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
“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