

Funding for Good

# Grant Writing

## What The Pros Know



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# Funding For Good

## Owner, Mandy Pearce

Business Planning • Business Coaching • 60-Day  
Consultant Boot Camp • Consultations • Budgeting •  
Nonprofit Consulting Conference • Development  
Coaching • Executive Search Services



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# TAKEAWAYS



Determine if your organization is grant-ready.



List and describe six of the major elements of most grant proposals.



Identify the steps to be proactive in your grant writing, instead of reactive.



Explore crafting a data-based description of need.



Learn to define specific, measurable outcomes and demonstrate that your organization can deliver them.



Understand the need for grant research and become familiar with questions to answer before beginning prospect research.





“Relationship building is the most important part of all fundraising.”

- Funding for Good



# Getting Grant Ready

- Official Name
- Tax Id#
- Date of Incorporation
- Address (physical and mailing)
- Phone
- Social Media Info.
- Mission/Vision Statements
- FY Begin/End Dates
- Annual Operating Budget
- Programs Offered
- Clients Served





# Grant Readiness Assessment

## part 1

### ORGANIZATIONAL BACKGROUND

- |                                                                              |                                                                 |
|------------------------------------------------------------------------------|-----------------------------------------------------------------|
| <input type="checkbox"/> Address, Phone, Web Address                         | <input type="checkbox"/> Target Population                      |
| <input type="checkbox"/> History of Organization (narrative)                 | <input type="checkbox"/> Current Programs/Services Descriptions |
| <input type="checkbox"/> Year Established                                    | <input type="checkbox"/> Number Served in Previous Year         |
| <input type="checkbox"/> Mission, Vision, & Values Statements                | <input type="checkbox"/> Number FTE                             |
| <input type="checkbox"/> Service Area/Location Addresses/Contact Information | <input type="checkbox"/> Other/Notes                            |

### TAX DOCUMENTS

- |                                                   |                                                           |
|---------------------------------------------------|-----------------------------------------------------------|
| <input type="checkbox"/> Tax Exempt Status Letter | <input type="checkbox"/> Dun & Bradstreet Number (DUNS)   |
| <input type="checkbox"/> IRS Form 990             | <input type="checkbox"/> UEI                              |
| <input type="checkbox"/> W-9                      | <input type="checkbox"/> Other Registrations as necessary |

### FINANCIAL INFORMATION

- |                                                         |                                                  |
|---------------------------------------------------------|--------------------------------------------------|
| <input type="checkbox"/> Detailed Organizational Budget | <input type="checkbox"/> Program/Project Budgets |
| <input type="checkbox"/> Financial Statement (recent)   | <input type="checkbox"/> Sources of Funding      |
| <input type="checkbox"/> Most Recent Audit              | <input type="checkbox"/> Other/Notes             |

# Grant Readiness Assessment

## part 2

### GOVERNANCE

- |                                                                                            |                                                                        |
|--------------------------------------------------------------------------------------------|------------------------------------------------------------------------|
| <input type="checkbox"/> Board of Directors (including affiliations & contact information) | <input type="checkbox"/> Articles of Incorporation                     |
| <input type="checkbox"/> Organizational Chart                                              | <input type="checkbox"/> Executive Director/President/CEO Bio          |
| <input type="checkbox"/> Current Strategic Plan                                            | <input type="checkbox"/> Executive Director/President/CEO Compensation |

### PROGRAM/PROJECT INFORMATION

- |                                                               |                                                         |                                                          |
|---------------------------------------------------------------|---------------------------------------------------------|----------------------------------------------------------|
| <input type="checkbox"/> Detailed Program/Project Description | <input type="checkbox"/> Target Population              | <input type="checkbox"/> Staffing Structure/Org Chart(s) |
| <input type="checkbox"/> Year Established                     | <input type="checkbox"/> Number Served in Previous Year | <input type="checkbox"/> Job Descriptions                |
| <input type="checkbox"/> Location Address                     | <input type="checkbox"/> Current Outcome Measures       | <input type="checkbox"/> Resumes/Bios of Key Staff       |
| <input type="checkbox"/> Contact Information                  | <input type="checkbox"/> Outcomes from Previous Year    | <input type="checkbox"/> Success Story                   |

### OTHER DOCUMENTATION

- |                                                       |                                                                |                                                                                          |
|-------------------------------------------------------|----------------------------------------------------------------|------------------------------------------------------------------------------------------|
| <input type="checkbox"/> Corporate Compliance Plan    | <input type="checkbox"/> Letters of Support                    | <input type="checkbox"/> Solicitation License (where applicable)                         |
| <input type="checkbox"/> Performance Improvement Plan | <input type="checkbox"/> Collaborating Partners                | <input type="checkbox"/> Articles of Incorporation & By-Laws, including year established |
| <input type="checkbox"/> Policies/Procedures          | <input type="checkbox"/> Contracts                             |                                                                                          |
| <input type="checkbox"/> Best Practices Utilized      | <input type="checkbox"/> % of Board Giving Financially         |                                                                                          |
| <input type="checkbox"/> MOAs/MOUs                    | <input type="checkbox"/> History of grants received and denied |                                                                                          |

# Grant Readiness Assessment Link



[fundingforgood.org/grantreadiness](https://fundingforgood.org/grantreadiness)



[www.fundingforgood.org](https://www.fundingforgood.org)



# Basic Proposal Elements



- 1 Executive Summary
- 2 Organizational Information
- 3 Statement of Need
- 4 Project Description
- 5 Evaluation Methods
- 6 Sustainability Plan
- 7 Budget



# An Executive Summary Provides:

- Description of the problem
- A few key descriptors of the program or project
- Description of what makes your program /project/organization extraordinary
- States how your program/project/organization is uniquely positioned

Coherent + Summary +  
Persuasive/ Engaging =  
Complete Executive Summary



# Sample Executive Summary

Dear Potential Donor,

## Description Organization & Unique Position

Catawba County Hispanic Ministry provides a Christian response to critical needs of Latinos in the Catawba Valley and seeks to bridge the cultural gap between Spanish and non-Spanish speaking members of our community through education, advocacy and outreach programs. We are writing to request \$20,000 as salary support for tutors of our Abriendo Puertas (AP) program. AP is currently the only after-school program in the county that exists specifically to serve the 1,150 Hispanic students enrolled in our schools.

## Key Descriptors

AP was designed in November 2004 to help students & families bridge the social & cultural barriers that can have a negative impact on students' academic achievement. Since its inception, the program has expanded from 3 to 175 students. Due to increased enrollment, we have a need for additional tutors but lack funding to provide them. AP strives to meet the academic, social, & cultural needs of Hispanic families in our community through tutoring, cultural enrichment activities, team building & leadership events, & a focus on the prevention of risky behavior such as drugs, alcohol, violence, & teen pregnancy.

## What Make the Program Extraordinary

Last year, elementary students in AP achieved an average increase of 10.53 points in reading skills & 8.35 points in math skills among students tracked. In 2004-2005, only 68% of the county's schools met the Adequate Yearly Progress Requirements. School officials believe the significant increase in Hispanic students with limited English proficiency played a major role in the county's low test scores because state tests were designed based on the assumption of semi-fluency in the English language. As AP enrollment continues to grow, please consider assisting us so we may hire additional tutors to serve more students effectively.

# Organizational Information



- Official name of the organization
- Brief history of the organization
- Collaborations and partnerships
- Major programs / Primary activities
- Mission / Vision
- Awards / Accreditations
- Number and capacity of staff



# Questions to Consider

- How will you introduce yourself?
- Your organization?
- What are you going to do?
- Why does it need to be done?
- Who is going to benefit?
- How are you going to do it?
- How much will it cost?
- Where and when will the program/project take place?
- Who is going to do the work?
- What are their credentials?
- What are the program and/or organization credentials?



# Building Blocks of a Statement of Need



Why



Who



Data & Statistics







# Sample Statement of Need

As director of the Catawba County Hispanic Ministries (Centro Latino), I had the privilege of designing and implementing an after-school program for at-risk Hispanic students with the support of a \$12,000 grant from The Smith Foundation in 2004. Please accept this proposal from Centro Latino to fund a continuation of Abriendo Puertas (AP), an after-school program for at-risk Hispanic students in our community. This proposal represents a collaborative effort of community partners such as Lenoir-Rhyne University, Catawba County Dept. of Social Services, Hickory Police Department, Young People of Integrity and YMCA to offer academic and personal mentoring for 120 Hispanic students grades K-12.

AP was originally implemented to assist Latino students with homework assignments and offer them support throughout their educational endeavors. Since its inception in 2004, the program expanded from 3 to approximately 120 students. We have been striving to meet the academic, social, and cultural needs of Hispanic families in our community through tutoring, cultural enrichment activities, teambuilding and leadership events, and a strong focus on prevention of risky behavior such as drugs, alcohol, violence, and teen pregnancy.

Recently, members of our community and law enforcers have been coming together to combat an influx of gang activity. Within the last two weeks, we have had 3 Hispanic families come to our program seeking help for their young teenagers who stumbled into their home drugged up and beat up after a night of partying and gang initiation. These parents depend on our program because not only do we understand their culture, their struggles, and their fears, we are also able to effectively link them to community resources so that their children can receive the support they so desperately need. Should the AP program receive funding, our community partners are committed to helping us offer these young people the services they need in order to succeed.

Last year, we received a \$10,000 grant and were able to attract our first group of high-school students to the program. To continue this important program and increase community awareness and support of AP, additional funding of \$8,000 is needed. We thank you for the opportunity to apply for these funds. We eagerly await the reassurance that we will be able to partner with you once again to provide services to Latino youth in Catawba County. Should you have any additional questions, please feel free to call me at (828) 555-5555.

# Project Description



What is going to be done?

In what order do tasks need to be completed?

How much time will it take?

What resources will be required?

Timeline

Sustainability



# Sample Project Description

Friendship Trays Garden: A plot to thicken community. | Slow Food Charlotte | Charlotte, NC

The Idea | Convert a donated urban lot, burdened with brambles and poison ivy, into a year-round garden to supplement fresh food to our local meals-on-wheels provider, serve as an education garden for the adjoining culinary school which cooks those meals, and offer it as a demonstration garden for urban gardening workshops and school field trips.

Who Benefits | The Community Culinary School educates people who experience barriers to employment. The school will tend the garden and add it to their curriculum. The garden's bounty will supplement meals sent to low-income families, the elderly, and the homebound and ailing. The garden will be a classroom for children of all ages.

Objective | The Friendship Trays Garden will connect the crossing missions of multiple communities through the garden. The garden will produce, educate, demonstrate & offer a spot for the rare crop repose. The measure of the garden will be the hands that tend it, the mouths it feeds and the community it fosters.

Time Frame | Jan-June

Budget | \$24,000



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# Content Without Context Is Meaningless



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helping organizations grow for good

# S.M.A.R.T. Goals & Objectives

S

Specific

M

Measurable

A

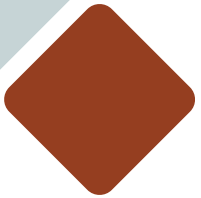
Attainable

R

Realistic or Relevant

T

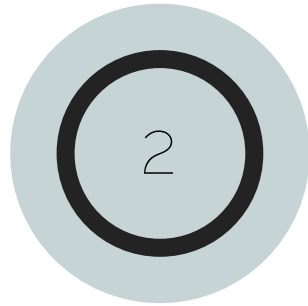
Timely



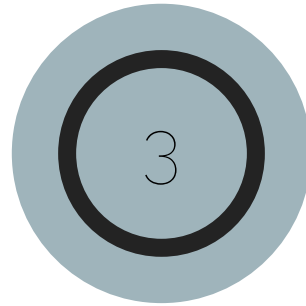
# Goals & Objectives



Objectives state what you are going to do to accomplish your goal/s.



Both Goals & Objectives should be stated in action terms: increase, decrease, etc.



Define the population to be served.



Make goals and objectives measurable.



Include a timeline.







## Generic Goals

We want to serve more animals with our low cost spay/neuter program.

## S.M.A.R.T. Goals

We want to serve 8% more cats and dogs in Jones County with our low cost spay/neuter program during FY [xxxx].





## Generic Objectives

- We will advertise our low cost spay/neuter program
- We will do community outreach events
- We will do community educational programs/events



## S.M.A.R.T. Objectives

- We will work with local media to begin a radio/newspaper campaign in Aug. [xxxx] for a minimum of 6 months for our low-cost S/N program
- We will hold 1 community outreach event quarterly, beginning in Summer [xxxx] to help bring awareness to our low-cost S/N program. Each event will be held in a separate section of the county to increase exposure.
- We will participate in a minimum of 6 community educational events annually to help educate, inform and empower the community on our programming beginning in Sept. [xxxx].



# Budget | remember

A well-prepared budget justifies all expenses and is consistent with the project description.



# Developing Your Budget

## Basic components / parameters to consider:

- Duration
- How much you are asking the donor to support
- Level of resource commitment from your organization
- Number, identity, level of commitment of collaborating organizations
- Detail commitments of partners
- Be generally specific
- Create reasonable forecasts/anticipate change
- Be consistent



# Evaluation

criteria for evaluating the success of your project



How?



When?



By whom?

These questions should be fleshed out when the project/program concept is initially conceptualized.



# Evaluation Methods



## Tests

- Pre and Post Tests
- Performance against control group



## Financial Reports

- Cost to Budget
- Cost per unit of service
- On time on budget



## Data Collection

- Surveys
- Questionnaires
- Interviews
- Checklists
- Feedback forms



## Participation

- Attendance
- Completion
- Certificates
- Follow-on tracking



## Performance

- Grades
- Graduation
- Drop in recidivism
- Job placement
- Permits, inspections, certificates

\* Subjective | journals, testimonials, observations, photos, etc.



# How to Answer the Sustainability Question

## The wrong answers:

- God will provide.
- We plan to develop alternative funding sources, including foundations, personal donors, and fundraising events.
- Because we are a new organization and just beginning to create a fundraising plan, we are working to diversify our income streams over the next few years.
- We are implementing a special event and the proceeds will benefit this program/project in the next fiscal year.



# Sustainability

## The RIGHT Answers



### Right Answer #1

We have a long-standing commitment to the planning process, as reflected in our current strategic plan, which emphasizes funding and identifies the resources needed to continue our work in the future. A copy of our strategic plan is available upon request



### Right Answer #2

We have a designated staff person responsible for raising these resources, and they have a successful ##-year track record of doing so. (Cite some indicator(s) of their success)



### Right Answer #3

As the leadership of our organization, our BOD has an explicit and committed role as both fundraisers and donors, as stated in their description of responsibilities, which they all individually honor. Our Board of Directors Pledge is available upon request.



### Right Answer #4

We have a track record of successful fundraising events, appeal letters, personal donations, and other initiatives for cultivating resources. \*Give examples



# Sustainability

## The RIGHT Answers continued



### Right Answer #5

We have a successful track record of managing projects of similar scope. \*Give examples



### Right Answer #6

We have established relationships with other community partners, service providers, volunteers, funders, and other stakeholders who are committed to working with us to achieve our mutual missions through this project. \*Give examples



### Right Answer #7

We have an Operating Reserve that covers at least three months of operating expenses, and a policy that governs how our reserves can and cannot be used. Our Operating Reserve policy is available upon request.



### Right Answer #8

Our grant writer and Board of Directors have received training from [insert organization you have partnered with for training] on how to cultivate sustainable funding and other resources using proven, replicable strategies. \*Insert any organization where you are receiving development training that is relevant.





Strengths



Weakness



Opportunities



Threats

# SWOT Analysis

# Questions to ask when completing a SWOT analysis for your organization or program

- Will your proposal solve (or address) any of the weaknesses or threats facing your organization?
- Will your proposal bring to fruition any of the opportunities listed?
- Will your proposal give your organization a competitive advantage or build upon its existing strengths?





Q & A

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# Funding For Good

Owner, Mandy Pearce (*left*)  
Lead Consultant, Marie Palacios (*right*)

Strategic Planning • Development & Business  
Coaching • Board Development & Education •  
Fundraising Planning & Strategy



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