

GUIDE TO GOOD
GRANTSMANSHIP:

*WINNING
PROPOSALS*

The Grant Seeking Continuum

- Research
- Planning
- Relationship building
- Enquiries
- Grant writing
- Site visits
- Reports
- Evaluation
- Acknowledgement and recognition

Getting Ready

- Understanding the grant cycle and application process
- Motivation
- Organizational readiness
- Research
- Planning

A spiral-bound notebook with a light beige, textured cover. The metal spiral binding is visible on the left side. The text is centered on the page.

“There is always money; only the
pockets change.”

-Gertrude Stein

Sources of Funding Support

- Private Foundations
- Public Foundations
- Business
- Government
- Service Clubs
- Employee Organizations
- Individual Donors
- other

Sources of Information

- Internet
- Library
- Previous supporters
- Newspapers, periodicals
- Funders
- Word-of-mouth
- other

Research Filters

- Organization
- Subject area
- Geographic area
- Type and amount of funding
- Timing
- other

Funders are looking for:

- The “fit”
- Credibility
- Capability
- Feasibility
- Importance
- other

Foundation giving programs seek:

- Consistency with organizational mission; to follow donors' wishes
- Opportunity to make a difference
- Opportunity to make a point
- Opportunity to build organizational and community capacity
- Results, sustainability, accountability, replicability

Grant Components, Cycles, and Relationships

- Develop systems
- Coordinate
- Integrate
- Micro/macro focus
- Individual/organizational
- Follow-through

Building Relationships

- One size does NOT fit all
- Request a meeting
- Respect peoples' time
- Respect their rules
- Follow their lead
- Network
- Maintain the relationship

Funders' Questions:

- Who are you?
- What do you want?
- Why do you want it?
- How will you use it?
- When do you need it?
- other

Answers: Basic Components

- introduction to organization
- project summary
- problem or needs statement
- goals and objectives
- methods/strategies/workplan
- on-going or future plans
- budget
- evaluation plan

Proposal Formats

- Letter of inquiry/letter of intent
- Cover letter
- Application form
- List of required information
- Print
- Electronic

Letter of Inquiry/Letter of Intent

- Introduction to organization/general background
- Problem or needs statement
- Project description: goals, objectives, strategies
- Budget
- Evaluation plan
- Other important relevant information
- Conclusion/follow-up plans

Grant Proposal Basic Components

- Project/Executive Summary
- Introduction to organization/general background
- Problem or needs statement
- Project/program description: goals, objectives
- Methods/strategies/activities or workplan
- Evaluation/dissemination plan
- On-going or future plans
- Budget

Organization Information

- Contact details
- Organization leadership
- History, mission, mandate
- Organization/project expertise
- What makes the organization unique?
- Project partners, if applicable

Problem, Needs or Opportunity Statement

- The “why” of the proposal
- Must be compelling
- Includes facts and data
- May reference research, needs assessments, previous projects
- Include examples, stories, quotes

“No numbers without stories; no stories without numbers.”

Project Description

- Goal(s)
- S.M.A.R.T. Objectives
- Strategies
- Activities
- Workplan
- Schedule
- Logic frame

“SMART” Approach

- Specific
- Measurable
- Achievable
- Relevant/Realistic
- Timely

Evaluation

- What are the key questions?
- How will success be measured?
- How will data be collected?
- Ethical considerations? Budget? Capacity?
- Formative/summative
- Qualitative/quantitative

“No numbers without stories; no stories without numbers.”

Budget

- Flows from workplan
- Includes revenues and expenses:
anticipated, confirmed, in-kind
- Appropriate categories and explanations
- Must be detailed, realistic, accurate
- Include budget narrative where possible

Refining the Proposal

- Clear
- Concise
- Complete
- Compelling
- Accurate

Avoid:

- assumptions
- jargon
- begging
- repetition
- overkill
- extravagant packaging

Clarity

- Plain language
- Good grammar, style, unity and coherence
- Active voice, consistent tense
- Logical order
- Effective lay-out, presentation
- Avoids jargon, repetition, difficult vocabulary

Compelling: Passion and Vision

- Bold, descriptive, action-oriented
- Honest, sincere; factual, realistic
- Inspiring, illuminating, motivating
- Examples, stories, quotes, data
- Balances intellectual and emotional appeal

Completeness

- Cover letter
- Proposal/application
- Attachments:
 - financial statements
 - board of directors listing
 - annual report, newsletters
 - support letters
 - other

Four Types of Proposals

- Good idea, good proposal
- Good idea, bad proposal
- Bad idea, good proposal
- Bad idea, bad proposal

- *Joel Orosz, Grantmaking Basics*

Evaluating Grants

- Screening for eligibility
- Organization strength
- People
- Financial condition
- Issue or problem to be addressed
- Program objectives
- Methods
- Evaluation
- Future/other funding
- Language and form

Common Mistakes

- Incomplete information
- Insufficient information
- Lack of clarity
- Unjustified budget expenditures
- Lack of passion and/or vision
- Unsubstantiated need
- Asking for the wrong amount

Common Problems

- Duplication of existing project
- Lack of expertise in key areas
- Poorly conceived idea, too vague
- Lack of long term capacity to sustain
- Key people not consulted

Common Problems

- no connection to target group
- poor track record; accountability, credibility issues
- poor timing
- wrong strategy to address issue
- questionable impact

Eight Qualities Of Exemplary Proposals

- Energy
- Expertise
- Commitment
- Clarity
- Collaboration
- Benefits
- Comprehensiveness
- Effectiveness

Top 10 Tips

- Reach the heart and the head
- Be bold and clear, not tenuous
- Demonstrate organizational capacity/credibility
- “frame” for the funder
- Be responsive and proactive, but not aggressive
- Involve the right people/organizations
- Follow instructions
- Include the right attachments
- Proof read
- Have outsiders read

Site Visit Sample Agenda

- Introductions
- Review agenda; establish timelines
- Tour facility
- Brief presentation of proposal by applicants
- Discussion; questions and answers
- Review and approval process
- Timing; next steps

If your request is declined....

- Don't take it personally
- Understand why
- Find out if you apply again
- Look for other funders, if appropriate
- Maintain relationship, where appropriate

Partial success....

- Reduced amount of funding
- Conditional funding
- Delayed funding

If you receive a grant....

- Thank-you
- Follow instructions
- Fulfill any requirements for terms and conditions, press release, etc.
- Submit required reports, evaluation, financials, receipts
- Maintain communication and relationship
- Funder acknowledgement and recognition

Grant Reports

- Clear, concise, complete, compelling, accurate:
 - Bold, descriptive, action-oriented
 - Honest, sincere; factual, realistic
 - Inspiring, illuminating, motivating
 - Examples, stories, quotes, data, photos
 - Balances intellectual and emotional appeal
 - Opportunities for site visits