HOW TO WRITE SUCCESSFUL GRANT PROPOSALS

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INTRODUCTIONS

• Your Name and Organization
• Your Role
• How many Fundraising Staff?
KEEP CALM AND START WRITING
The Grant Cycle

**Program Development:**
Create fundable, mission-focused programs

**Prospect Research:**
Identify potential prospective funders that may have an interest in your programs

**Proposal Writing:**
Write and submit strong, clear proposals to prospective funders

**Stewardship and Reporting:**
Report back to funders on the success of their investment in your programs

**Relationship Building:**
Develop a relationship with prospective funders in order to further gauge program fit
Course Outline

• Day 1:
  Program Development
  Prospect Research

• Day 2:
  Relationship Building
  Proposal Writing
  Donor Stewardship/Reporting
I. PROGRAM DEVELOPMENT
Remember the Grant Cycle?

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I. Program Development

A. Passionately pursue your mission

B. Consider funding likelihood while developing programs

C. Clearly define intended outcomes
   i. Strategic Planning
   ii. Logic Models

D. Evaluate program success
A. Passionately Pursue Your Mission

Don’t ‘Chase the Money’

…Avoid Mission Creep!
A. Passionately Pursue Your Mission

Organizations that creep:

- Risk damaging reputation
- Put added strain on staff
- May lose their organizational identity
A. Passionately Pursue Your Mission

Organizations that don’t creep:

• Have a clear mission, with clear outcomes
• Filter decision-making through that mission
• Are sensitive to organizational capacity and staff bandwidth
• Have and follow a strategic plan; use mission and strategic plan as course-setting tools
I. Program Development

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B. Create Fundable Programs

Programs are more likely to be funded if:

1. Your project addresses a societal need
2. Your work is novel
3. You have clearly defined outcomes
B. Create Fundable Programs

Programs are more likely to be funded if:

4. Your project budget is reasonable

5. Work will continue after the grant has ended

6. Your work is collaborative

7. Invested in the project
I. Program Development

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D. Evaluate program success
C. Clearly Define Intended Outcomes

Two critical tools:

i. Strategic Planning

ii. Logic Models
i. Strategic Planning

A process by which the guiding members of an organization envision its future outcomes and develop the necessary procedures and operations to achieve that future.

-- Susan Newton, Development Strategies Plus
i. Strategic Planning

It is a composite, a blueprint that answers three questions facing any organization:

• What will we do and for whom will we do it (e.g., programs, services or products)?
• What objectives do we want to achieve (e.g., to fulfill our mission)?
• How will we manage the organization's activities to achieve the chosen objectives (e.g., people, money, expertise, facilities)?
i. Strategic Planning

The elements of a quality planning process are:

- Updated mission and vision statements
- Definition of the organization’s strategic direction with detailed objectives, strategies and tactics
- A detailed work plan to achieve objectives
- Data regarding upcoming demographic, political, organizational, and funding trends
- Data from internal and external assessment
i. Strategic Planning

Most basic elements of a strategic plan
A. Update (or create) mission statement.
B. Select the organization’s immediate, intermediate, and long term goals.
C. Identify approaches or strategies to reach each goal.
D. Identify action plans to implement each strategy.
ii. Logic Models

Logic Models...

• provide a picture of how your organization does its work

• link outcomes (both short- and long-term) with program activities/processes
ii. Logic Models

Logic models show how your organization uses resources to create impact.
ii. Logic Models

Resources/Inputs: Resources include the human, financial, organizational, and community resources a program has available to direct toward doing the work.
ii. Logic Models

Activities:

Program Activities are what the program does with the resources. Activities are the processes, tools, events, technology, and actions that are an intentional part of the program implementation.
ii. Logic Models

Outputs:

Outputs are the direct, ‘countable’ products of program activities. May include number of constituents served, programs delivered, geographic areas served, etc.
ii. Logic Models

Outcomes:

Outcomes are the specific changes in program effectiveness or program participants’ behavior, knowledge, skills, status and level of functioning. Examples include % of participants who show an increased skill or improved behavior.
ii. Logic Models

Impact:

Impact is the fundamental change occurring in organizations, communities or systems as a result of program activities.
ii. WWCC: Logic Model for Student Emergency Assistance

**Resources / Inputs**
- Donations
- Student Services Staff
- Students
- Foundation Staff

**Activities**
- Foundation staff grant Student Emergency Assistance awards based on student need

**Outputs**
- \# of students requesting aid
- \# of students receiving aid
- Total $ amount of aid awarded
- Average $ amount of aid awarded

**Outcomes**
- \% student aid requests fulfilled
- \% of aid recipients completing degree, certificate, or transfer
- Retention rate of awardees compares favorably to college’s overall retention rate

**Impact**
- WWCC students, including those facing financial emergencies, are more likely to stay in school and complete their education on time.
I. Program Development

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High-performing organizations seek and use data and feedback (evaluation) to continually assess and improve their work.
D. Evaluate program success

Why evaluate?

Accountability

• Prove your organization is **worthy of the public trust** and the dollars given to support your programs
• Show various contributors that their **social investment is working**
• Ensure that the people for whom the organization exists are receiving **tangible, real benefits**
• Better understand the delivery of programs: **Refine and do a better job**
D. Evaluate program success

Identify Outcomes
• Choose the outputs, outcomes, or impact that you want to examine

Identify Indicators
• Specify what observable measures, or indicators, will suggest that you're achieving those outputs/outcomes

Define Dataset
• Identify what information/data you can use to measure the indicators

Carry Out Method
• Decide how that data can be efficiently and realistically gathered

Analyze
• Analyze and report the findings
D. Evaluate program success

Inexpensive evaluation ideas

Quantitative Data:
• Perform pre-/post- surveys with program participants and stakeholders (parents, teachers, employers)
• Collect available public data (census, county, school district)
• Work in partnership with local government or public agencies to access specific data on your participants (i.e. school grades)

Qualitative Data:
• Focus groups
• Interviews
• Written narrative feedback
II. PROSPECT RESEARCH
Next up in the Grant Cycle:

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II. Prospect Research

A. Why Research?
B. What to look for when Researching
C. Paid options for Grant Research
D. Free options for Grant Research
A. Why Research?

Through research.

You will develop a pool of potential funders that want to support your program outcomes.
B. What you learn through Research

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)
1. Mission/Funding Guidelines

Look for....

- Alignment with your organization's mission/programs
- Language they use to describe THEIR mission
2. Geographic Restrictions

Look for…

- Scope of geographic focus
  (city, county, region, state, national, other designation?)
3. Average Grant Size/Previous Grantees

Look for….
- Size and range of grant awards ($10K, $100K, more?)
- Total asset size and number of awards annually
- Types of organization receiving awards

How do they actually work to achieve their mission?
4. Do they accept unsolicited proposals?

There is a check box on the 990 private foundations must submit annually:

Part XV on IRS 990-PF

Most research tools allow you to exclude those that don’t allow unsolicited proposals.
5. How to contact?

Look for...

- Instructions on how, why, and when they want to be contacted
- Respect their process
C. Paid options for Grant Research

![Foundation Directory Online logo](logo1.png)

![GrantStation logo](logo2.png)

![Foundation Search logo](logo3.png)
C. Paid options for Grant Research

1. Pros and Cons

Pros:
Much easier to search
Search by interest area/geography
Sorting and targeted search helps narrow focus

Cons:
Resource intensive (cost, staff time)
C. Paid options for Grant Research

2. How to Use

• Utilize free demos or trials

• Partnerships with libraries/universities

• Professional association discounts

• One month at highest subscription level
C. Paid options for Grant Research
C. Paid options for Grant Research

3. Paid Services
   • Foundation Center’s ‘Foundation Directory Online’
   • FoundationSearch
   • GrantStation
   • COS Pivot
   • GrantSelect
   • GrantForward
   • eCivis
   • EfficientGov
   • Regional grantmaker associations/council of foundations
   • Industry specific publications
D. Free Options for Grant Research

1. Pros and Cons
2. Options
   - Funder Website
   - Funder Social Media
   - 990s
D. Free Options for Grant Research

1. Pros and Cons

Pros:
Cost!

Cons:
Wide variety of information; Un-standardized
Staff time to sort through and consider research
Harder to search by topic
D. Free Options for Grant Research

2. Options: Funder Websites
D. Free Options for Grant Research

2. Options: Funder Websites

Pay attention to:

• How do they describe their own work and goals for funding

• Carefully follow all directions about How to Approach and How to Apply

• Read FAQ!

• Use what you learn to make decision about applying
D. Free Options for Grant Research

2. Options: Social Media
D. Free Options for Grant Research

2. Options: Social Media

Pay attention to:

- What the funder is sharing, what they are linking
- Success stories about their own work
- Events and Funding opportunities
- “Invite only” funder groups (LinkedIn)
D. Free Options for Grant Research

2. Options: 990s
D. Free Options for Grant Research

2. Options: 990s

Most important things to learn from a 990:

- Asset Size (Page 1, Letter I)

- Unsolicited Proposals Accepted? (Part VX checkbox)

- Current Grantee List (Usually attached toward the end)
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
Topics for Day Two

Relationship Building
Proposal Writing
Donor Stewardship/Reporting
A Quick Note:

Practice Proactive Grantseeking…
Don’t ‘Chase the Money!’
Proactive Grantseeking (D.H. Leonard Consulting)

First…

- Identify your organization’s mission (hopefully you’ve already done this!)
- Develop strong, fundable programs that address that mission
- Create reasonable, realistic budgets for those programs
- Seek appropriate funding sources to support the programs you plan to offer

THEN write the proposal
BTW:

‘Reactive’ grant seeking still has a critical place within a proactive grant strategy.