelling for Grant Seekers, Cheryle M. Clarke
- Grantsmanship: Program Planning & Proposal Writing, Norton J. Kiritz

Thank you!

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