

SUCCESSFUL GRANTWRITING: STEPS AND STRATEGIES

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OUTLINE OF REMARKS



presented by:

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I. PLANNING AND PREPARATION



- A. Long Range Strategic Plan
- B. Community or Client Needs Assessments
- C. Team Envisioning (staff, volunteers, beneficiaries)
- D. “Packaging” Your Budget
- E. Wish Lists
- F. Collaboration

II. RESEARCH

- A. Potential Funding Resources
 - 1. foundations (private, family, operating, community)
 - 2. corporate
 - 3. government
 - 4. public charities
- B. Where to look for information:
 - www.doj.nh.gov > Charitable Organizations in NH
 - Others: fdncenter.org; guidestar.org (for 990 PF);
 - GrantSmart.org; mgic.org; agmconnect.org
- C. What to look for
- D. “Yenta” – Making the Match
- E. How to Proceed

III. PRINCIPALS OF EFFECTIVE PROPOSAL WRITING

1. **Do exactly what the funder tells you to do.**
2. **The Proposal should be neat, clean and easy to read.**
 - a. No typographical or grammatical errors
 - b. Send the original, and copies as requested
 - c. Break up the copy with short paragraphs, indentation, underscoring, bullets, plenty of white space
 - d. Avoid excess window-dressing.
3. **Communicate in plain English**

"In writing, clarity is everything." -- Confucius

 - a. No agency lingo (that especially includes all acronyms)
 - b. If you must use jargon, define your terms
 - c. Avoid "globalese."
 - d. Talk to the reader.
 - e. Give it to Grandma: conduct an external review.
4. **Brevity is Best.**
 - a. Long enough to clearly communicate your message. No more, no less.
5. **Be Positive.**
 - a. Write in the right frame of mind.
 - b. You are an applicant, not a supplicant.
6. **Be honest and accurate.**
 - a. Eschew over-statement.
 - b. Don't disguise operating support as project funding.
 - c. Clarify requests if asking for support for existing programs.
7. **Avoid unsupported assumptions.**
 - a. Write as though to a Martian (don't assume they know you.)
 - b. Document the local scope of the problem.
 - c. Demonstrate cause and effect.

IV. ELEMENTS OF AN EFFECTIVE PROPOSAL

1. **SUMMARY:** Provides a succinct overview of the request

- 1. appears at the beginning of the proposal
- 2. identifies the applicant agency
- 3. reinforces credibility
- 4. summarizes the problem
- 5. defines the goals and objectives
- 6. states the total costs, funds already available for the project/program, and the amount requested
- 7. is brief, clear and interesting

2. **INTRODUCTION:** Establishes the agency's qualifications and credibility

- 1. clearly identifies the agency
- 2. states the agency's purposes and goals
- 3. describes the agency's programs and activities
- 4. defines the agency's clients or constituents
- 5. documents achievements, effectiveness
- 6. demonstrates qualifications in project/program area
- 7. leads to the problem to be addressed
- 8. is interesting and as brief as possible
- 9. is jargon-free

3. **PROBLEM OR NEED STATEMENT** Documents the needs to be met, or the problem to be solved by the proposed funding

- 1. IS STATED IN TERMS OF CLIENTS' NEEDS
- 2. relates to the mission and goals of the agency
- 3. is supported by statistical evidence
- 4. is validated by authorities
- 5. makes no unsubstantiated assumptions
- 6. makes a compelling case
- 7. is jargon-free, interesting, and as concise as possible

4. **PROGRAM OBJECTIVES:** Defines the benefits of the funding in measurable terms

- 1. establishes and defines objectives as outcomes
- 2. clearly distinguishes objectives from methods
- 3. includes an objective for each problem or need
- 4. describes the population that will benefit
- 5. defines the time by which objectives will be met
- 6. establishes measurable objectives, if possible

5. **METHODS:** Presents a sound plan for achieving the project objectives and desired results

- 1. flows from the problem and objectives
- 2. clearly describes the program activities
- 3. presents a reasonable scope of activity
- 4. states the reason for selected activities
- 5. states the sequence of activities
- 6. describes the project staffing
- 7. defines clients affected by the program

Personnel: As part of the Methodology, defines the roles, level of involvement, and qualifications of all key people participating in the project.

6. **EVALUATION:** Creates a plan to determine the degree to which the objectives have been met

- 1. offers a plan for evaluating the achievement of the objectives
- 2. presents a plan to monitor and modify methods during the project
- 3. identifies who will be responsible for the evaluation
- 4. clearly states the criteria for success
- 5. describes how data will be collected
- 6. explains any evaluation devices that will be used
- 7. plans for any reports

7. **BUDGET:** Clearly delineates all expenses of the project
- 1. reflects all elements of the proposal narrative
 - 2. is sufficiently detailed
 - 3. projects any possible changes in costs
 - 4. explains all miscellaneous or contingency amounts
 - 5. shows all elements to be funded by grant source and others
 - 6. separately details personnel and non-personnel costs
 - 7. includes fringe benefits, indirect and other expenses
 - 8. is sufficient to carry out project activities
8. **FUTURE (or other) FUNDING:** Describes a realistic plan for additional and/or continuing funding for the project
- 1. relies minimally on future grant support
 - 2. describes how the program will be sustained
 - 3. describes a specific plan to secure continuing funding
 - 4. includes letters of other commitments, if applicable
9. **ADDENDA:** Includes additional relevant materials that will support the case for the request, and other materials required by the funder (ie, IRS letter, audited financial statement, Board list, etc.)
10. **THE COVER LETTER:** Captures the “personality” of the agency and reinforces the case for support
- 1. is signed by an appropriate organizational authority (Board Chair, President & CEO)
 - 2. assures Board endorsement
 - 3. very briefly outlines the proposal
 - 4. incorporates the request into context of the agency
 - 5. establishes follow-up opportunities
 - 6. does not patronize, intimidate, or beg
 - 7. is addressed to a specific, appropriate person

V. REFINING YOUR PROPOSAL

VI. STEWARDSHIP

Other Potential Concerns of Funding Sources:

1. What is the significance of your project, not only to your organization but to the community in general?
2. Are the goals and time frames realistic?
3. In what ways is your organization committed to the project?
4. Does the project fall within the funder's interest and geographical area?
5. Does the project duplicate existing programs or services?
6. Who will oversee grant expenditures and what are their qualifications?
7. How would you characterize your organization's management capabilities? What is the make-up of your board and other supporters?
8. How does the project justify the cost?
9. How can their funding provide leverage for other funders?
10. Can the project be used as a model for duplication elsewhere?
11. What kind of track record does your organization have in terms of receiving foundation grants?
12. In what ways is the proposed project a good investment for the foundation?
13. What happens to the project after the foundation's funding ends?

ALL-TOO-TYPICAL ORGANIZATION BUDGET

EXPENSES

Salaries	\$ 84,000
Fringe & Benefits	9,050
Rent	7,200
Utilities	4,100
Telephone	2,200
Insurance	2,350
Equipment & Maintenance (PC)	4,000
Consumable Supplies	1,500
Postage	800
Printing	2,400
Contract Services	1,200
Travel	500
Professional Development	<u>500</u>
	\$119,800

INCOME

Health and Human Services United Way	\$ 34,000
	19,000
Town Funding	17,000
Client Fees	13,000
Grants	8,000
Contributions	4,000
Special Event/Annual Bake Sale	3,200
	\$ 98,200
Surplus/Deficit	(21,600)

ORGANIZATIONAL PROGRAM BUDGET

EXPENSES

Administration		
Salaries (Ex Director, Admin Ass't)		46,000
Fringe & Benefits		4,800
Rent		6,000
Utilities		4,100
Telephone		960
Insurance		2,350
Professional Development		125
Travel		100
Consumable Supplies		500
Stationery/Office Supplies		
Postage		500
Printing		
Informational Brochure		1,300
Victim Advocacy Program		
Salaries/Fringe (Counselors, Advocates)		42,250
Telephone		1,240
Emergency Housing/Medical		1,200
Assault Prevention/Procedure Guide		800
Professional Training		375
Consumable Supplies (clothing, toiletries, etc)		1,000
Resource Data Bank		4,000
Transportation		100
Children's Abuse Awareness Program		
Contract Services		1,200
Puppets		500
Curriculum Guide		300
Postage		300
Travel		300