

HOW TO WRITE SUCCESSFUL GRANT PROPOSALS

Presented by:

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Non-Profit Learning Center



Day One Review

Program Development

- Mission
- Develop Fundable Programs
- Clearly define intended outcomes
- Evaluate program success



Day One Review

Prospect Research

- Identify likely prospects:
 - Funding priorities
 - Types of support provided
 - Geographic focus
- Paid and Free Research Tools/Methods



Course Outline

- Day 1:

Program Development

Prospect Research

- **Day 2:**

Relationship Building

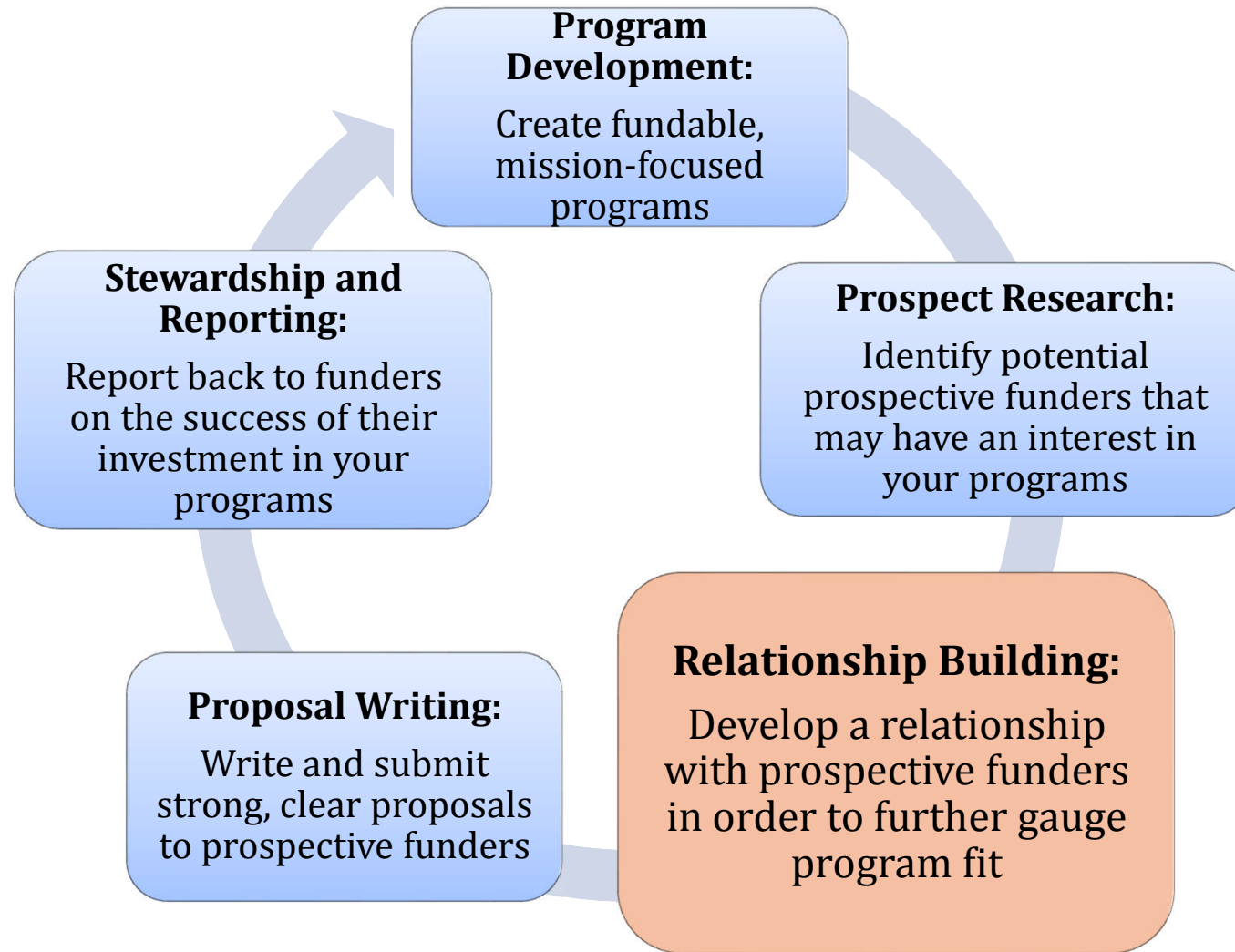
Proposal Writing

Donor Stewardship/Reporting



III. RELATIONSHIP BUILDING

Remember the Grant Cycle?





I. Relationship Building

A. Why are Relationships Important?

B. How to Establish New Grant Funder Relationships

C. How to Improve Current Grant Funder Relationships

D. Scenarios

A. Why are Relationships Important

Fundable Programs

- + Grant Research Results
- + Solid Funder Relationships

Grant revenue growth and long-term grant funder relationships



A. Why are Relationships Important

You mean Private Foundation
Funders and Corporate Funders
are people, too?



B. How to establish New Grant Funder Relationships

- Gather Relevant Research Information
- Determine the 'Communications Lead'
- Reach Out to Start Dialogue
- Keep Track of Important Dates

B. How to establish New Grant Funder Relationships

Gather Relevant Research Information

1. Funder Mission/Guidelines
2. Geographic Restrictions
3. Average Grant Size/Previous Grantees
4. Accept Unsolicited Proposals?
5. How to contact (for relationship-building and application)

B. How to establish New Grant Funder Relationships

Determine “Communications Lead”

- Strengths-based team decision
- (No consultants!)

Who is going to achieve the best result?



B. How to establish New Grant Funder Relationships

Reach Out to Start Dialogue

1. Create Talking Points
2. Base the talking points on your research
3. Talking points are useful for Face to Face, Phone, and Email

B. How to establish New Grant Funder Relationships

The Actual Outreach:

- BRIEF introduction of who you are and what your organization does (mission)
- Why YOU think that you are a strong potential funding partner
- One or two thoughtful questions that will help you produce a more competitive proposal
- Ask how/if you can follow up if you generate additional questions
- Thank funder for time and advice
- Respect input and follow their feedback very carefully!

C. How to improve Current Grant Funder Relationships

- Connect as frequently as they welcome it
- Use passive and active communication
- Use social media
- Share success stories and gratitude

C. How to improve Current Grant Funder Relationships

Connect Frequently:

How frequently?

As often as they **NEED** to see how your using their investment.

C. How to improve Current Grant Funder Relationships

Use Passive AND Active Communication

Passive:

- Newsletter/Annual report mailing lists
- Recognizing grant sources on all printed and e-material
- Following funders on their social media accounts

C. How to improve Current Grant Funder Relationships

Use Passive AND Active Communication

Active:

- Site Visits
- Special Events
- Handwritten notes or special reports (beyond what is required)
- Interact on Social Media

C. How to improve Current Grant Funder Relationships

Use Social Media

Twitter

- Follow funders
- Retweet funders
- Share resources
- Promote funders work

Facebook

- Like Funders
- Share Funder Updates
- Share success stories
- Promote funder's work

LinkedIn

- Join interest groups
- Join private funder groups
- Connect with foundation staff
- Connect with foundation board



C. How to improve Current Grant Funder Relationships

Share Success Stories and Gratitude

Offer to host a site visit

Share success stories from program participants

Drawings from youth

Handwritten thank you letters from recipients/clients

Pictures of recipients/clients

YouTube Videos



D. Scenarios

Scenario #1

- Nonprofit identified large private foundation as potential strong funding match
- Current RFP process open to application
- Nonprofit board member said they knew a member of the Foundation Board
- Organization submitted application without any contact and was denied

D. Scenarios

What could they have done?

- Staff follow-up with Foundation staff, after the board members establish the first connection
- Determine if this is the best cycle to in which to apply
- If not, internally schedule a few outreach points over the next few months:
 - Send an infographic or news article
 - Give an email update
 - Enlist the help of that board member in sharing info that demonstrates capacity of organization



D. Scenarios

Scenario #2

- Nonprofit with long history of a funding relationship with a major family foundation
- No reporting requirements from the foundation
- Nonprofit submitted formal thank you letter for each annual grant check and invited to major special event
- Funding request was denied without warning



D. Scenarios

What could they have done?

- Provide report anyway!
- Invite to site visit for funded program or at least a coffee/lunch check in
- Put onto newsletter mailing list
- Create custom thank you note from participants of funded program
- Especially if size of gift is large, do a newsy letter at least once a year

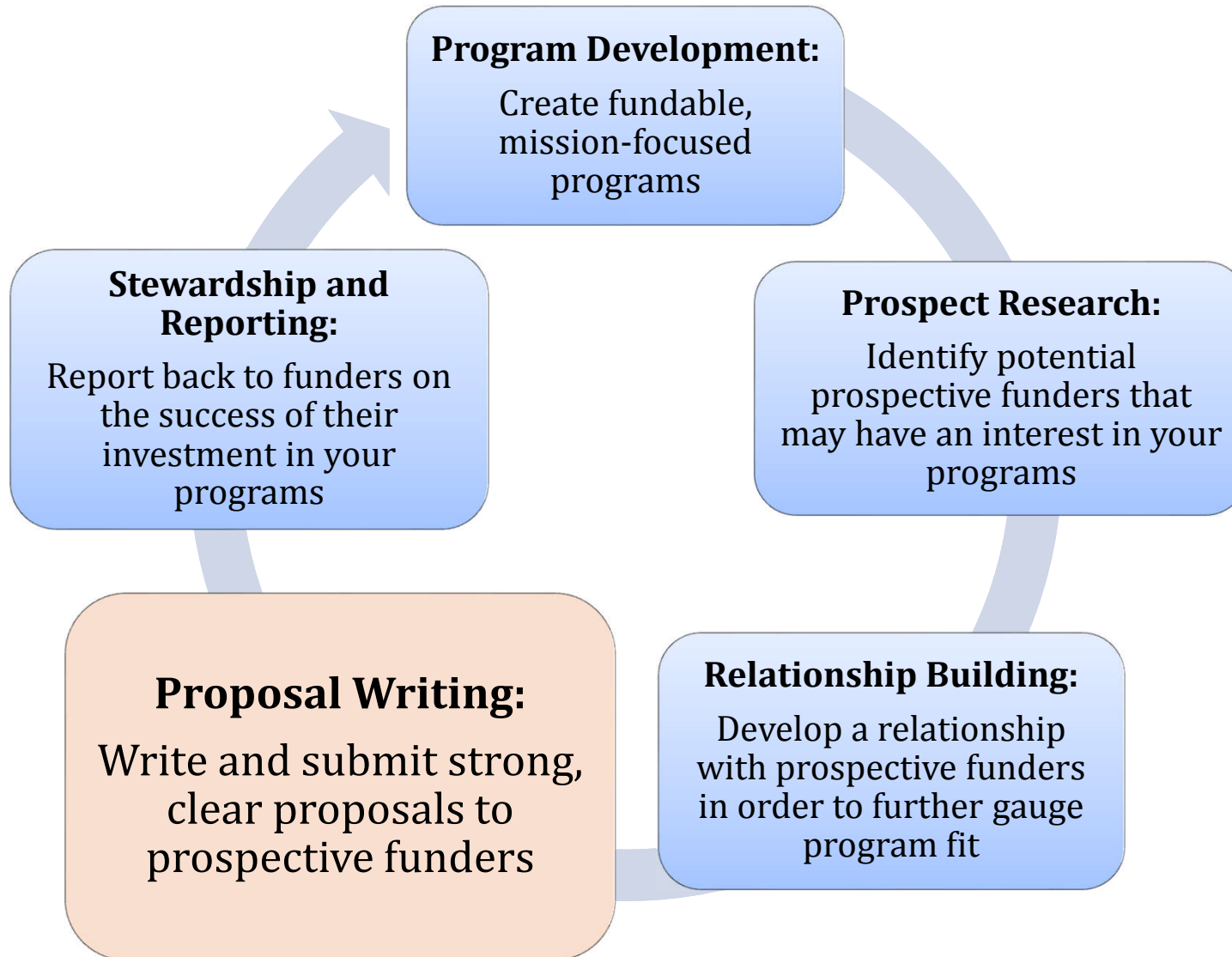


**KEEP
CALM
AND
START
WRITING**



IV. WRITING THE PROPOSAL

Finally, we made it to Proposal Writing!





IV. Writing the Proposal

- A. Culmination of all Pre-Work
- B. Common Elements of a Grant Proposal
- C. Initial Outline of Grant Proposal
- D. Creating Compelling Application Elements
- E. Being Fundable and Competitive



A. Culmination of Pre-Work

Because you systematically worked through the **grant cycle**...

What resources do you have in your **toolkit**?

A. Culmination of Pre-Work

Your Toolkit Contains:

Developed Fundable Programs

- Strong Mission/Programs
- Defined Outcomes (Strat Plan/Logic Model)
- Plan to Evaluate

Completed Funder Research

- Pool of Potential Funders
- Clear idea of funders' Mission/Guidelines

Cultivated Funder Relationships

- Funders who understand your Programs
- Funders who see your organization as a Potential Partner

B. Common Elements of a Grant Proposal

Different funders have different motivations:

- **Private Foundation** funding focuses on alignment of mission and the program outcomes
- **Corporate** funding focuses on alignment with mission/outcomes AND opportunities for good public relations
- **Federal** funding focuses on alignment to government policy

B. Common Elements of a Grant Proposal

Different funders have extremely different application requirements:

Letter of Inquiry
(1-2 Pages)



Federal Grant Proposal
(100+ Pages with detailed attachments)



B. Common Elements of a Grant Proposal

1. What Organization
2. Clear Identification of Need
3. Clear Program Description
4. SMART Goals and Objectives
5. How Success will be Measured

C. Initial Outline for a Grant Proposal

Create an outline!

- ❑ No need to be formal
- ❑ Becomes your “to do” list
- ❑ Create a check list for all the elements you’ll need for submission

Take it one step further and create a
Template Proposal!

D. Creating Compelling Application Elements

1. Cover Letter
2. Executive Summary
3. Statement of Need
4. Project Description
5. Goals and Objectives
6. Evaluation
7. Sustainability
8. Organizational Capacity
9. Budget
10. Attachments

D. Creating Compelling Application Elements

1. Cover Letter

- Request Amount
- Tailor the Message
- Reference past contact
- Components of proposal included
- Offer to answer questions/meet
- Signature from leadership

D. Creating Compelling Application Elements

2. Executive Summary

Usually includes:

- Request
- Need
- Project Description
- Outcomes
- Organizational Capacity/Expertise

(Typically a maximum of one page)

D. Creating Compelling Application Elements

3. Statement of Need

Appeal to:

- Funders Organizational Priority!

Include:

- Statistics to demonstrate need/prior success at addressing need
- Anecdotal information (quotes, cases, etc.)



D. Creating Compelling Application Elements

4. Project Description

- Clear, detailed description of Method (Activities and Timelines)
- Organizational Capacity/Staffing

D. Creating Compelling Application Elements

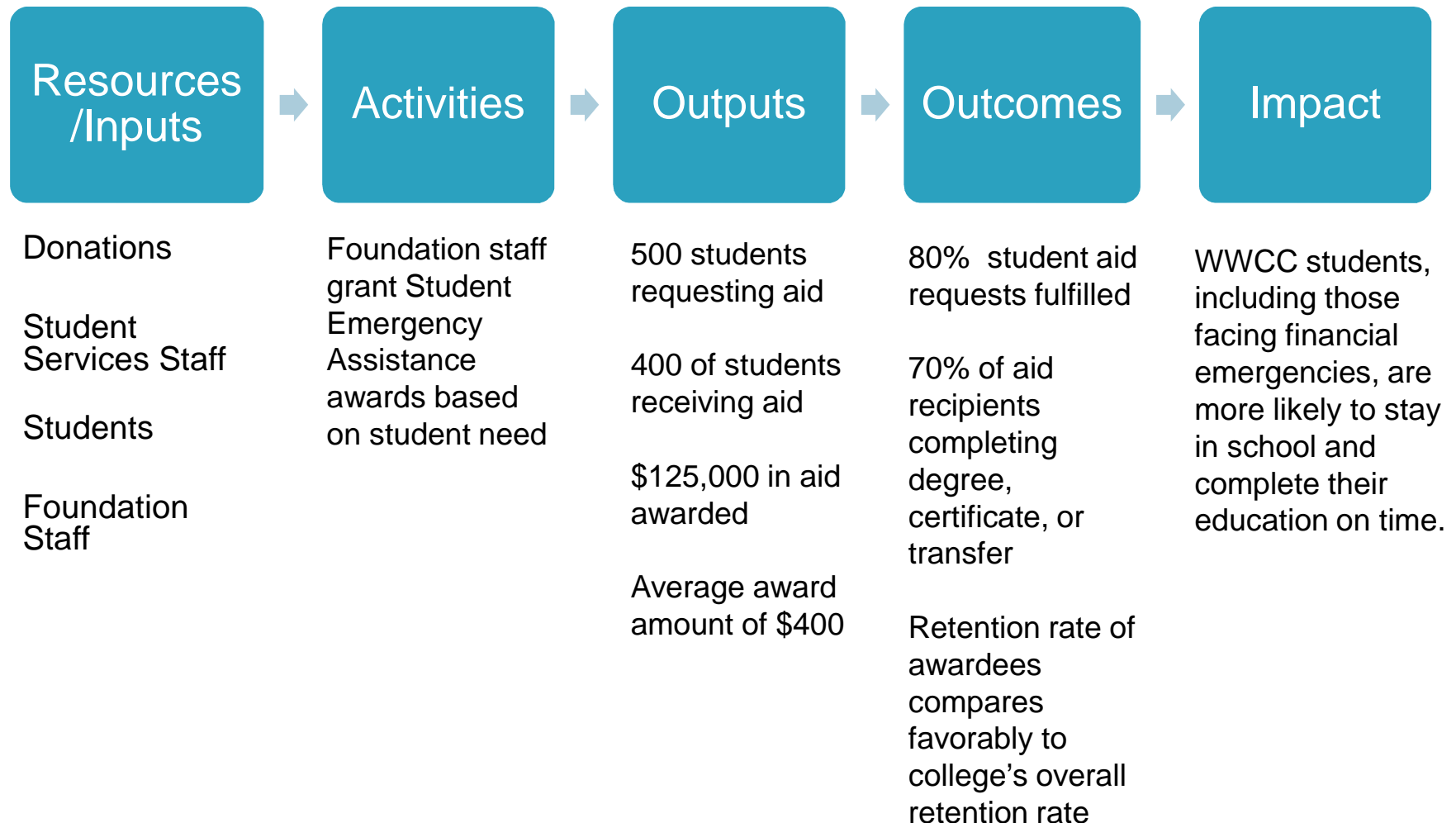
5. Goals and Objectives

- Clear, detailed description of your intended OUTCOMES (use Logic Models if possible)

Use funder's own words to show alignment.

Remember?

WWCC Logic Model for Student Emergency Assistance



D. Creating Compelling Application Elements

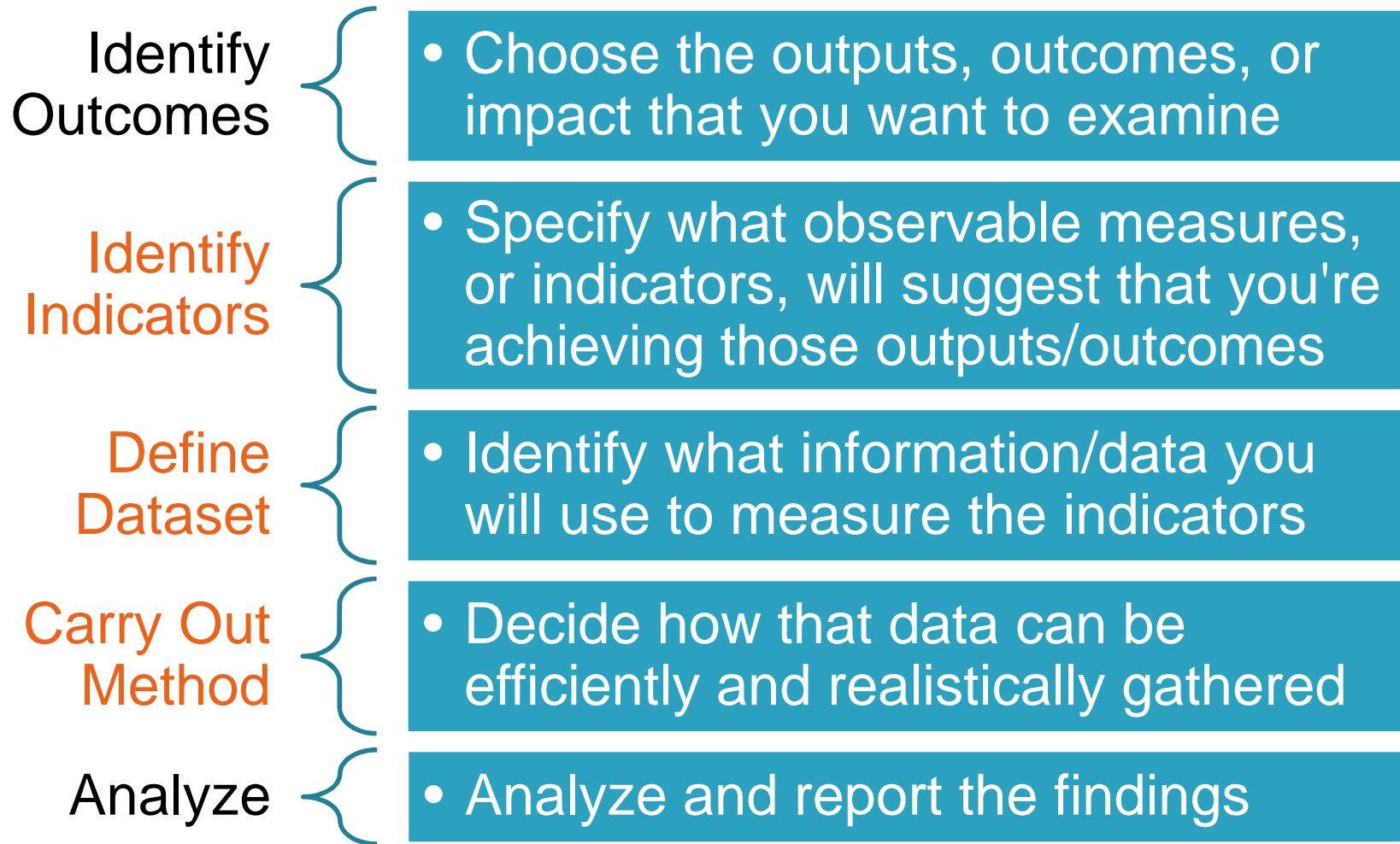
6. Evaluation

Defines in narrative form:

- What does success look like?
- How will goals and objectives be measured?
- If goals and objectives are not being met, what corrective action will take place?
- What will be done with the evaluation information?

Remember?

Evaluation Chart from Yesterday



D. Creating Compelling Application Elements

7. Sustainability

- This is where you answer the dreaded question:

How will the program continue beyond this funder's grant support?

- Continuous grant-seeking isn't usually considered a long-term solution



D. Creating Compelling Application Elements

8. Organizational Capacity

- Date of founding (particularly if you've been around for a long time)
- History/Success of providing similar programs
- Information on staff and board
- Certifications, Qualifications, Accreditations, etc.

D. Creating Compelling Application Elements

9. Budget

Income Information Including:

- Earned Income

- Grants and Gifts

Expense Information Including:

- Program Costs

- Personnel

- Overhead

D. Creating Compelling Application Elements

9. Budget

	2010 Organization Budget	Total Program Budget	Request
Revenues			
Individual Contributions	100,000		
Special Events	40,000		
Corporate Contributions	240,000	237,500	
Foundation Contributions	200,000	157,500	10,000
Government Contributions	15,000		
Earned Income	74,025	74,025	
Interest Income	2,400		
Total Revenues	671,425	469,025	10,000
Expenses			
Technology	27,707	24,082	2,500
Supplies and Materials	80,403	55,793	2,500
Communications	8,160	8,160	
Occupancy	32,305	32,305	
Conferences/Events	18,300	875	
Outreach	69,743	48,815	
Staff	407,246	277,111	5,000
Professional Fees	33,118	21,618	
Total Expenses	676,982	468,759	10,000
Net Surplus/(Deficit)	(5,557)	266	-

D. Creating Compelling Application Elements

10. Attachments

- 501c3 Determination Letter
- Organization's 990
- Financial Statements for the last fiscal year
- Current Year Org Budget
- Audit Report (if available)
- Board of Directors Roster
- Staff Roster
- Specific Program Reports
- Annual Report
- Client Testimonials
- Program Photos



E. Being Fundable and Competitive

How to ensure you are Fundable:

E. Being Fundable and Competitive

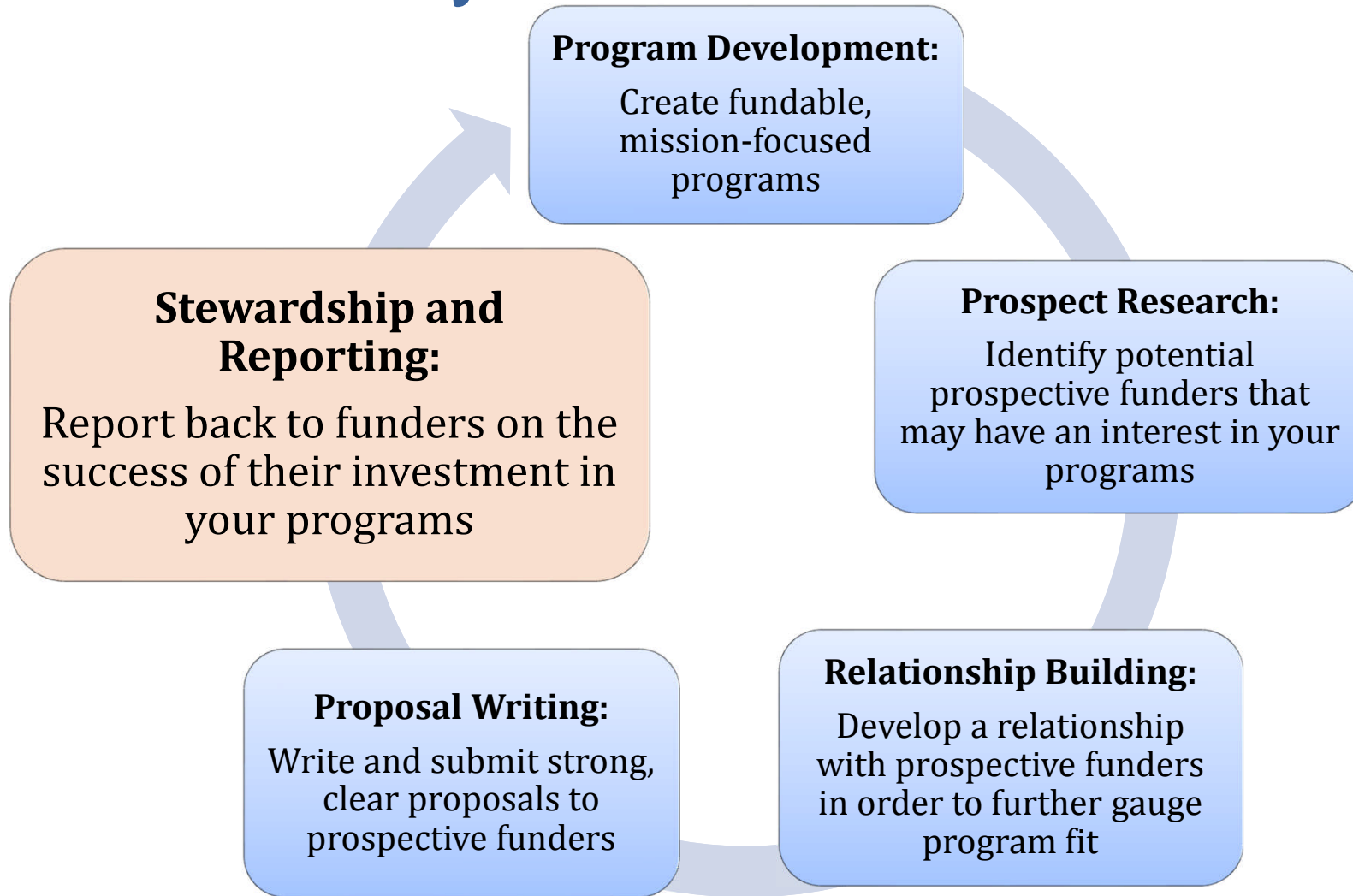
How to give your proposal the best chance at a positive review:

- Discuss proposal with funder prior to application when possible
- Meet all eligibility requirements
- Meet all application formatting requirements
- Meet ALL deadlines



V. REPORTING AND STEWARDSHIP

The Grant Cycle





V. Reporting and Stewardship

A. Thank Immediately

B. Integrate Funder into Stewardship Calendar

C. Recognize Gift (if appropriate)

D. Report

E. What if... Your Proposal Isn't Funded?



A. Thank Immediately

Don't be afraid to be profuse and creative with your Thank Yous:

- Regular Tax Receipt Letter
- Thank You from Primary Contact Person
- Thank You from Board Member
- Thank You(s) from Program Participants
- Art Work or Video



B. Integrate Funders into Stewardship Calendar

The Golden Rule of Grants Stewardship:

Do unto your Foundation and Corporate Donors as you would do for individual donors!

C. Recognize Gift

Brainstorm ways to publicly recognize your donors:

Especially important for CORPORATE donors!

- List on/in Website, Newsletter, Annual Fund
- Include on Donor Recognition at your location
- Recognize on Signage at Programs
- Include in Fundraising or other Public Events
- Shout Out on Social Media

D. Reports

Excellent Program Reports...

Assure donors that their investment was a success!

- Don't be afraid to go into detail
- Describe your program as it actually looked in practice
- Include detailed evaluation results about your Outcomes
- Address any problems encountered and how you solved them
- Paint the picture, share participant stories
- Never miss the deadline!

E. What to do if your proposal isn't funded?

- Thank anyway
- Ask if they'll give feedback
- Ask for reviewer's comments
- Look at the proposal again and carefully consider improvements
- Reconvene your proposal team

FINAL TIPS

Things to Remember about Reviewers:

- Your reviewer knows virtually nothing about your organization or programs
- Your reviewer is looking at possibly hundreds of proposals
- Your reviewer will likely skim (and that's okay)
- Acronyms are sure to confuse your reviewer
- Deviations from required format will likely frustrate your reviewer

FINAL TIPS

Reasons a proposal may be denied:

- The program doesn't meet the funder's mission priorities
- The program is not located in the geographic area of funding
- The proposal does not follow the required format
- The proposal is poorly written, disorganized, or difficult to understand
- There is insufficient evidence that the program will continue after the grant is completed



Questions?

- **Day 1:**

Program Development
Prospect Research

- **Day 2:**

Relationship Building
Proposal Writing
Donor Stewardship/Reporting





