Exploring Grantsmanship

CBSS Webinar

May 24th, 2018

Better at Home is funded by the Government of BC and managed by the United Way.

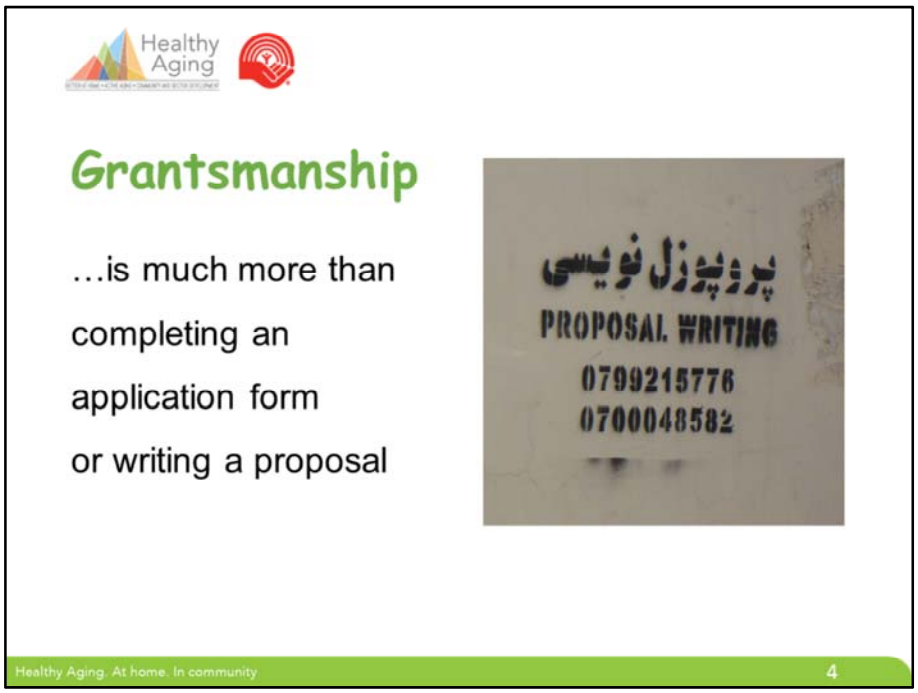
A few questions…

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?

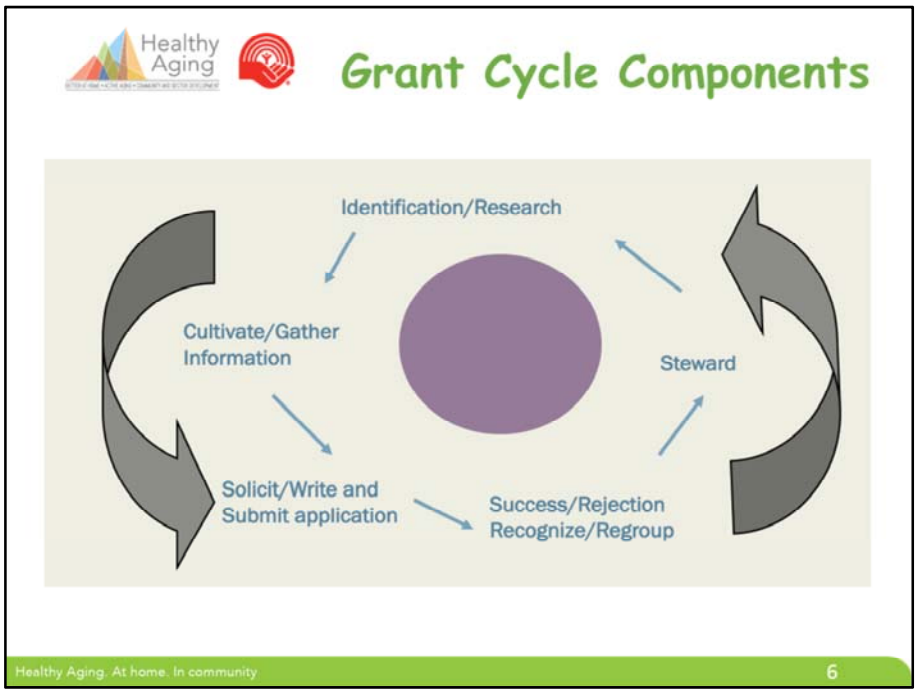
This morning's webinar is a basic introduction to grantsmanship – intended for beginners, or those who are looking for a quick refresher on the topic.



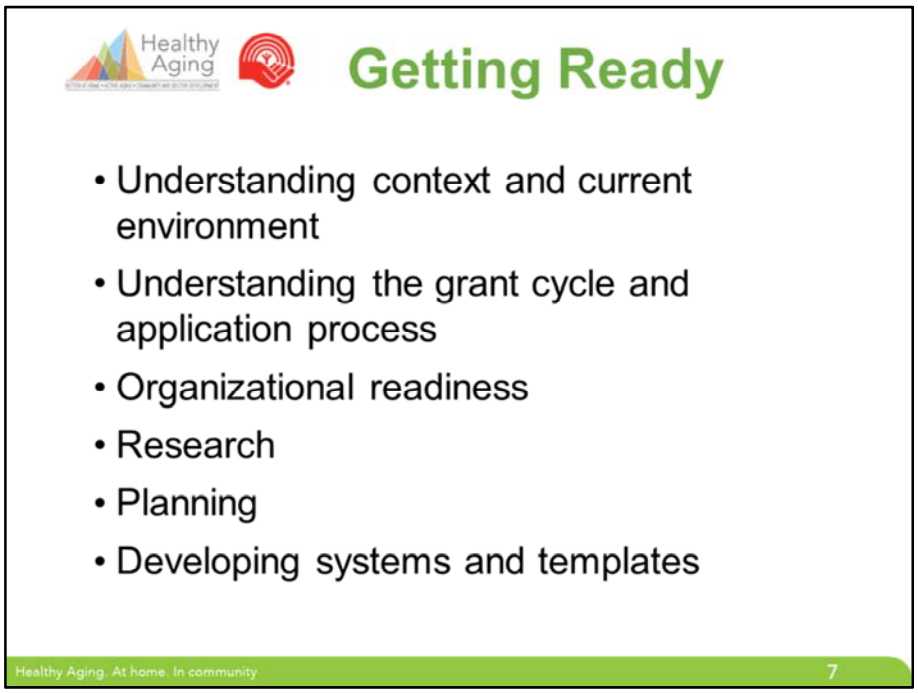
Although we usually talk about Grant and Proposal Writing, I always prefer to talk about grantseeking or grantsmanship, because a successful proposal is much more than just filling out an application form.

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!



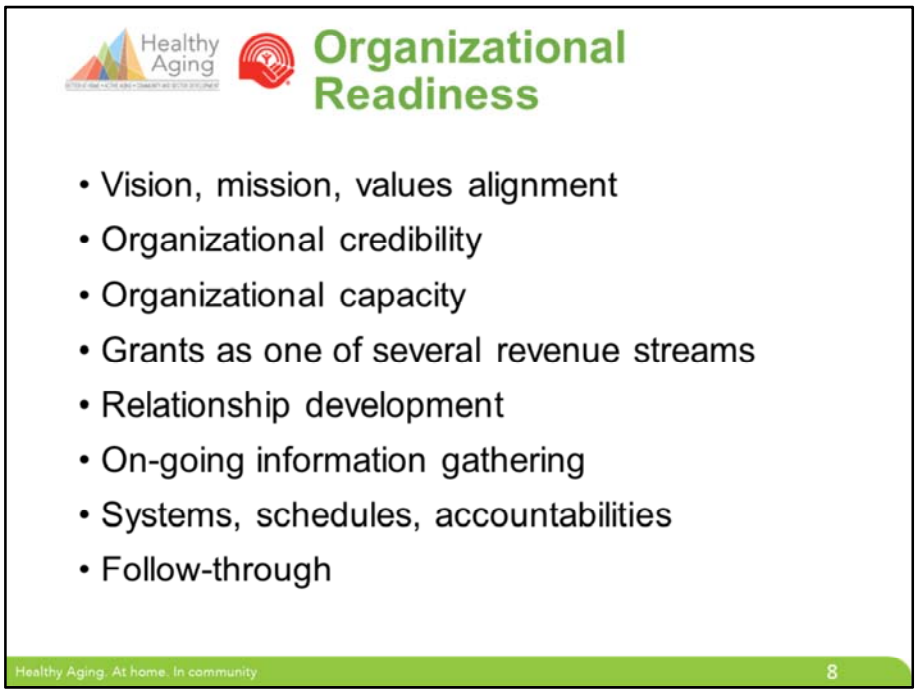
Or put another way, it's a process of research, cultivation, proposal development and submission, success – or not – and stewardship.



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?



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.

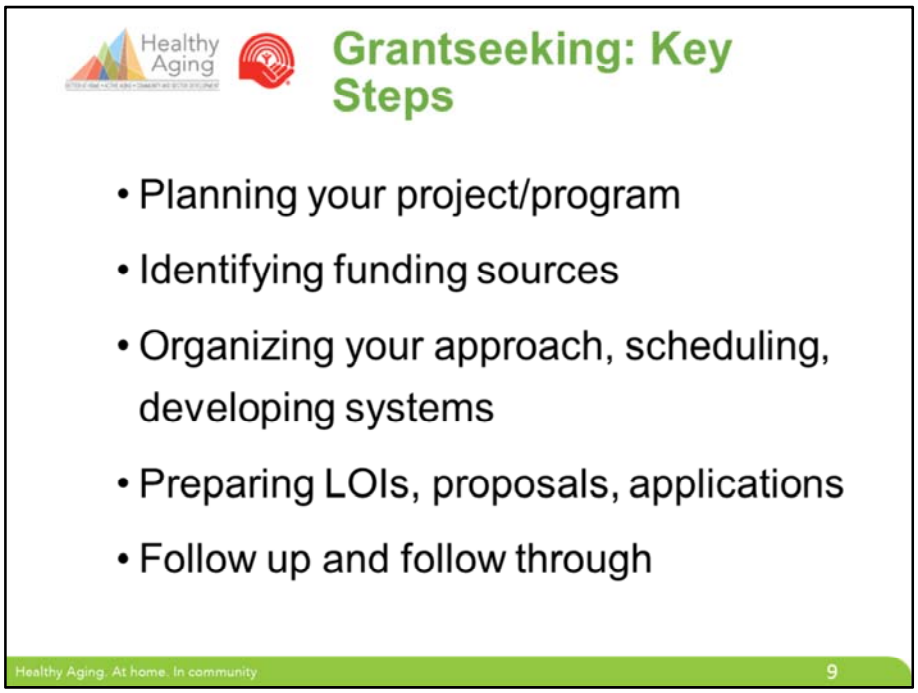
It's also important to **understand that grant funds should only be one component of a healthy, diversified revenue stream** – usually recommended to be not more than 20-25%.

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.



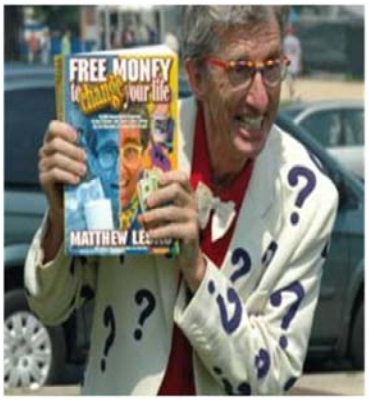
And these are the key steps involved.

There is always money, only the pockets change.

-Gertrude Stein

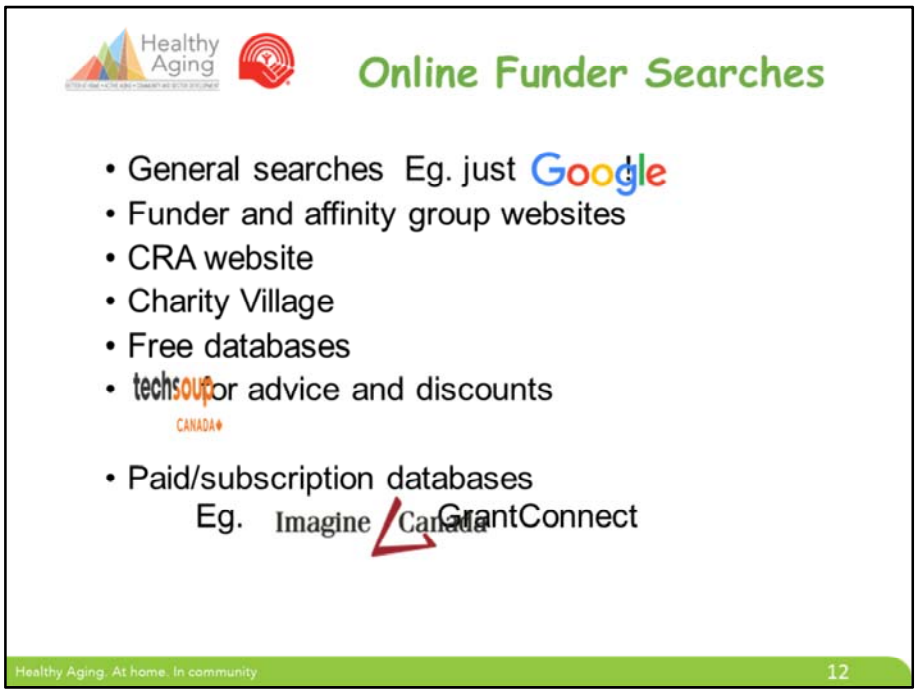
Sources of Grant Funding

- 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.



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)

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

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?

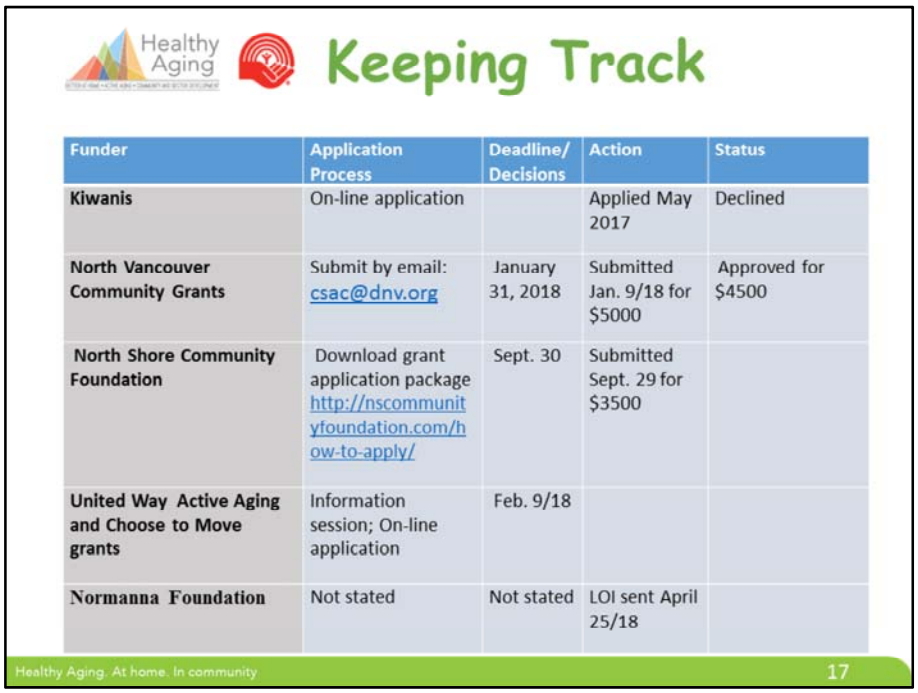
Capability: What skills do the Board and Staff bring to the project? Has the organization succeeded in other such initiatives?

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.

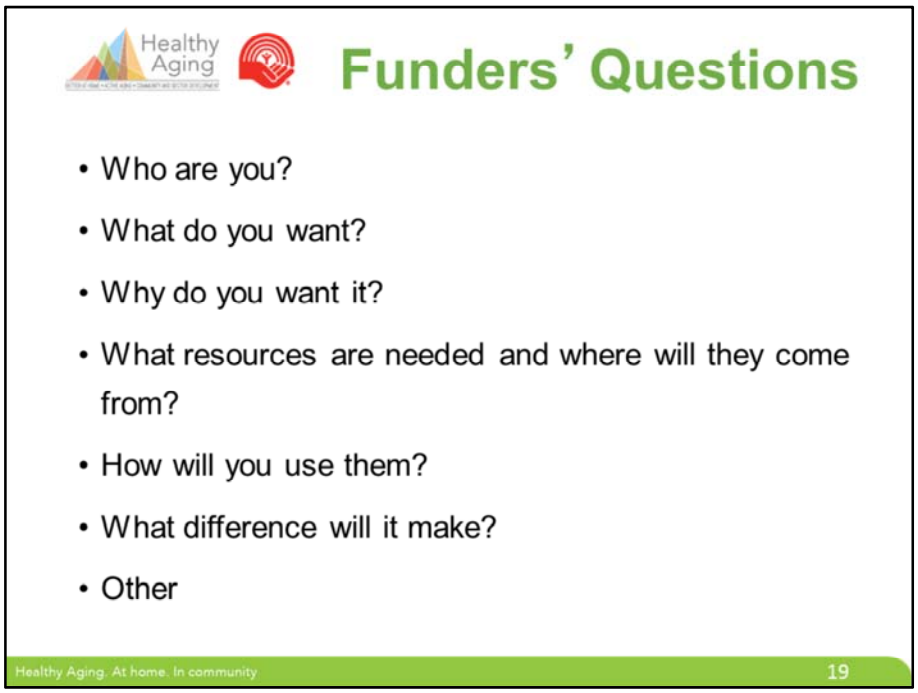
Foundations are looking to make their giving programs meaningful. They seek:
Consistency with their organizational mission; to follow donors' wishes (the "fit").
The opportunity to make a difference. Foundations are starting to evaluate their own granting programs. They want to know that something will 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.



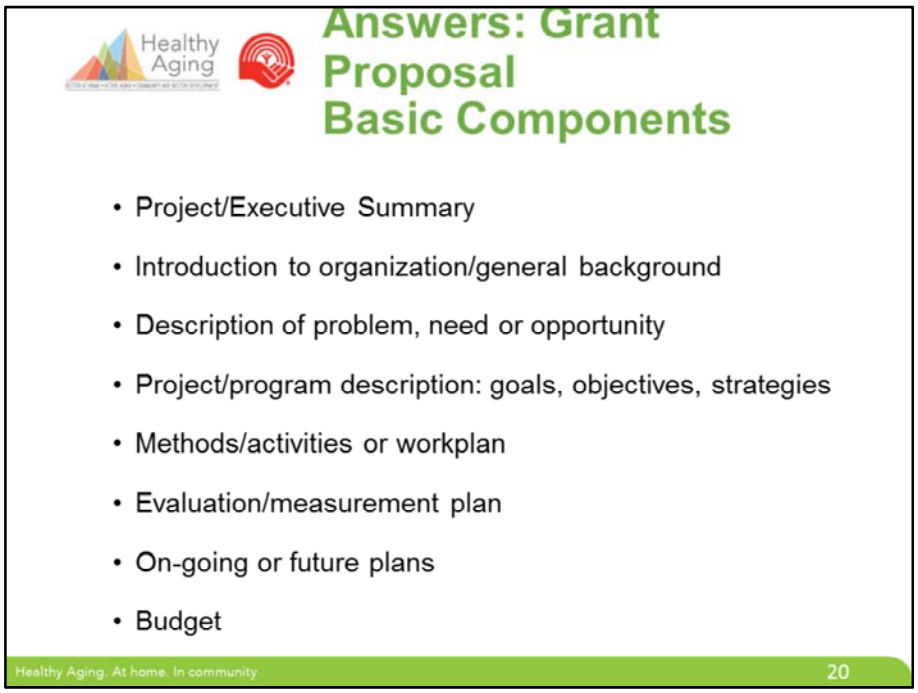
Funder research can be very time-consuming, but developing systems will make it more efficient, and of course it's essential to develop a good system to keep track of your research and progress.

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

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.



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

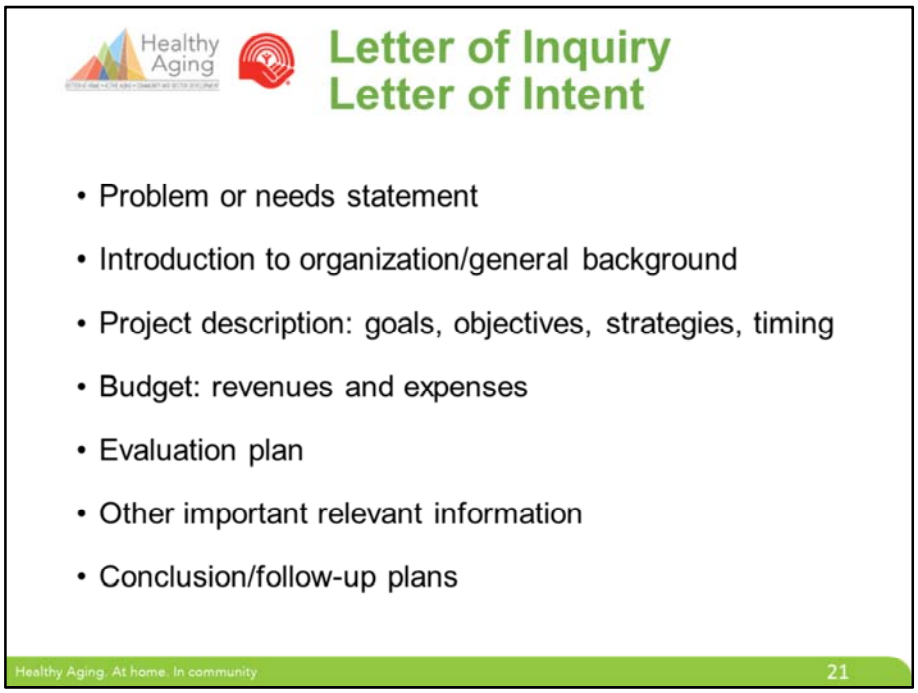


The answers to these questions are the components of a typical grant application or proposal.

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.

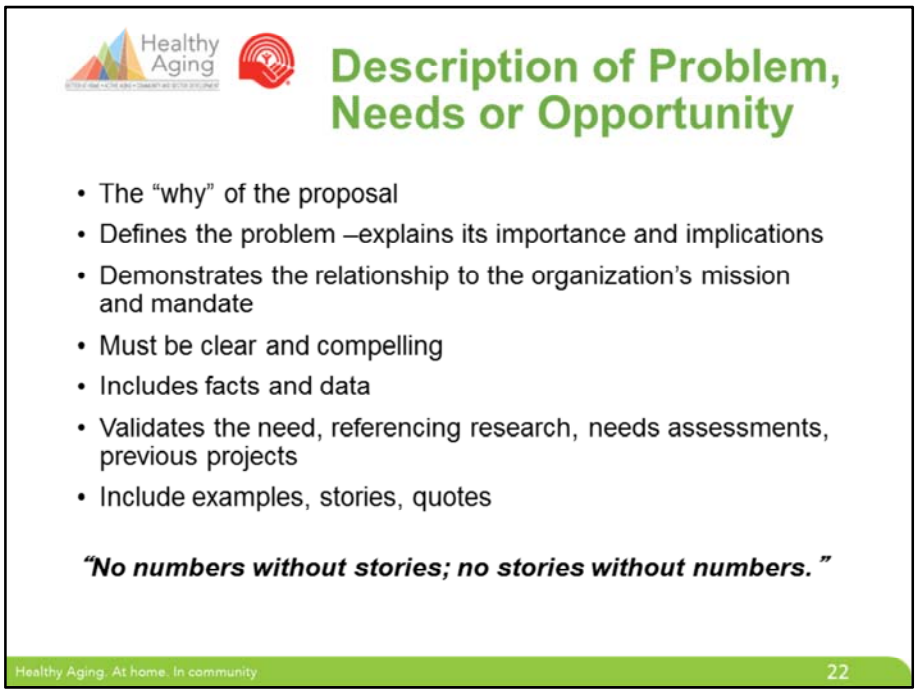
While applications are increasingly submitted on-line, some funders still require print and by mail.



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”

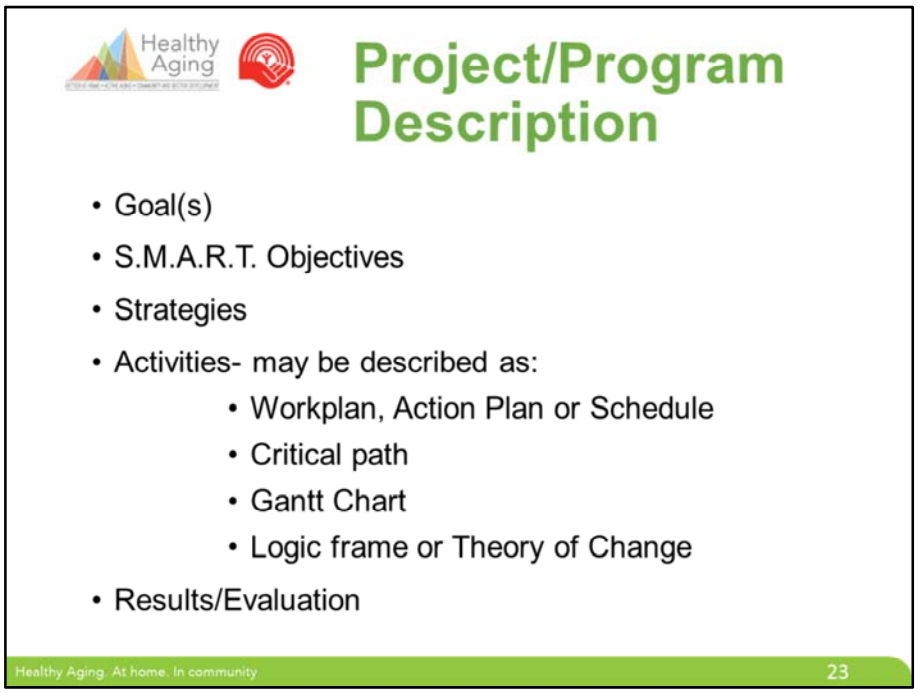


The description of the need or opportunity is a critical part of the proposal –it provides the rationale for why this is important to support. It should describe the nature and extent of the problem or opportunity, and why the applicant is in a good position to do something about it.

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.***"

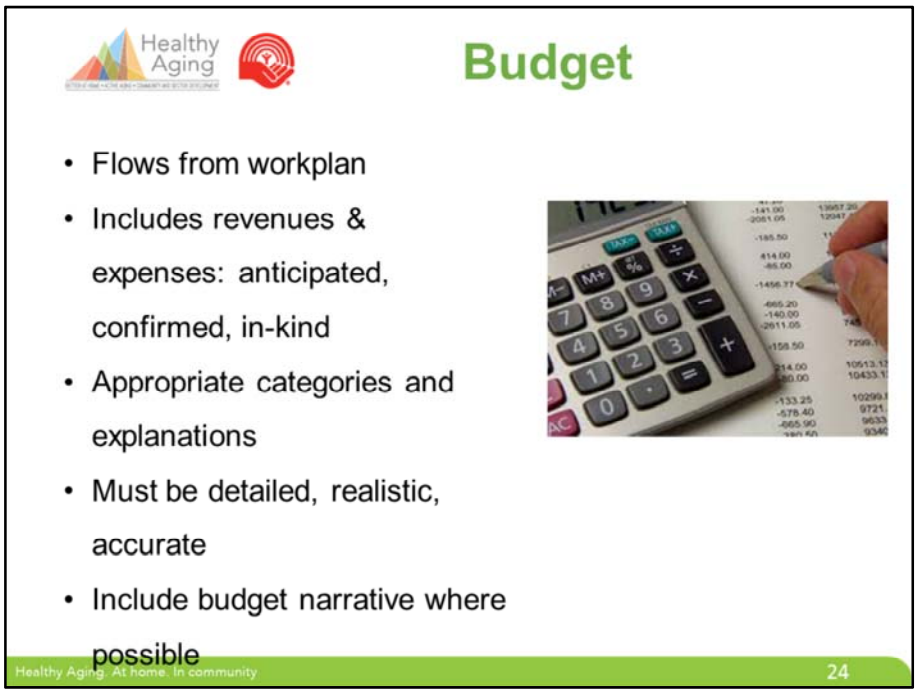
Thinking about your CBSS, what number is significant and why?

For example,



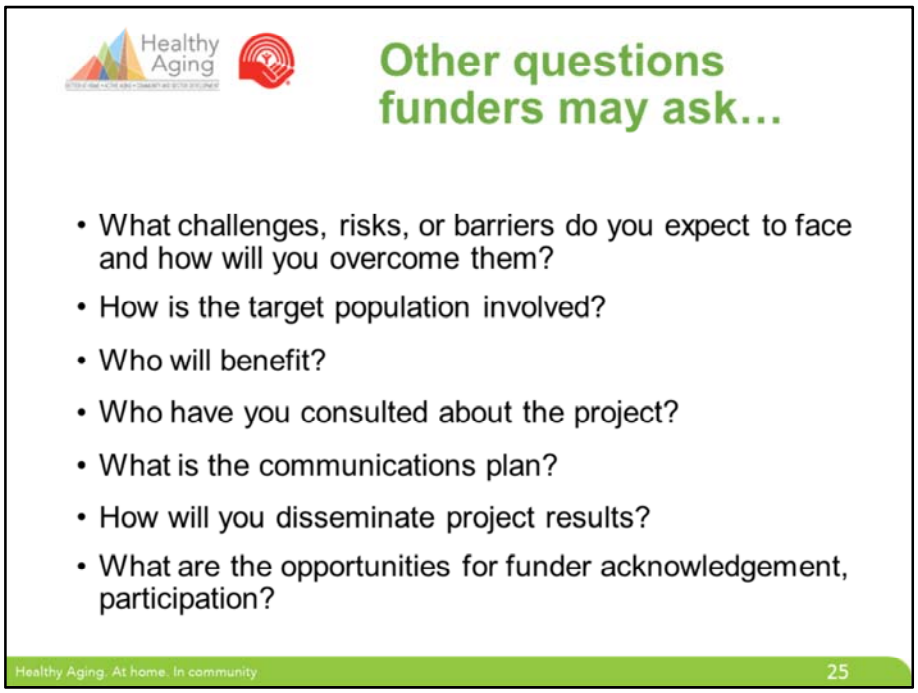
Programs and projects are different, but for our purposes today, they can usually be used interchangeably.

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



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.



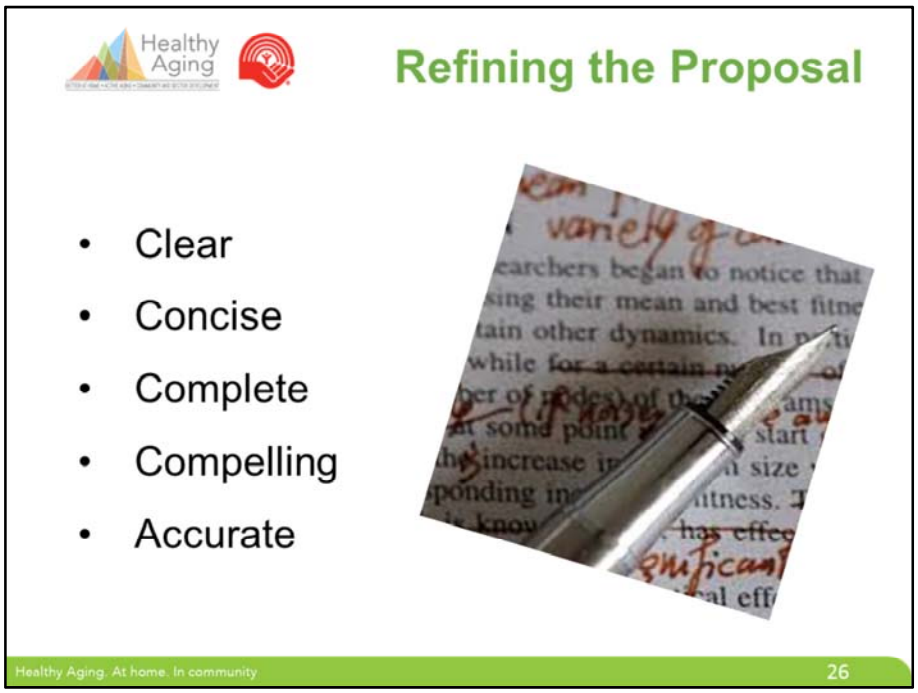
These are some of the other kinds of questions funders may ask, as well as things like:

How many volunteers are involved? Directly? Indirectly?
How many people are affected? Directly? Indirectly?

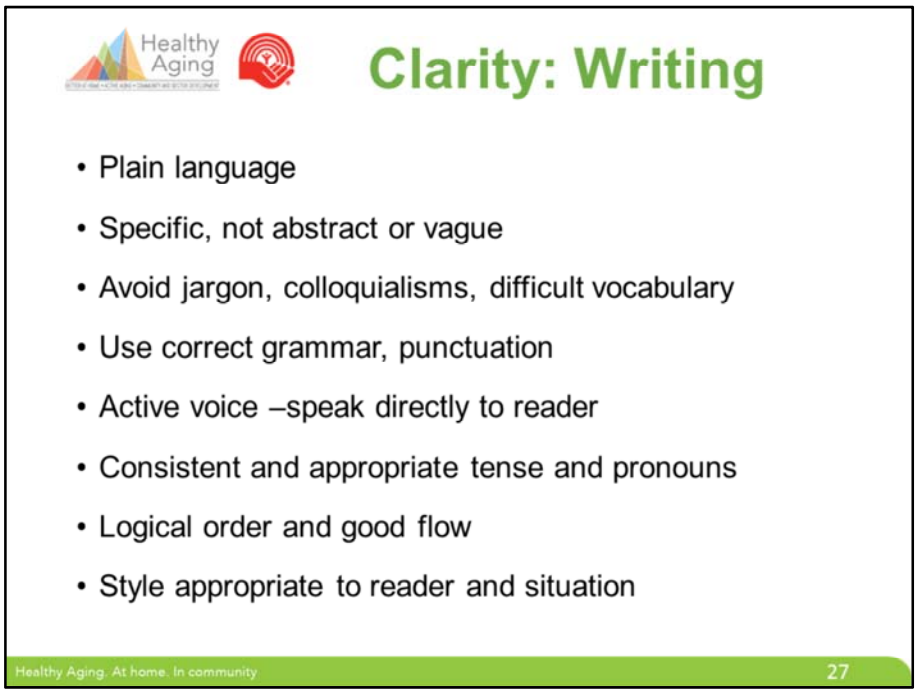
Increasingly, for government applications, there may be questions about environmental impact.

- 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)

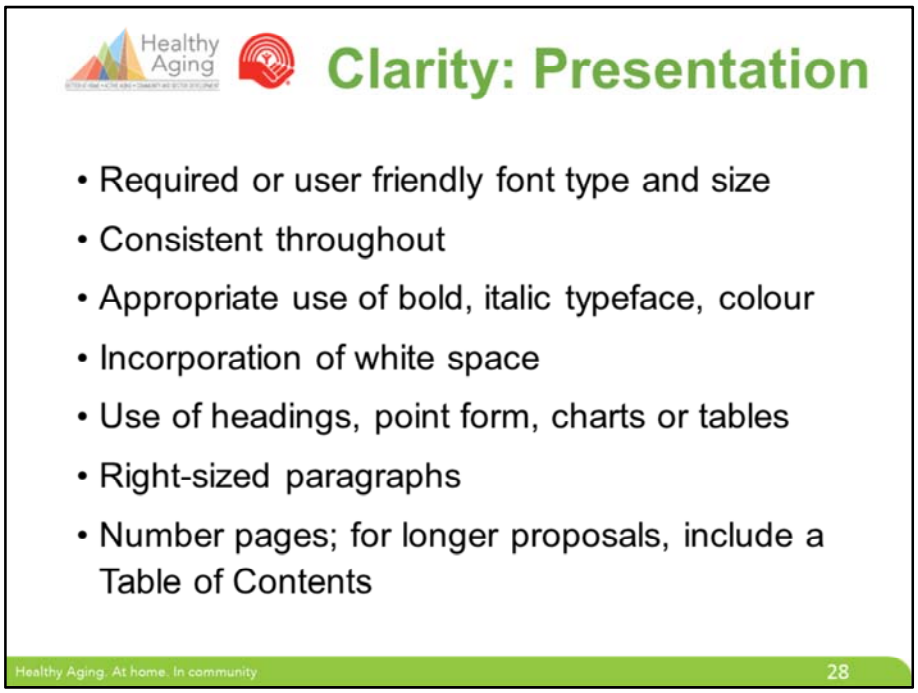


Once you have developed a draft, you'll want to refine it, aiming for a proposal that is clear, concise, complete, compelling and accurate.



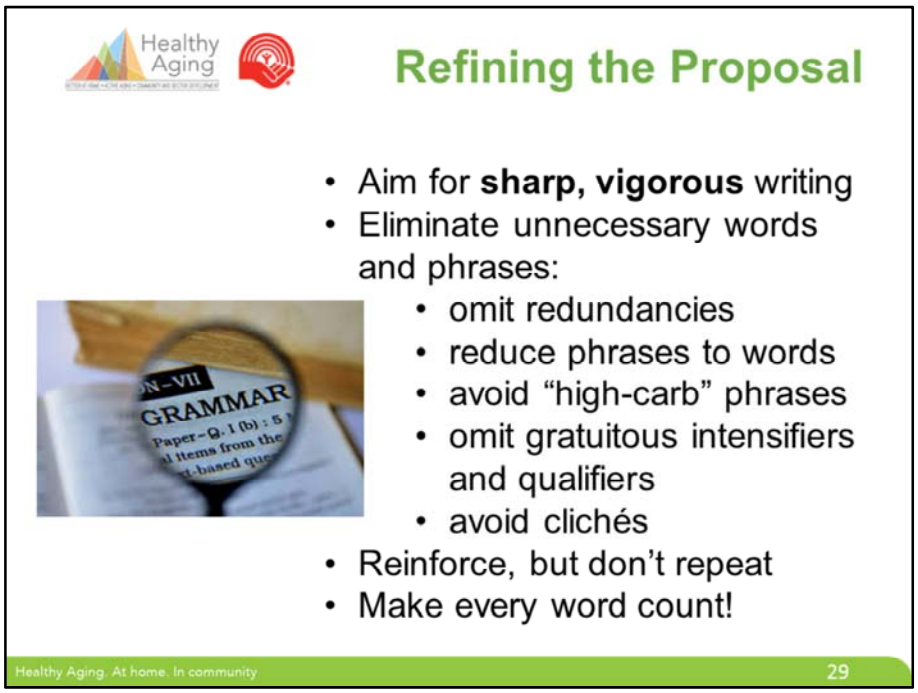
For clarity in writing aim for:

- 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



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.

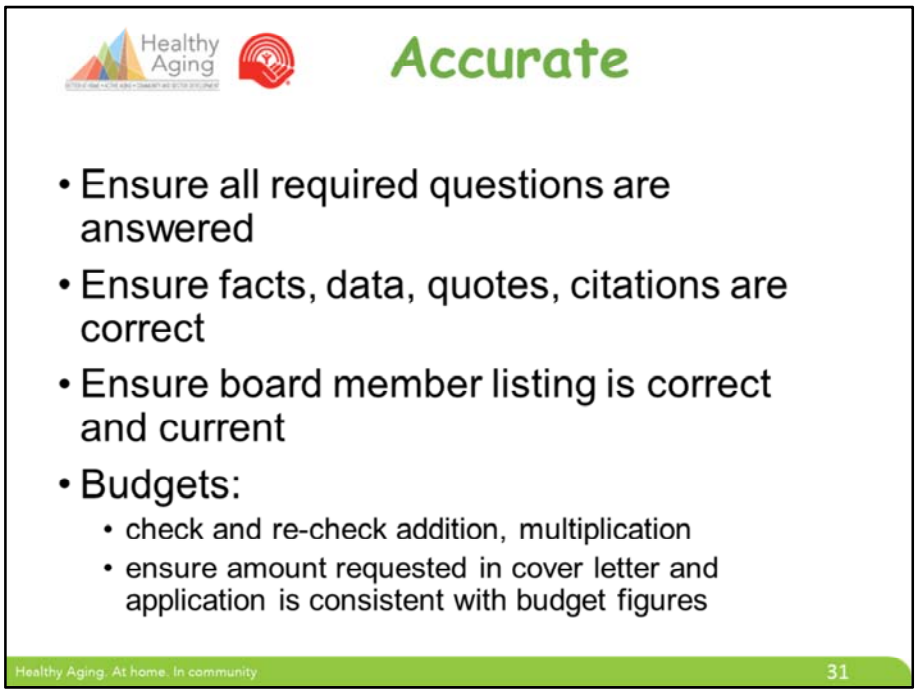
Paragraphs should not be too long, as solid blocks of narrative can be daunting to the reader, or too short, as this can be distracting.



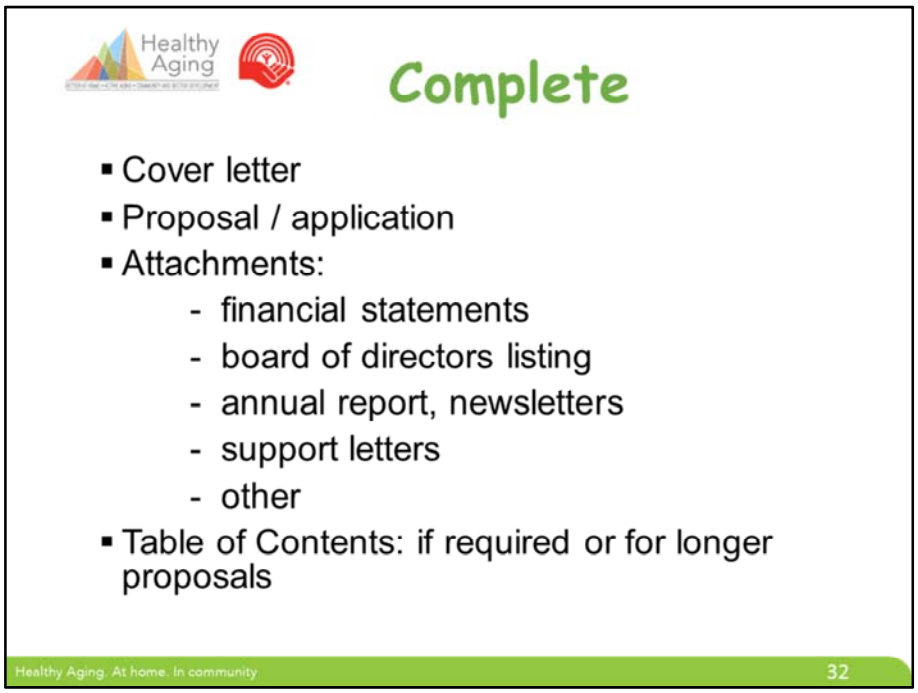
In one of your proofreading passes, go though the whole proposal looking for and eliminating extraneous or repetitive words and phrases.

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

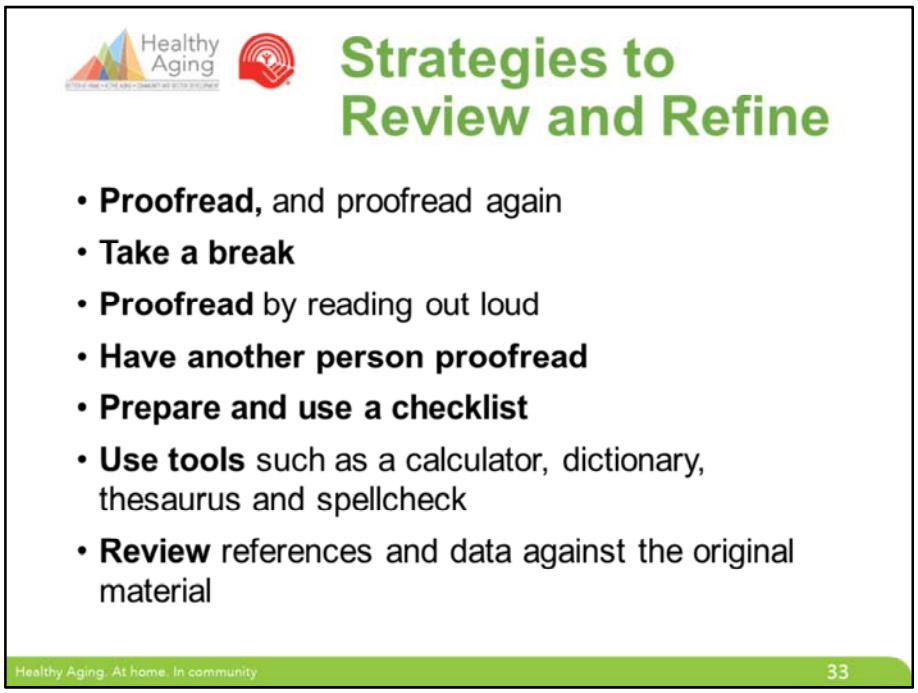
It's really important to hit the head and the heart, by balancing intellectual and emotional appeal, but do NOT aim for the kind of drama or emotion commonly used in direct mail



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.



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.



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.

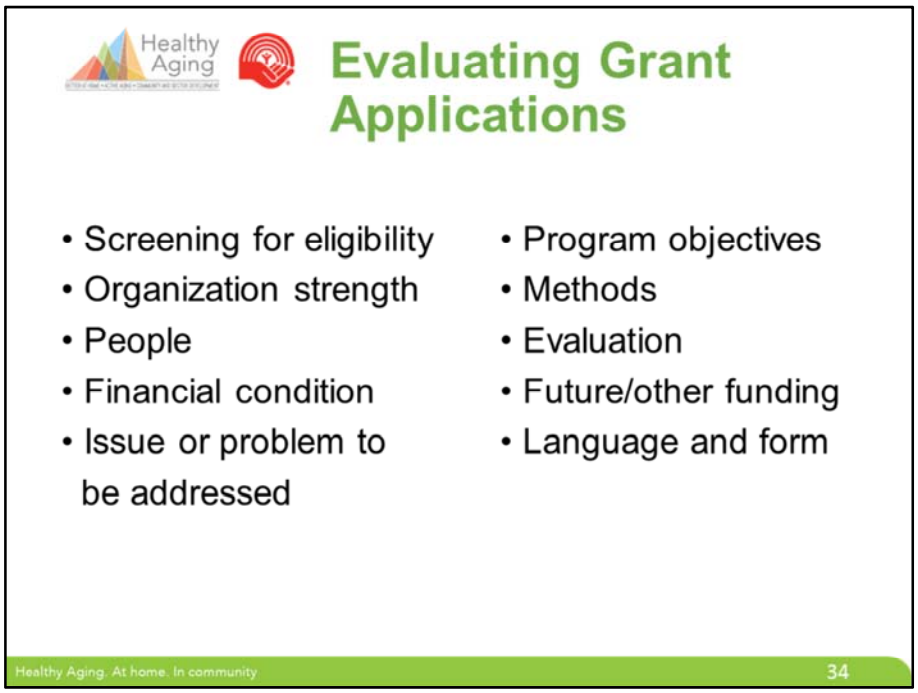
Proofread by reading out loud – Even when reading silently, most readers are saying the words out loud in their mind. Reading a proposal out loud helps you to hear what the reader will "hear", and helps you notice such things as how well it flows, too frequent repetition of words, inconsistencies in 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.



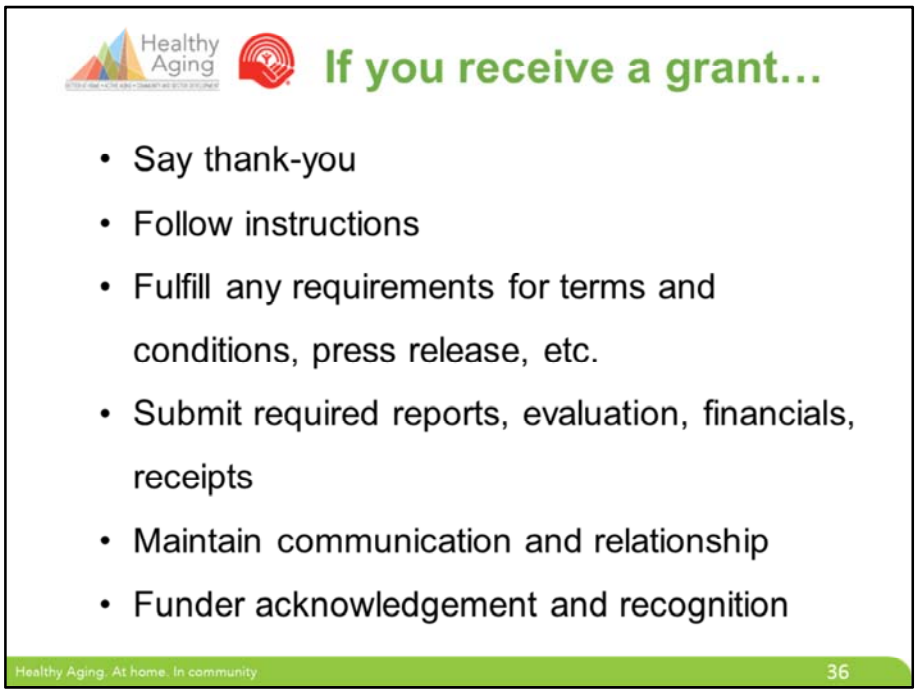
When funders are assessing proposals, there is a wide range of approaches; most are objective, but some based on relationships or other factors.
These are the typical areas that funders look at when evaluating grant applications. Some funders will tell you specifically how they assess or rate applications, 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



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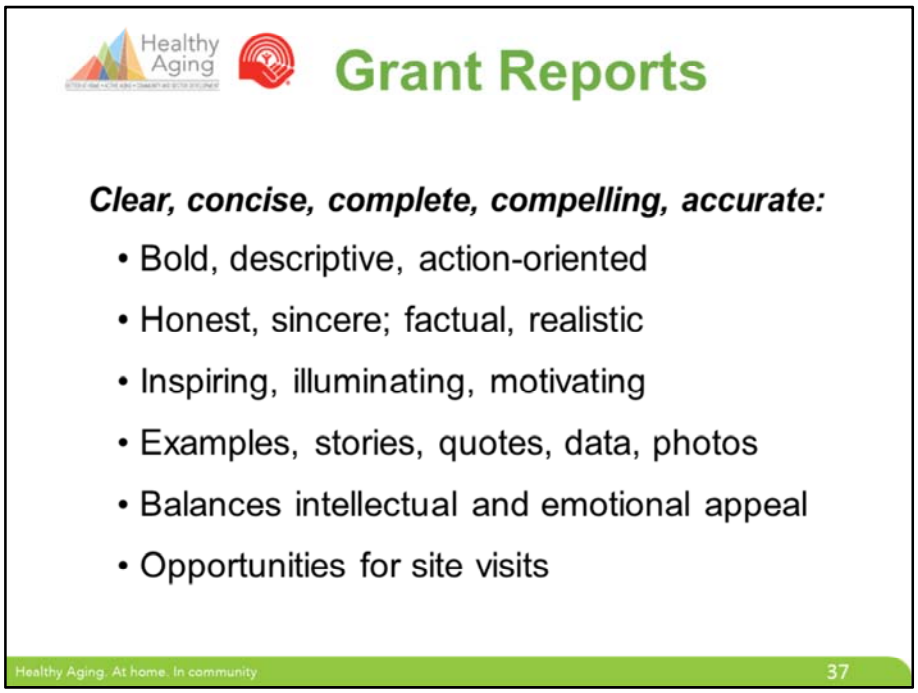
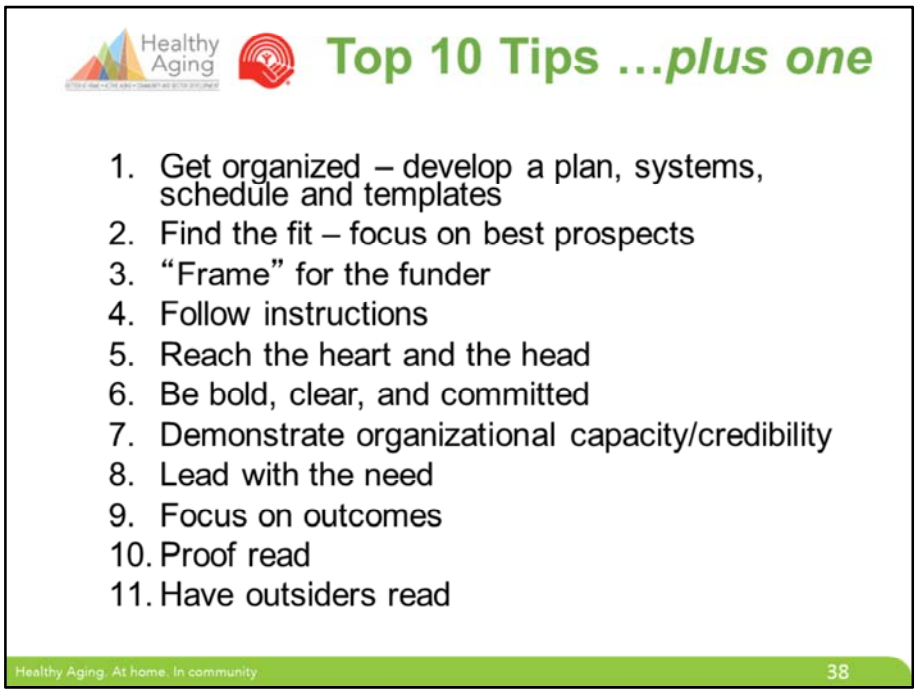
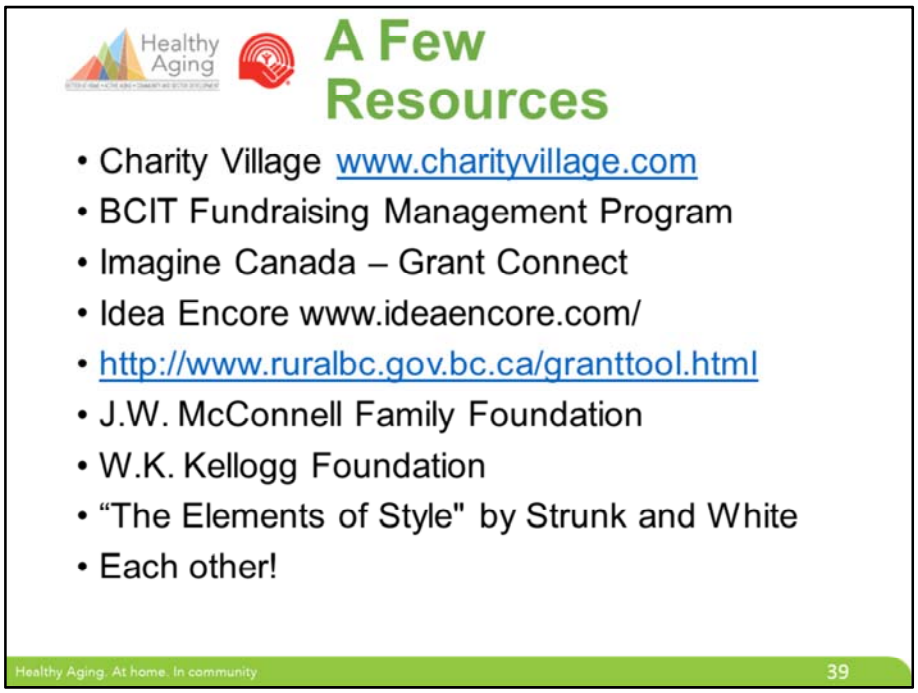


Good grant reports have the same qualities as good proposals – they are clear, concise, complete, compelling and accurate.



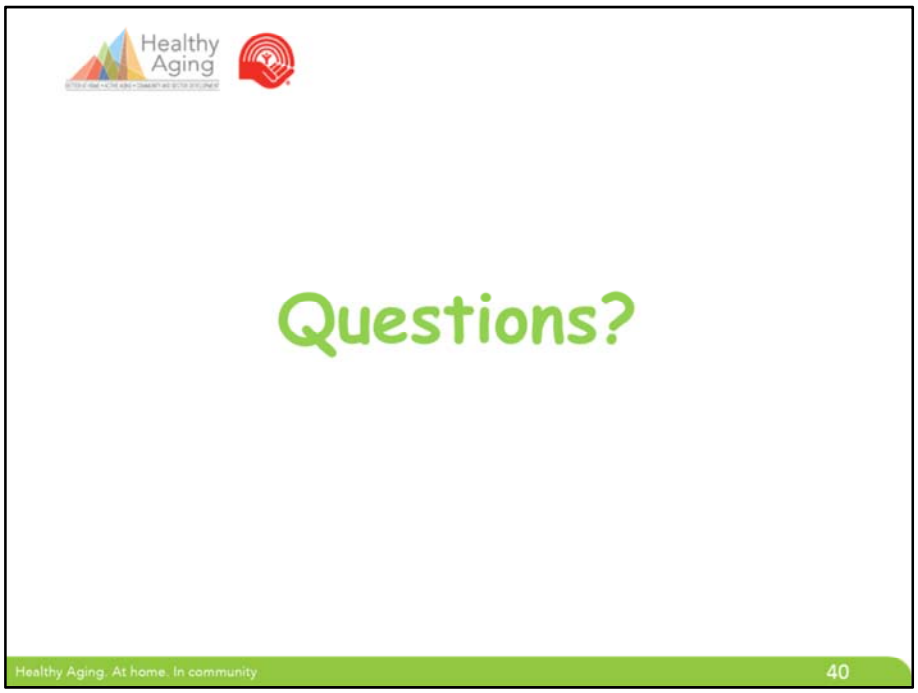
I'll close with this summary of what I've covered – I couldn't get it down to a top 10, and 11 still fit on the page, so there you have it.



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!


Healthy Aging
Questions?
Healthy Aging. At home. In community
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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