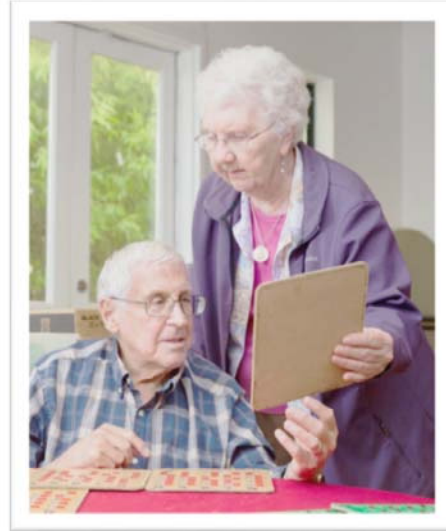




Exploring Grantsmanship

CBSS Webinar

May 24th, 2018





A few questions...

How many have written a grant application before?

How many have written more than one grant application?

How many have written a grant application that resulted in an approved grant?



This morning's webinar is a basic introduction to grantsmanship – intended for beginners, or those who are looking for a quick refresher on the topic.

Grantsmanship

...is much more than
completing an
application form
or writing a proposal



Although we usually talk about Grant and Proposal Writing, I always prefer to talk about grantseeking or grantsmanship, because a successful proposal is much more than just filling out an application form.



The Grant Seeking Continuum

Keeping track

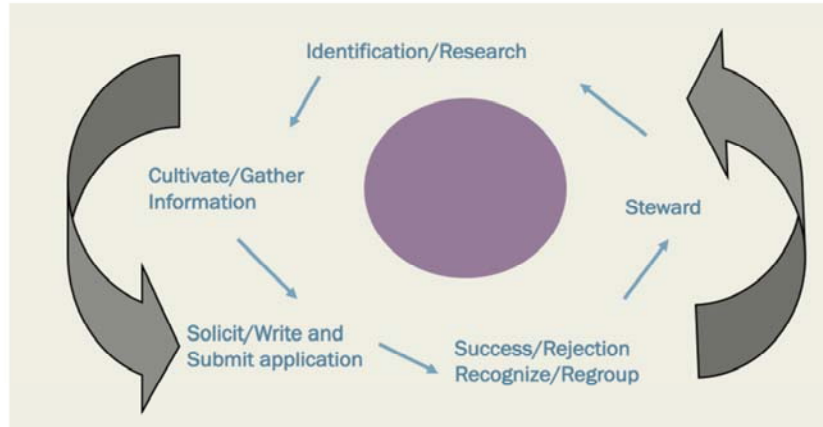
- Research
- Planning
- Relationship building
- Enquiries
- Grant writing
- Site visits
- Reports
- Evaluation
- Acknowledgement and recognition

Rather, effective grantsmanship is a cycle or continuum of research, planning, relationship building and more - and it doesn't necessarily occur in a linear fashion. You may be dealing with different activities and funders simultaneously, or over a long period. It should be a holistic approach that is integrated into the organization.

And at every step, it includes keeping track!



Grant Cycle Components



Or put another way, it's a process of research, cultivation, proposal development and submission, success – or not – and stewardship.



Getting Ready

- Understanding context and current environment
- Understanding the grant cycle and application process
- Organizational readiness
- Research
- Planning
- Developing systems and templates

Like many things, good planning and preparation will increase your chances of success.

Given the external context - in particular, more competition for fewer dollars, coupled with an increased emphasis on impact and accountability - organizations need to pay attention to their internal context, and make sure they are **applying for grants from a position of strength.**

What does this look like?



Organizational Readiness

- Vision, mission, values alignment
- Organizational credibility
- Organizational capacity
- Grants as one of several revenue streams
- Relationship development
- On-going information gathering
- Systems, schedules, accountabilities
- Follow-through

It's important to commit yourself to applying to a grant *only* if you match *all* the foundation's qualifications, and you're willing to research and write *tailored* applications for each foundation. Too many organizations go "grant-chasing" and that often results in mission drift where they are bending themselves out of shape to try and fit into a funder's priorities.

Organizational credibility and capacity are also critical. This means having a good reputation and dependable people who are knowledgeable about the organization's mission and committed to its vision. Be prepared to **commit the resources and time** to research foundations and grant opportunities, as well as **invest in training** for staff and/or volunteers. Investing time up front to learn, plan, research and systematize, that is, developing capacity for grantseeking - will pay off in efficiencies and greater success.

It's also important to **understand that grant funds should only be one component of a healthy, diversified revenue stream** – usually recommended to be not more than 20-25%.

And understand that some of your grant applications will be rejected, even when it's a good project from a good organization and a good fit with the funder. Keep in mind that no might mean "no for now" and that grant writing as a revenue stream is for those willing to play the long game. And part of that is developing appropriate relationships with

funders.

Always plan ahead – continually be gathering information on funders and grant opportunities; and **get organized** - identify roles and responsibilities; create a calendar/schedule; create operational efficiencies by having information ready, such as a good org. description, current financial data, etc.

And of course, follow through by responding to requests for more information, by implementing the project, thanking the funder, and submitting reports.



Grantseeking: Key Steps

- Planning your project/program
- Identifying funding sources
- Organizing your approach, scheduling, developing systems
- Preparing LOIs, proposals, applications
- Follow up and follow through

And these are the key steps involved.



*There is always
money, only the
pockets change.*

-Gertrude Stein





Sources of Grant Funding

- Private and Public Foundations
- Trusts
- Donor Advised Funds
(foundations, other charities,
financial institutions)
- Business/Corporate
- Government – all levels
- Service Clubs; Employee
Groups; Unions
- United Way



There are over 10,000 public and private foundations in Canada, as well as innumerable foundations in the US and globally.

In addition, there are governmental and intergovernmental agencies that provide grants, as well as service clubs, employee groups, and corporate funders.

Donor Advised Funds, at foundations and financial institutions, act similar to private foundations, and are a growing source of grant funding, though usually more difficult to access.




Online Funder Searches

- General searches Eg. just **Google**
- Funder and affinity group websites
- CRA website
- Charity Village
- Free databases
- **techSOUP** for advice and discounts
CANADA
- Paid/subscription databases
Eg. ~~Imagine Canada~~ **GrantConnect**

Healthy Aging. At home. In community. 12

You can do a lot of good research by just Googling, and one thing will lead to another, and before you know it, you've spent several days at it and have a fairly good prospect list. You can get a head start by looking at websites such as Charity Village, or the Victoria Foundation, which includes listings of other funders, and Northern Development Trust, which includes links to various databases.

The number of paid databases has increased significantly in recent years. Grant Station, Ajah, Foundation Search Canada, iWave, Charity Can... These typically give some limited information at no charge, but require a paid subscription to capture any detail.

Imagine Canada's paid database GrantConnect is available through VPL to anyone with a current card BUT you have to access it from the library.

Tech Soup Canada provides excellent advice and recommendations on subscriber databases, including info on available discounts.

There are many free databases, ("Funds for NGOs" databases) and the workbook has a list of them.



What other suggestions do you have for identifying potential funders? Type them in the message box and we will read them out.

Eg.

-past donors

-Word of mouth

-Watch who the donors are for similar organizations, which can give information on donor priority and interest that may not be available online (e.g. for donors that don't have websites and are not listed in databases, as is the case for many corporate donors)



Research Filters

- Organization eligibility
- Subject area
- Geographic area
- Type of funding
- Amount of funding
- Timing
- other

The basic filters you'll use to narrow down the fit between what you're seeking funding for and the funder's interests are:

- Eligibility** – eg. charitable registration. Individuals, business etc.
- Subject area**, such as health, education, employment, social services
- the **geographic area** where your work takes place
- what type of funding**, such as capital, project, operational, scholarship, technical support
- the **amount** you're seeking
- timing**, whether short-term, multi-year, how often a funder accepts proposals and how long they take to process requests

Funding databases make this easy as you can check on boxes for each filter and include several keyword to do your searches



Know the funder

- Interests and priorities
- Funding history and capacity
- Application requirements and process
- Decision-making process
- Contact opportunities



Funders are looking for:

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



Remember, while you are looking for funders to support your cause, funders are looking for:

The “fit”: Does the proposal fit their interests, priorities, guidelines?

Credibility: Does the applicant have the reliability and reputation to be a potential grantee? Does it know what it wants to accomplish? Is it achieving its goals?

Capability: What skills do the Board and Staff bring to the project? Has the organization succeeded in other such initiatives?

Feasibility: Does the proposal advance a worthwhile project built on a good idea that can successfully be implemented by the applicant? Can it be done? (The budget is critical in assessing feasibility.)

Importance: Should it be done? Will it make a difference? Given all other requests, is this the one to support?

Corporate funders are also looking for:

marketing opportunities, visibility, employee involvement opportunities, recognition.

Foundations are looking to make their giving programs meaningful. They seek: Consistency with their organizational mission; to follow donors' wishes (the "fit").

The opportunity to make a difference. Foundations are starting to evaluate their own granting programs. They want to know that something will have changed as a result of their work.

The opportunity to make a point. They may be interested in supporting overlooked issues, or want their name associated with a particular cause.

The opportunity to build organizational and community capacity. Many funders see their work as an investment in organizations and communities.

Results, sustainability, accountability, replicability. Funders are accountable to their mandate, mission, and/or donors, thus they require accountability in the grants they make.

Increasingly, funders are interested in the evaluation and dissemination of project results to add value to their grantmaking.



Keeping Track

Funder	Application Process	Deadline/ Decisions	Action	Status
Kiwanis	On-line application		Applied May 2017	Declined
North Vancouver Community Grants	Submit by email: csac@dnv.org	January 31, 2018	Submitted Jan. 9/18 for \$5000	Approved for \$4500
North Shore Community Foundation	Download grant application package http://nscommunityfoundation.com/how-to-apply/	Sept. 30	Submitted Sept. 29 for \$3500	
United Way Active Aging and Choose to Move grants	Information session; On-line application	Feb. 9/18		
Normanna Foundation	Not stated	Not stated	LOI sent April 25/18	

Funder research can be very time-consuming, but developing systems will make it more efficient, and of course it's essential to develop a good system to keep track of your research and progress.

And research should be on-going – develop your grants “radar” and you’ll start noticing funding opportunities all over the place!



Keeping Track

- Name of funder:
- Contact Person/Title:
- Address:
- Phone:
- E-mail:
- Website:
- Other contact info:
- Past support received (if any): Amount: Date:
- Purpose/Allocated for:
- Funding cycle:
- Date to submit request:
- Process/Instructions:
- Suggestions from funder:
- Other suggestions or ideas:
- Action taken:
- Follow-up/Comments:
- Results:

And for each grant received, you will want to have a system in place to record and regularly update details of the grant and the relationship with the funder.



Funders' Questions

- Who are you?
- What do you want?
- Why do you want it?
- What resources are needed and where will they come from?
- How will you use them?
- What difference will it make?
- Other

These are the basics of what funders want to know, but they may also have potential questions, which we'll look at shortly



Answers: Grant Proposal Basic Components

- Project/Executive Summary
- Introduction to organization/general background
- Description of problem, need or opportunity
- Project/program description: goals, objectives, strategies
- Methods/activities or workplan
- Evaluation/measurement plan
- On-going or future plans
- Budget

The answers to these questions are the components of a typical grant application or proposal.

Different funders may have different terminology, formats, levels of sophistication

Some funders will provide an application form; others will list the components they want to see included.

While applications are increasingly submitted on-line, some funders still require print and by mail.



Letter of Inquiry Letter of Intent

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

An LOI is like a mini-proposal or concept paper- typically two pages, or if on-line, may be limited to a certain number of words.

In LOIs, you should “lead with the need”.

LOIs are also increasingly on-line – AND more complex in some cases- more like a full proposal.

As a screening tool, LOIs usually save the funder and the applicant a lot of time; they are also a useful tool for “cold calling”



Description of Problem, Needs or Opportunity

- The “why” of the proposal
- Defines the problem –explains its importance and implications
- Demonstrates the relationship to the organization’s mission and mandate
- Must be clear and compelling
- Includes facts and data
- Validates the need, referencing research, needs assessments, previous projects
- Include examples, stories, quotes

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

The description of the need or opportunity is a critical part of the proposal—it provides the rationale for why this is important to support. It should describe the nature and extent of the problem or opportunity, and why the applicant is in a good position to do something about it.

It’s important to include data to substantiate the need, but it’s also important to talk about what those numbers mean in human terms, that is, telling the story of how individuals are affected. That’s why we say: ***“No numbers without stories; no stories without numbers.”***

Thinking about your CBSS, what number is significant and why?

For example,



Project/Program Description

- Goal(s)
- S.M.A.R.T. Objectives
- Strategies
- Activities- may be described as:
 - Workplan, Action Plan or Schedule
 - Critical path
 - Gantt Chart
 - Logic frame or Theory of Change
- Results/Evaluation

Programs and projects are different, but for our purposes today, they can usually be used interchangeably.

These are the typical components of a project description, though different funders may use different terminology.



Budget

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



The budget is also a critical part of the proposal, and if not detailed, accurate, balanced and realistic, will usually result in losing the grant.

It should always be broken down to show how figures were arrived at.



Other questions funders may ask...

- What challenges, risks, or barriers do you expect to face and how will you overcome them?
- How is the target population involved?
- Who will benefit?
- Who have you consulted about the project?
- What is the communications plan?
- How will you disseminate project results?
- What are the opportunities for funder acknowledgement, participation?

These are some of the other kinds of questions funders may ask, as well as things like:

How many volunteers are involved? Directly? Indirectly?

How many people are affected? Directly? Indirectly?

Increasingly, for government applications, there may be questions about environmental impact.

- Project partners
- CVs for key project staff
- It is also important for applicants to demonstrate they have the capacity to do the kind of project being applied for. (at CW4WAfghan we keep a file ready called Previous Projects as so many applications ask for this and it's time consuming to prepare, so we have all those details ready when they are needed) as well as specialization (they intimately know the problem being addressed, and are not just going for the money because it's there)



Refining the Proposal

- Clear
- Concise
- Complete
- Compelling
- Accurate



Once you have developed a draft, you'll want to refine it, aiming for a proposal that is clear, concise, complete, compelling and accurate.



Clarity: Writing

- Plain language
- Specific, not abstract or vague
- Avoid jargon, colloquialisms, difficult vocabulary
- Use correct grammar, punctuation
- Active voice –speak directly to reader
- Consistent and appropriate tense and pronouns
- Logical order and good flow
- Style appropriate to reader and situation

For clarity in writing aim for:

- plain language, such as avoiding jargon, colloquialisms, and uncommon and extraneous words and phrases;
- using words that are specific, not abstract or vague; also, always use the more common word, rather than uncommon vocabulary
- good grammar, correct spelling and punctuation
- use the active voice, speaking directly to the reader, and shorter sentences for more impact
- consistent and appropriate tenses and pronouns
- logical order and good flow
- appropriate style, with the degree of formality dependent on how well the recipient is known, or the particular circumstances
- only using acronyms after the name or phrase has been spelled out in its first use



Clarity: Presentation

- Required or user friendly font type and size
- Consistent throughout
- Appropriate use of bold, italic typeface, colour
- Incorporation of white space
- Use of headings, point form, charts or tables
- Right-sized paragraphs
- Number pages; for longer proposals, include a Table of Contents

For clarity in presentation, make sure your lay-out is effective: break up long stretches of narrative by incorporating headings, presenting detail in point form, or using charts or tables.

Paragraphs should not be too long, as solid blocks of narrative can be daunting to the reader, or too short, as this can be distracting.



Refining the Proposal

- Aim for **sharp, vigorous** writing
- Eliminate unnecessary words and phrases:
 - omit redundancies
 - reduce phrases to words
 - avoid “high-carb” phrases
 - omit gratuitous intensifiers and qualifiers
 - avoid clichés
- Reinforce, but don’t repeat
- Make every word count!



In one of your proofreading passes, go through the whole proposal looking for and eliminating extraneous or repetitive words and phrases.

The on-line applications that limit the number of words or characters really force you to make every word count!



Compelling: Passion and Vision

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

It's really important to hit the head and the heart, by balancing intellectual and emotional appeal, but do NOT aim for the kind of drama or emotion commonly used in direct mail



Accurate

- Ensure all required questions are answered
- Ensure facts, data, quotes, citations are correct
- Ensure board member listing is correct and current
- Budgets:
 - check and re-check addition, multiplication
 - ensure amount requested in cover letter and application is consistent with budget figures

Another proofreading pass through should focus on accuracy, first making sure that you have answered every question, but also re-checking data, budget figures etc.



Complete

- Cover letter
- Proposal / application
- Attachments:
 - financial statements
 - board of directors listing
 - annual report, newsletters
 - support letters
 - other
- Table of Contents: if required or for longer proposals

Unless it's an on-line application (not an emailed proposal), always include a cover letter – this allows you to note anything that didn't fit into an application form, such as a project summary, or funder recognition ideas, and to refer to attachments, as well as “frame” for the funder, that is, point out how it's a fit with their interests and priorities, which demonstrates that you've done your research.



Strategies to Review and Refine

- **Proofread**, and proofread again
- **Take a break**
- **Proofread** by reading out loud
- **Have another person proofread**
- **Prepare and use a checklist**
- **Use tools** such as a calculator, dictionary, thesaurus and spellcheck
- **Review** references and data against the original material

Here are some helpful strategies to refine the proposal to make it as clear, concise, accurate, complete and compelling as possible:

Proofread, and proofread again - When writing a lengthy document, it is easy to miss typos and errors in grammar and punctuation, and it may take several reviews to catch every mistake.

Proofread by reading out loud – Even when reading silently, most readers are saying the words out loud in their mind. Reading a proposal out loud helps you to hear what the reader will “hear”, and helps you notice such things as how well it flows, too frequent repetition of words, inconsistencies in tense and pronouns, grammatical errors, use of jargon, and run-on sentences.

Have another person proofread – The writer is often too close to the project and proposal to be critical and objective. Feedback from someone not familiar with it will help identify problems such as typos, grammatical and punctuation errors, and use of jargon, but it can also help identify bigger problems. Do they understand it? Does it make sense? Does it add up? Are they left with unanswered questions? Does it engage and motivate them? In other words, is it clear, complete and compelling?

Prepare and use a checklist throughout the grantwriting process to ensure that all components and details are being taken care of, and included with the final submission.

Use tools such as a calculator, dictionary, thesaurus and spellcheck to ensure accuracy, correct usage and spelling.

Review references and data against the original material. Include links and citations where appropriate.



Evaluating Grant Applications

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

When funders are assessing proposals, there is a wide range of approaches; most are objective, but some based on relationships or other factors.

These are the typical areas that funders look at when evaluating grant applications. Some funders will tell you specifically how they assess or rate applications, for example, how much weighting in various areas such as strength of the project team, effectiveness of the proposed approach, the budget, etc.

The “three pile” approach is common to initially sort through applications: 1) probably yes 2) maybe 3) most probably no

Keep in mind that funders are human, and there is often subjectivity and biases involved. Also, funders talk to funders – both in informal networks, but often also as part of their assessment process.



Proposals that stand out

- **demonstrate** a clear fit with funder priorities and interests
- **describe** an important issue or opportunity and what will be done to address it
- **highlight** a credible organization that has the ability and capacity to undertake the work proposed
- **propose** feasible strategies and a budget that is appropriate to program goals and objectives
- **invest** their own cash and/or in-kind resources in the initiative
- **commit** to achieving realistic and measurable outcomes



If you receive a grant...

- Say 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

In one of your proofreading passes, go through the whole proposal looking for and eliminating extraneous or repetitive words and phrases.

The on-line applications that limit the number of words or characters really force you to make every word count!



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

Good grant reports have the same qualities as good proposals – they are clear, concise, complete, compelling and accurate.



Top 10 Tips ...plus one

1. Get organized – develop a plan, systems, schedule and templates
2. Find the fit – focus on best prospects
3. “Frame” for the funder
4. Follow instructions
5. Reach the heart and the head
6. Be bold, clear, and committed
7. Demonstrate organizational capacity/credibility
8. Lead with the need
9. Focus on outcomes
10. Proof read
11. Have outsiders read

I'll close with this summary of what I've covered – I couldn't get it down to a top 10, and 11 still fit on the page, so there you have it.



A Few Resources

- Charity Village www.charityvillage.com
- BCIT Fundraising Management Program
- Imagine Canada – Grant Connect
- Idea Encore www.ideaencore.com/
- <http://www.ruralbc.gov.bc.ca/granttool.html>
- J.W. McConnell Family Foundation
- W.K. Kellogg Foundation
- "The Elements of Style" by Strunk and White
- Each other!

These are just a few of the many excellent resources available, some of which I've mentioned, such as Charity Village and GrantConnect. The McConnell Foundation and Kellogg Foundation both have excellent resources on evaluation that you can download for free. IdeaEncore is a website of non-profit resources, many of which are free, or very low cost. And for a guide to clear, concise writing, you can't beat The Elements of Style, which is also available to download for free.

And, in closing, keep in mind that you can also learn a lot from each other, whether you're a seasoned grantseeker sharing shortcuts, or a newcomer bringing a fresh perspective.

Thanks so much for your interest, and good luck with your grantseeking!



Questions?



Thank you!

For further information please visit us at:

United Way Lower Mainland: www.uwlm.ca

Active Aging: www.hiphealth.ca

Raising the Profile: www.seniorsraisingtheprofile.ca

