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ABCs of Grant Writing

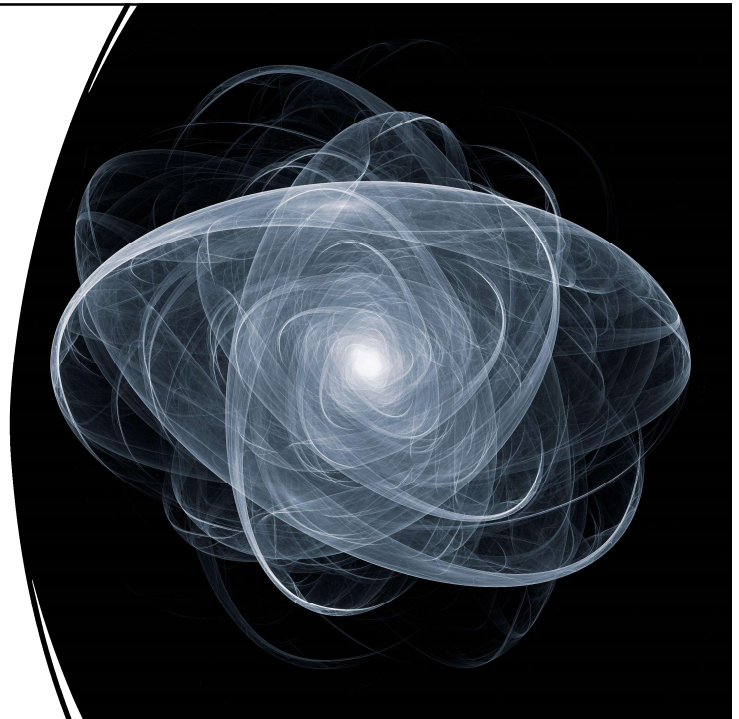
Curry Community Public Library – April 19, 2023

Coos Bay Public Library – April 26, 2023

presented by Anne Donnelly – Grant Planning Consultant

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Core Concepts & Terms



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Core Concepts & Terms



- It's kinda like "Shark Tank"...



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Core Concepts & Terms

- Foundations identify needs they intend to serve, where, through which mechanisms
- Why is your project especially likely to serve those needs?



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Core Concepts & Terms

A grant application is a “pitch” from your nonprofit board:

- We deliver
- Our project is effective and serves a mutual goal
- Here’s what we’ll do, if you help with \$\$



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Core Concepts & Terms

CAN YOU DELIVER?

What grantors need to see:

- Responsible financial management
- History of accomplishment
- Efficient focus on mission
- Long term game plan



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Core Concepts & Terms

BOARD'S PERFORMANCE IS KEY

“But whatever the other reasons for [board] service, the **principal role of the board member is stewardship**. The directors of the corporation are **ultimately responsible for the management** of the affairs of the charity.”

*“A Guide to Nonprofit Board Service in Oregon”
(Free online or from Attorney General’s office)*



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Core Concepts & Terms

Board “resume” (typically required as part of any application):



Mission statement —→ *clarity, focus, consistency with grantor purpose*



Annual budget (*one/1+ years*) —→ *board’s cash management understanding & prudence*

Actual \$\$ in/out —→ *board’s oversight, organization’s viability*



Board/staff members —→ *diverse skills, affiliations, perspectives (“EDI”)*



Strategic plan (*if any*) —→ *ability to govern own performance & direct staff;
ensure current activities advance long-term goals*

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Core Concepts & Terms

“Project”:

- Specific benefit
- To a specific population*
- By a specific end date (1 year)

(* other than your organization;
you're just the middleperson)



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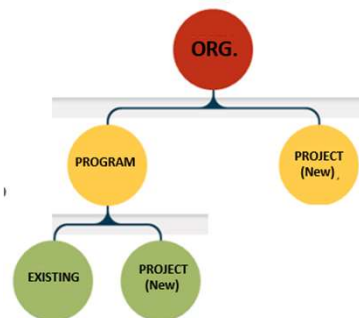


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Core Concepts & Terms

“Program”:

- A service strategy that advances your mission
- May have several components
- A project may
 - Expand a program
 - Start a new program
 - Improve service capacity



Examples? Questions?

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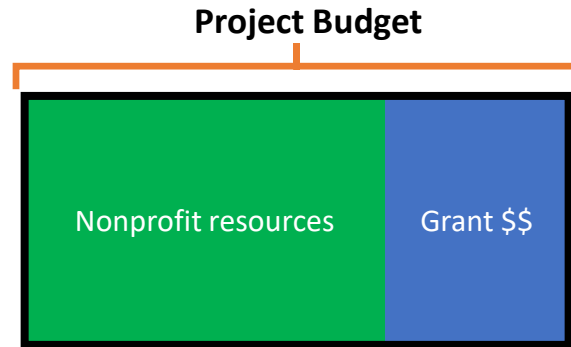


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Core Concepts & Terms

“Project Budget”:

- Every action and every cost to accomplish your purpose within the grant period



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Project Budgets

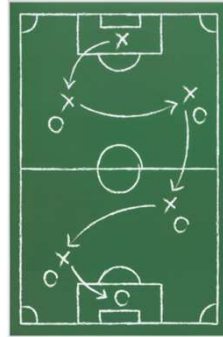


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Developing Your Project Budget

Start with ideal scale. Think big.

- Doable within grant period? (*typically 1 year*)
 - If not, what subset could be completed
- ~ AND ~
- Provide benefit *even if nothing more happens?*



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Developing Your Project Budget

Internal value:

- Identify real cost
- Identify potential alternatives
- Develop contingency plan

Application value:

- Identify most likely grantors
(*focus, minimum grant requirements*)
- Develop complete & accurate budget
- Create framework for all narrative



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Developing Your Project Budget - Example

Project goal:

- Build skills, teamwork, sense of accomplishment among young teens

Project:

- Teach teens to build treehouses from plans



Budget **TREEHOUSE**

2X4s
Nails
Rope ladder
Plans

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Developing Your Project Budget - Example

Reality check!

- Imagine actual implementation
- Second pair of eyes
- Someone with relevant experience



Budget **TREEHOUSE**

2X4s
Nails
Rope ladders
Plans
hammers
saws
screws
crew leader
proj. coord.
drills
8x10s
ext. ladder
insurance
tree climber
calculators
meas. tapes
pencils
safety glasses
gloves
refreshments

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Developing Your Project Budget

Organize by type of expense:

- “Materials” = used up by project
- “Equipment” = usable post-project
- “Contracted services” = hired out
- “Staff” = % of person’s time/position cost dedicated to project
 - List volunteer tasks separately

SORTING OBJECTS

Instructions: Choose the correct answer.

1. Which shape can **ROLL**?

2. Which shape can **STACK**?

3. Which shape can **SLIDE**?



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Developing Your Project Budget - Example

Expenses by category:

TREEHOUSE PROJECT	
Materials	2x4s nails screws rope ladder shingles
Equipment	hammer drill ext. ladder
Staff	crew leader
Contracted	tree climber first aid training



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Developing Your Project Budget – Activity!



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Developing Your Project Budget - Activity

Just the yellow boxes.

Pick simple numbers with scalable format where possible.

- “Materials” = used up by project
- “Equipment” = usable post-project
- “Contracted services” = hired out
- “Staff” = % of person’s time/position cost dedicated to project
 - List volunteer tasks separately

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Developing Your Project Budget

Have you identified...

- Specific adverse impact(s)
- On whom*
- That the project will reduce, avert, or eliminate?

** Adverse impact on a group you serve, not on your organization*



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Developing Your Project Budget

Does project address harm/risk:

- Effectively?
- Efficiently?
- Cost-effectively?
 - Duration
 - Catalytic



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Tackling an Application



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Tackling an Application

Components of an application package appear in the order that facilitates review...

Do not try to write in that order!



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Tackling an Application

Recommended work sequence:

- Refined draft project budget
(but it's still not final)
- Narrative questions
- “Organizational resume” attachments
(anytime)
- Executive summary
(if required)



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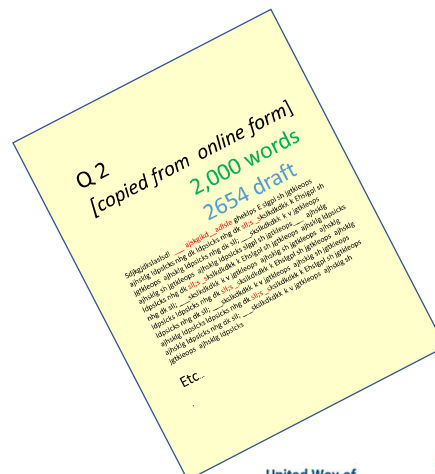


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Tackling an Application

Work offline:

- Make your own Excel budget sheet
- Copy narrative questions to Word document
(or similar editor, e.g. Google docs if collaborating)
 - New page for each question
 - Include word/character limit per question
 - Leave all #s and \$ blank, in RED!
*(We will **serve** ___ **meals**.)*



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Tackling an Application – Narrative Questions

Narrative question structure

- Concepts compartmentalized for review
- Each question has a different focus *(and possibly reviewer)*
 - Why trust your organization with funding?
 - Why act?
 - What action/how?
 - Why that choice?
 - Why your organization?
 - Post-project evaluation measures?
- Do not try to write question-by-question



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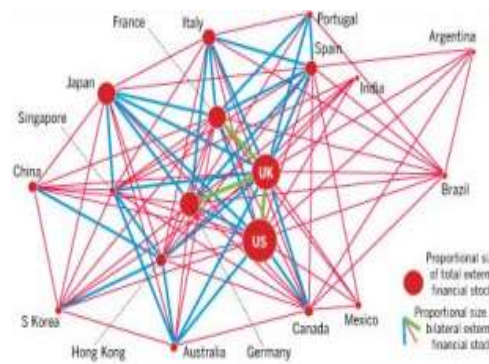
Tackling an Application – Narrative Questions

How we think:

- Multi-dimensionally
- Highly integrated
- All implications of one face
- Conflate causes/consequences

How we tend to communicate:

- Journey through my thought process!
- Here's a fact, another fact, another fact...
- And here's what that all signifies...



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Tackling an Application – Narrative Questions

Use your natural thought process!

Capture everything you think matters –
then sort, clean house:

- Free associate/brain dump for each question
- Build “inventory” of facts and details
- Red blanks for budget numbers
(and possibly other data)
- Don’t try to edit during first writing



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Tackling an Application- Narrative Questions

Address **funder’s** interests/potential concerns

Be specific: why this proposed use of \$\$?

- Meets funder purpose & goals
- Defensible, prudent
- High probability of high ROI
- ROI continues post-grant

Why this is an excellent investment opportunity now

- Question is not “fund/not fund,” it’s “fund *which?*”



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Tackling an Application- Narrative Questions

“Stand alone” response per question

- Responses often scored in isolation
- For each question: what is grantor trying to assess?
- Include every fact pertinent to that purpose
- One fact may be relevant to 2+ questions



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Tackling an Application- Narrative Questions

“Describe your organization’s mission and history”

- Facts specifically requested
- Facts that inspire confidence
 - Businesslike organization
 - Recent major and/or relevant accomplishments
 - Anything that suggests ability to do this project
 - Adaptation during COVID?
 - Resilience after past problems?



“Tell us a little bit about yourself...”

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Tackling an Application- Narrative Questions

“Describe the need for your project”*

“What need does your project address?”*

- Question is just “why is any action needed?”
- Whos’ hurting, how, why, to what extent?
- Show your grasp of cause(s), consequence(s)
- Predicate for “Project Description” question

* Not “what’s your project/solution” – just “what’s the problem, for whom, why?”



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Tackling an Application- Narrative Questions

What’s the “need” here?

(Assume the rope is a safety measure!)

Examples? Questions?



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Tackling an Application- Narrative Questions

“Describe your project”

Ideal: touch these points in first sentence:

- The action you’ll take, with what measurable result, by end of grant
- Who will benefit?
- How they will benefit?
- Why this solution?
(sufficient, cost-effective, catalytic)
- Why you?



“Construct low-maintenance concrete/steel pedestrian bridge above River R flood level, enabling safe foot traffic year-round between A & B villages, similar to our 2010 bridge serving C & D villages.”

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Tackling an Application- Narrative Questions

“Why is your organization undertaking this project [now]?”

Fit:

- Need urgent; fits our mission & goals
- Extends something we do now
- Builds toward something we plan

[Superior] Capacity:

- We’re the only people doing this
- We have [the most] experience [locally]
- We have needed community links/support



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Tackling an Application – Narrative Questions

“Identify metrics”

- How will you know if the project “worked”?
 - If good evidence shows it reduced the harm (need) you identified
(e.g. change in #s – users, deaths, scores, etc)
- What evidence will you use? Why?
 - Reliable, directly measures impact, clear causal relationship
- How/who will collect that evidence?
- Add cost of “before/after” measurement to budget



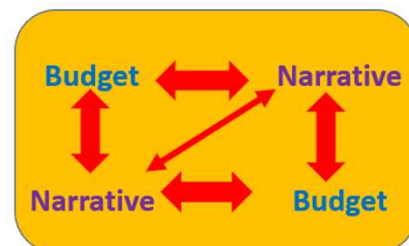
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Tackling an Application – Final Review

- Finalize draft budget to include anything added in narrative
- Fill in red \$ blanks (and any other data) in narrative
- Check for consistency of information throughout
- Have a second pair of eyes review
(ideally someone unfamiliar with the project)



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Tackling an Application – Final Review

- All answers pasted in correct location
- All required items
 - Required format
 - Required sequence
- All facts consistent throughout
- All numbers consistent throughout



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Tackling an Application

Your mindset:

“We’re going to do this. Want in?”

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Finding the Right Grantor(s)

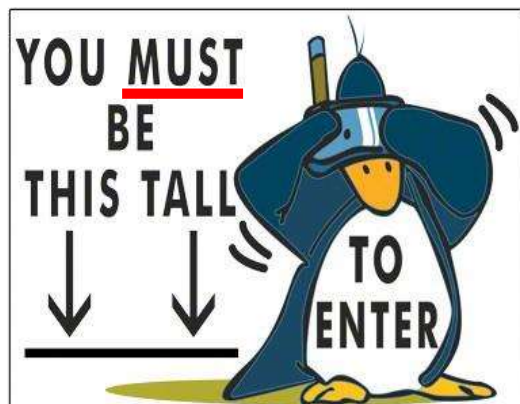


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Finding the Right Grantor(s)

Eligibility is non-negotiable

- Each grantor announces criteria
- Ensures fair, consistent process; legality (IRS); best use of time
- **Eligibility = viability**



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Finding the Right Grantor(s)

Eligibility on foundation websites:

- “Mission”
- “Values”
- “Eligibility”
- “Guidelines”

Grantors *want* to inform you!



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Finding the Right Grantor(s)

Additional common criteria:

Your organization

- Legal status - 501(c)3? fiscal sponsor?
- Mission, general target population, type of service, location
- Total annual operating budget (minimum/maximum)

Amount requested *(why you need a draft budget!)*

- Minimum and/or maximum amount; set amount
- Grant amount as % of your annual budget
- Grant amount as % of total project budget



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Finding the Right Grantor(s)

“Eligible project” criteria

- Type of project
- Purpose – immediate and long-term
- Specific beneficiaries
- Specific formats/activities
- Start/end dates



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Finding the Right Grantor(s)

“Project objective” criteria

- Program: directly advances mission/services
- Capacity-building: improves operating ability
- Operations (routine management expenses, corporate obligations)

Always check for grantor’s definitions; some vary a bit.

Some grantors have specific/different application forms for each.

THE PIE ALIGNMENT CHART			
With apologies to @mattonic	INGREDIENT PURIST Filling must be savoury	INGREDIENT NEUTRAL Filling can be sweet or savoury	INGREDIENT REBEL Filling can be any food
STRUCTURE PURIST A pie must be enclosed by pastry on all sides	LAWFUL GOOD  A meat pie is a pie.	LAWFUL NEUTRAL  Apple pie is a pie.	LAWFUL EVIL  A pop-tart is a pie.
STRUCTURE NEUTRAL A pie must be enclosed, but not necessarily by pastry	NEUTRAL GOOD  Shepherd's pie is a pie.	TRUE NEUTRAL  Lemon meringue pie is a pie.	NEUTRAL EVIL  Tortellini is a pie.
STRUCTURE REBEL A pie is a filling in an edible container	CHAOTIC GOOD  Deep dish pizza is a pie.	CHAOTIC NEUTRAL  Pumpkin pie is a pie.	CHAOTIC EVIL  Soup in a bread bowl is a pie.

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Finding the Right Grantor(s)

“Use of grant funds” criteria

- Equipment
- Materials
- Payroll (dedicated to project)
- Services

Draft budget lets you evaluate options



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Finding the Right Grantor(s)

Check grantor website for more clues

- “We don’t fund...”
- “Preference is given to...”
- “Tips for grantseekers”
- “Past grantees”
- “Success stories”

And sometimes

- News stories online
“[grantor/program] + award + recipient”



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Let's Apply!



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Additional Resources

- United Way of Southwestern Oregon
 - Grant opportunity resource list – <https://unitedwayswo.org/grant-services>
 - Capacity building training sponsorships/scholarships (small \$) – <https://unitedwayswo.org/capacity>
- The Ford Family Foundation
 - Technical Assistance capacity building grants (up to \$5K) – <https://www.tfff.org/how-we-fund/grants/technical-assistance-grants>
 - Oregon by the Numbers – <https://www.tfff.org/resources/research-and-publications>
 - Select Books - <https://selectbooks.org/>

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Additional Resources

- Oregon Nonprofit Corporation Handbook (Cynthia Cumfer, Kay Sohl)
 - New 6th edition (most recent Oregon law), due in 2023. Some chapters & recent updates are downloadable now at <https://nonprofitpublications.net/products/oregon-nonprofit-corporation-handbooknonprofit> (scroll to bottom of screen)
- Guide to Nonprofit Board Service in Oregon
 - <https://www.doj.state.or.us/wp-content/uploads/2017/03/guide-nonprofit-board-service.pdf>
- NPO resource library from Nonprofit Association of Oregon
 - <https://nonprofitoregon.org/nao-nonprofit-resource-library>

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