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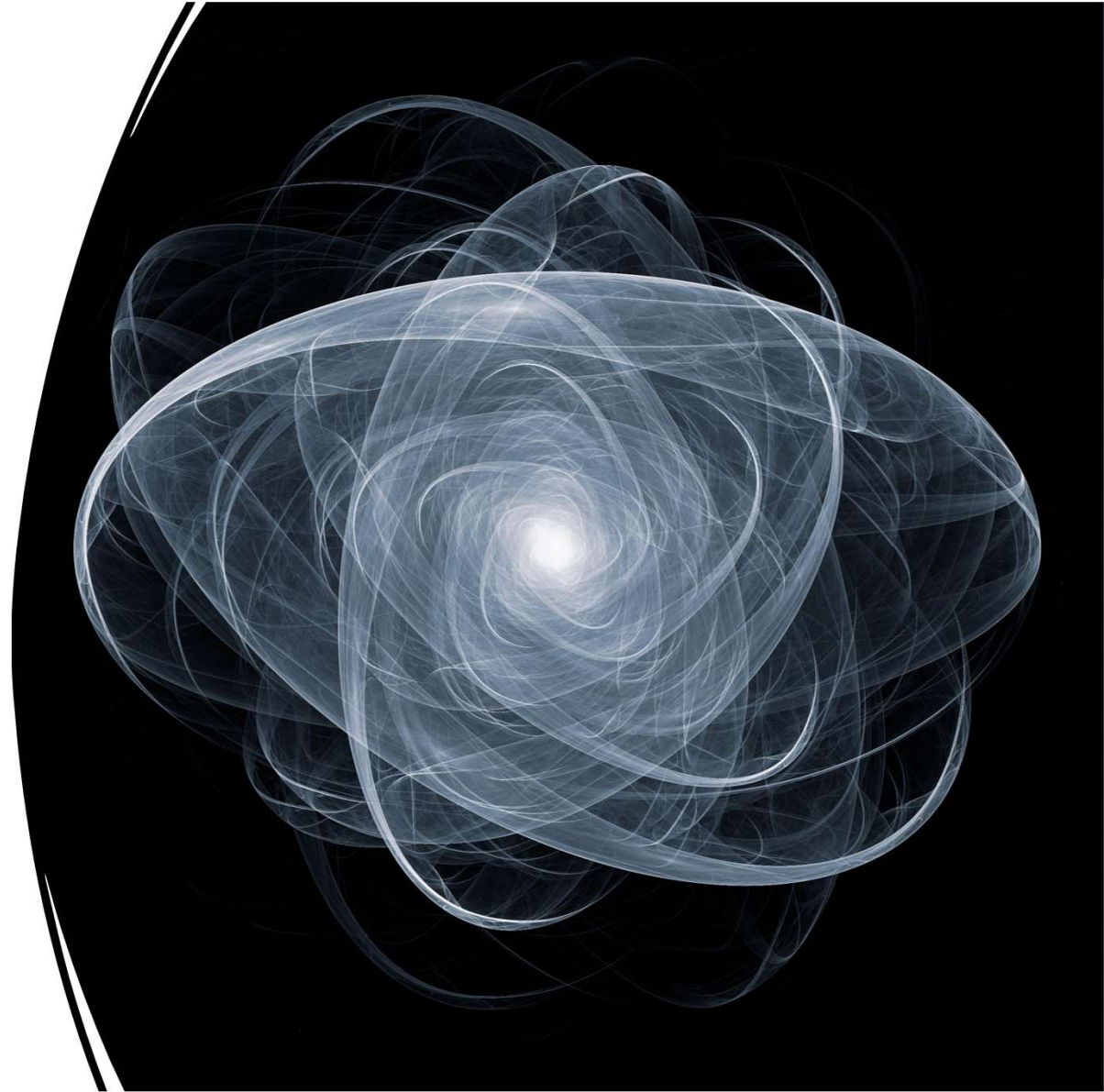
# Grant Writing “101”

The Barn Community Center, Bandon – November 1, 2023

Anne Donnelly – Grant Planning Consultant

# Core Concepts & Terms

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# Core Concepts & Terms



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



# Core Concepts & Terms

- Foundations identify needs *they* intend to serve, where, through which mechanisms
- Explain why your project is 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 clear mission
- Long-term game plan



# 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)*



# Core Concepts & Terms

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



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



Annual budget (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*



# Core Concepts & Terms

## “Project”:

- Defined action or set of actions
- Results in specific benefit
- To a specific population\*
- By a specific end date (usually 1 year)

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



# Core Concepts and Terms

A “project” averts, reduces, or eliminates a condition that

- Demonstrably exists (or is imminent)
- Adversely affects a defined group\*

*\* Adverse to a group you serve, not to your organization.*



# Core Concepts and Terms

“Project” addresses that condition:

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



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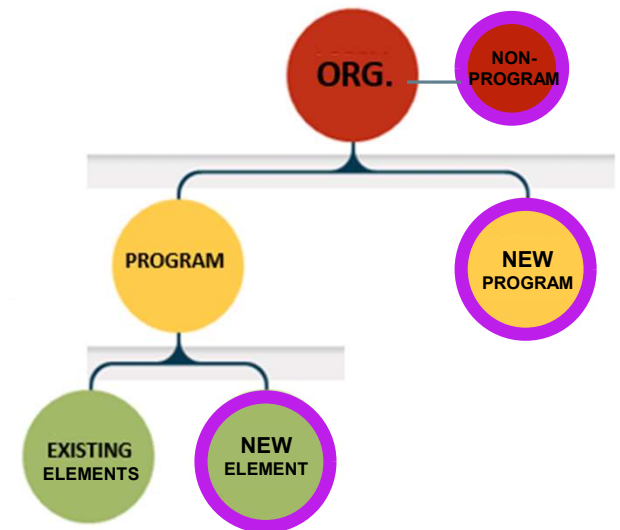
# Core Concepts & Terms

## “Program”:

- Service strategy that advances your mission
- May have several components

## A “project” may

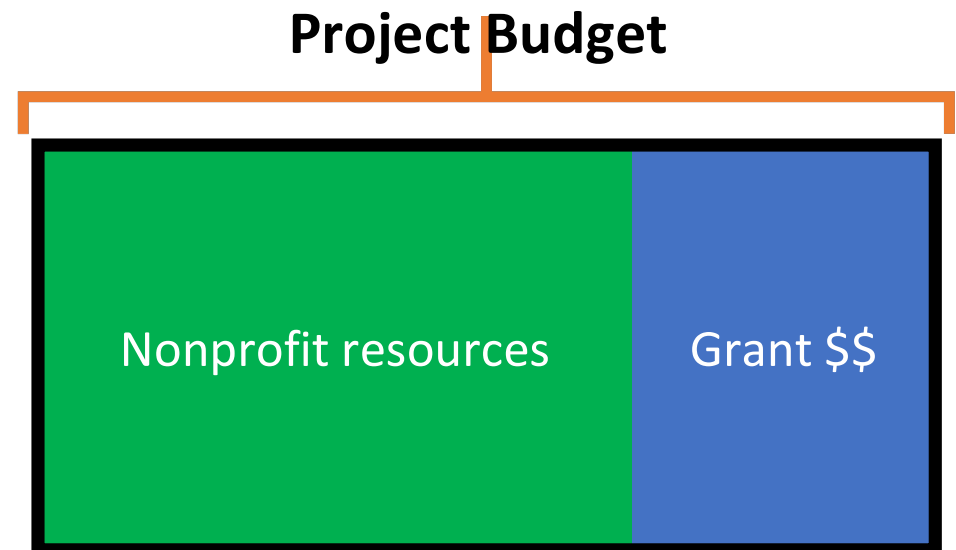
- Expand reach/content of an existing program
- Add a new component to a program
- Start a new program
- Improve overall org capacity (not a “program”)



# Core Concepts & Terms

## “Project Budget”:

- Not just the grant \$
- Every action and every cost
  - Involved in accomplishing your project
  - Within the grant period
  - Regardless of source



# Project Budgets

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# Developing Your Project Budget

## DRAFT BUDGET = DRAFT GAME PLAN

### For your organization:

- Identify all needs & real costs
- Evaluate potential subsets & combos
- Easily adapt to opportunities/circumstances

### For funding:

- Identify most likely grantors  
*(focus, minimum grant requirements)*
- Ensure complete & accurate budget\*
- Provides narrative framework

*\*Funders really really really check project budgets!*



# Developing Your Project Budget

Think BIG. (What's a real solution?)

- Can all be completed within grant period?  
(typically 1 year)
- If not, what piece(s)...
  - Could be done w/in grant period
  - If several, must serve the same specific purpose and
  - Provide benefit *even if nothing more could be done*





# Developing Your Project Budget - Example

## Project purpose:

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

## Project:

- Teach teens to build treehouses from plans



## Budget TREEHOUSE

**2X4s**  
**Nails**  
**Rope ladder**  
**Plans**

# 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

# Developing Your Project Budget

Sort 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**?



# Developing Your Project Budget - Example

Expenses by category:

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

# Developing Your Project Budget

**Let's practice!!**



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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

# Developing Your Project Budget

Check for implicit assumptions!



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# Developing Your Project Budget

Questions?

Other examples to share?



# Tackling an Application

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# Tackling an Application

Components of an application package are organized in a sequence that facilitates review...

***Do not try to write in that order!***



# Tackling an Application

## Recommended work sequence:

- Refined draft project budget  
*(still not final; you'll probably make some tweaks)*
- Narrative questions
- “Organizational resume” attachments  
*(anytime; check for clarity/accuracy)*
- Executive summary  
*(if required)*



# Tackling an Application

## Work offline:

- Budget: make your own Excel work sheet
- Narrative:
  - Copy each narrative question to a Word document (or similar editor, e.g. Google docs if collaborating)
  - New page for each question
  - Show word/character limit per question
  - Keep running tally of actual count
  - DON'T insert any #s yet; leave blanks in RED! (ex.: "We will serve \_\_\_ meals.")

**QUESTION 1**

[exact q from online form]  
2,000 words  
2654 draft

\_\_skslkdskkk k Ehsiglpl sh jgtkleops ajhsklg ldpslcks nhg dk sll;  
\_\_skslkdskkk k v jgtkleops ajhsklg sh jgtkleops ajhsklg  
ldpslcks ldpslcks nhg dk sll;s \_\_skslkdskkk k Ehsiglpl sh jgtkleops  
ajhsklg ldpslcks nhg dk sll; \_\_skslkdskkk k v jgtkleops ajhsklg  
sh jgtkleops ajhsklg ldpslcks ldpslcks nhg dk sll;s \_\_skslkdskkk k  
Ehsiglpl sh jgtkleops ajhsklg ldpslcks nhg dk sll; \_\_skslkdskkk  
k v jgtkleops ajhsklg sh jgtkleops ajhsklg ldpslcks  
Sdjkgjdkslaslsl \_\_ajskglkd \_\_adlsle gheklps E slgpl sh  
jgtkleops ajhsklg ldpslcks nhg dk ldpslcks nhg dk sll;s  
\_\_skslkdskkk k Ehsiglpl sh jgtkleops ajhsklg ldpslcks nhg dk sll;  
\_\_skslkdskkk k v jgtkleops ajhsklg sh jgtkleops ajhsklg  
ldpslcks slgpl sh jgtkleops \_\_ajhsklg ldpslcks nhg dk sll;s  
\_\_skslkdskkk k Ehsiglpl sh jgtkleops ajhsklg ldpslcks nhg dk sll;  
\_\_skslkdskkk k v jgtkleops ajhsklg sh jgtkleops ajhsklg  
ldpslcks ldpslcks nhg dk sll;s \_\_skslkdskkk k Ehsiglpl sh jgtkleops  
ajhsklg ldpslcks nhg dk sll; \_\_skslkdskkk k v jgtkleops ajhsklg  
sh jgtkleops ajhsklg ldpslcks ldpslcks nhg dk sll;s \_\_skslkdskkk k  
Ehsiglpl sh jgtkleops ajhsklg ldpslcks nhg dk sll; \_\_skslkdskkk  
k v jgtkleops ajhsklg sh jgtkleops ajhsklg ldpslcks

**QUESTION 2**

[m]

sl;  
sl;  
ops  
sklg  
kk k  
dkk  
sl;  
sl;  
ops  
sklg  
kk k  
dkk

# Tackling an Application – Narrative Questions

## Narrative question structure

- Concepts compartmentalized for review
- Each question = different evaluation criterion  
(*& possibly different reviewer*)

*e.g.*

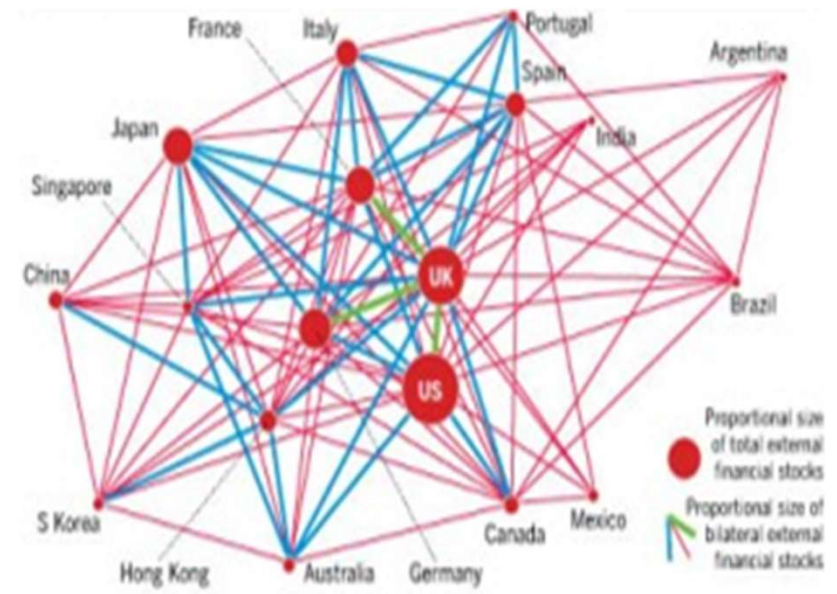
- Can we responsibly entrust \$\$ to your organization?
- Is action needed?
- What action/how?
- Why that action? why now?
- Why should your org. be the actor?
- How will we know if it worked?



# Tackling an Application – Narrative Questions

How we think (good!)

- Multi-dimensionally
- Cross-integration
- Different implications of one fact
- Conflate causes/consequences
- Unique to each individual



# Tackling an Application – Narrative Questions

To communicate effectively:

- Address what matters to your audience
- Start with core concept/conclusion
- Provide the facts your audience needs...
- And nothing else

Be kind to the reviewer!

~~Mystery writing~~

~~“Wikipedia article”~~

~~“Fact, fact, fact, fact therefore x”~~



# Tackling an Application – Narrative Questions

Try this:

- Capitalize on natural thought process  
Free associate/brain dump loosely for each question
- Capture any fact that seems to matter  
Overabundance of possibly relevant facts and details

Then

- Allocate for relevance
- Delete what doesn't matter for grantor's purposes

Remember: keep \$s and quantities as **red blanks** in narrative for now





# Tackling an Application – Narrative Questions

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

Be specific: why your org. & proposed use of \$\$

- Aligns with funder purpose & goals
- Is a defensible, prudent choice
- Offers high probability of high ROI
- Ensures ROI continues post-grant

Why 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 q: what is grantor trying to assess?
- Review your “inventory” for facts specifically relevant to that question
- A fact may have multiple implications
- Restate each time it’s relevant



# Tackling an Application – Narrative Questions

## “Describe your organization’s mission and history”

- Provide all facts specifically requested
- Provide facts that inspire confidence
  - Evidence of responsible stewardship & growth
  - Evidence of growing/sustained community support
  - Recent major and/or relevant accomplishments
  - Anything that indicates ability to do this project
  - Successful adaptation during COVID?
  - Resilience – recovery from some past problem?
- Only what is helpful for grantor’s purposes



*“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?”
- Who’s hurting, how, why, to what extent?
- Show your grasp of cause(s), consequence(s)
- Predicate for “Project Description” question

*Not “what is your project/solution?”*

*Not “why is your particular solution a good idea”*

*– just “what’s the problem, now, for whom, why [how do you know]?”*



# 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

## “Project Description”

*What you’re going to do, & why that choice*

State the big idea in your first sentence:

- The action you’ll take, difference it’ll make, by end of grant
- Who will benefit?
- How will they benefit?

Perhaps hint at... “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 C & D villages’ bridge.”**

# 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



# Tackling an Application – Narrative Questions

## “Identify metrics” or “Define project success”

- **How will you measure project impact?**

At end of grant, what data will you consider to assess if project accomplished the change you intended?

- **Why is that information a reliable indicator of impact?**

- Info as objective as possible
- Data collection method as objective as possible
- Change shown by data can be safely attributed to project, not other factors

- **Use before/after numbers whenever possible**

E.g. how many served, objective outcomes for participants (e.g. grades, employment), fewer injuries, cost savings, etc.)

- **Consider/allow for costs of obtaining/tracking before/after info**





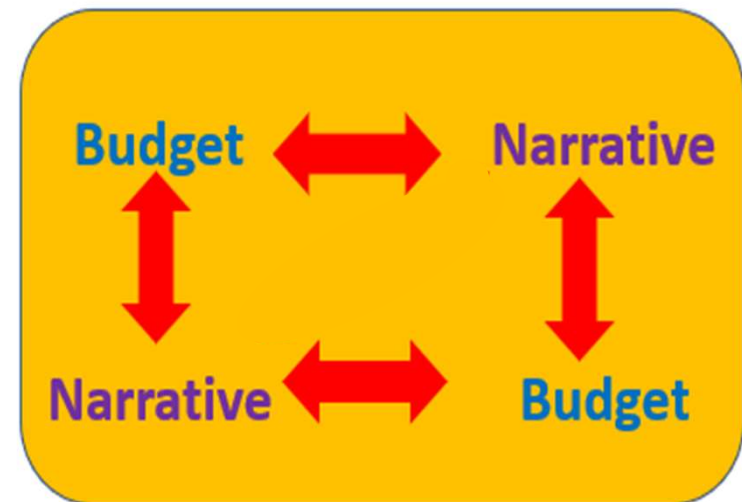
# Tackling an Application – Final Review

- **Budget covers every project need per narrative.**

Check for completeness & accuracy (math!)

- **Narrative explains line items in budget.**

Use final budget to complete blanks in narrative



# Tackling an Application – Final Review

- Consistent terminology, dates & info
- Trusted reader unfamiliar with the project
- Provide hard copy for notes
- BEG for honest feedback!



# 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?”*

# Tackling an Application

Questions?

Other examples to share?

# Finding the Right Grantor(s)

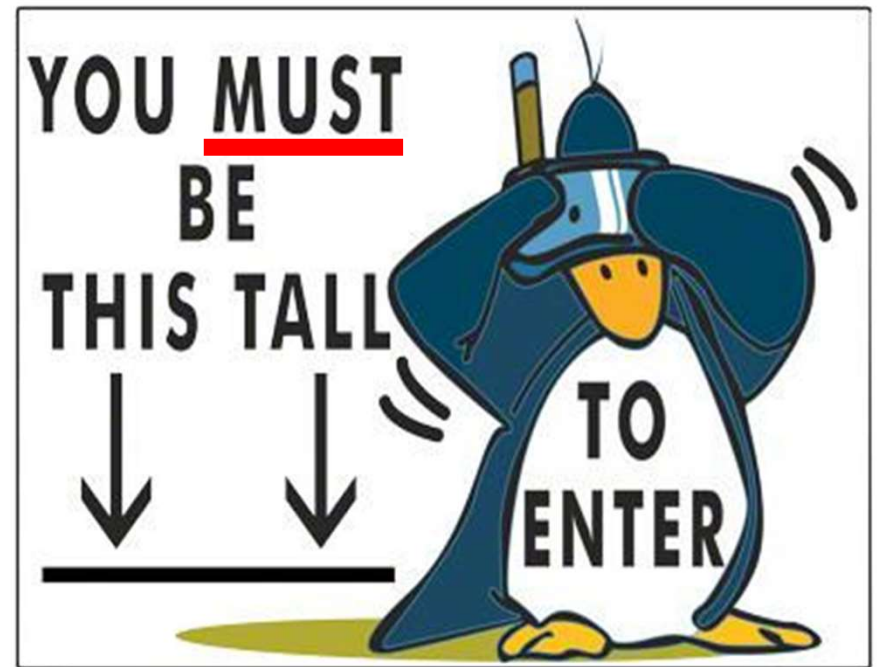
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# Finding the Right Grantor(s)

Eligibility is non-negotiable

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



# Finding the Right Grantor(s)

Eligibility on foundation websites:

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

Grantors *want* to inform you!





# 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



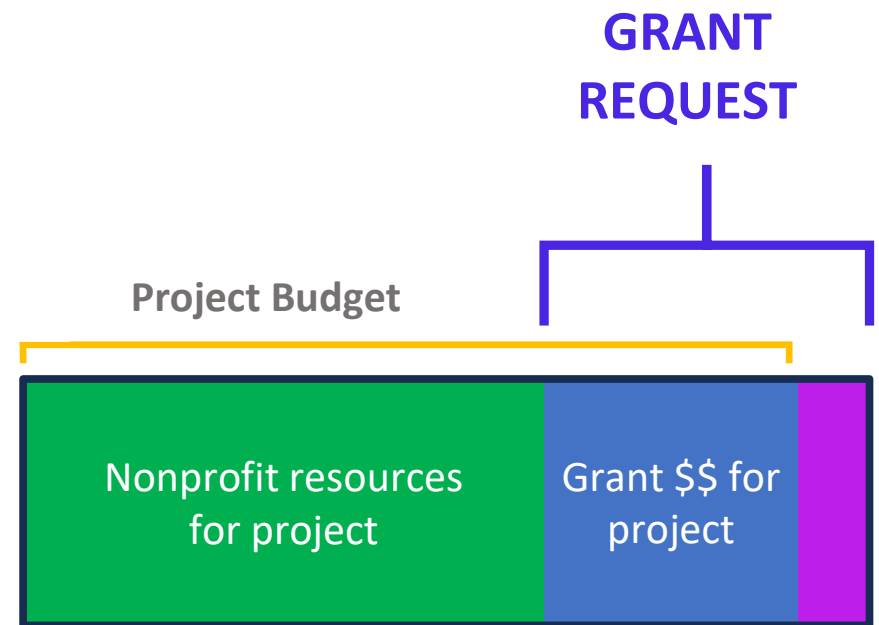
# Finding the Right Grantor(s)

## Including “admin” as part of request

- “Admin” = your assumed grant management expenses
- If allowed, grantor specifies as % of grant \$ for project
- If requested, counts toward max allowed grant

To ensure total request < max allowed:

- Divide “max allowed grant” by “1.allowed percentage”
- Result = max grant for project



# Finding the Right Grantor(s)

## “Eligible project” criteria

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












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

# Finding the Right Grantor(s)

## “Use of grant funds” criteria

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

Draft budget lets you evaluate options



# 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”*



# Finding the Right Grantor(s)

Questions?

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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/>

# 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>