Grant Writing "201"

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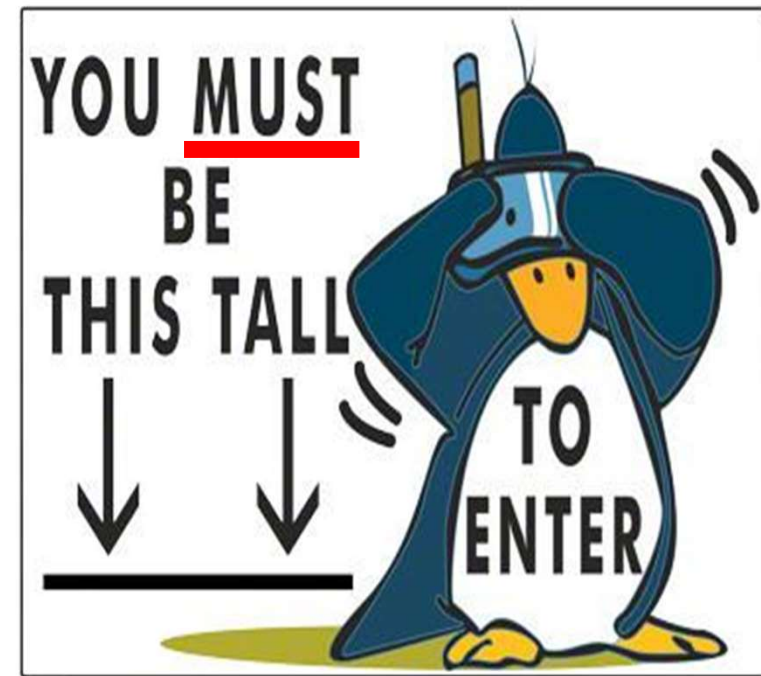# "201" Context Setting

- Primarily intended for individuals with some grant writing experience

    and

- Seekers of…

  - Grants >$15,000 from foundations

      (though highly relevant to government grants as well)

  - Grants for capital projects (construction, major remodels)

  - Grants that last >1 year

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"201" Context Setting

Assumes familiarity with these fundamental concepts…

- How to find/identify potential grantors
- Elements of eligibility
- Standard terminology

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"201" Context Setting

Familiarity continued…

Grantor perspective:
- Engage with this organization?
  - Alignment of interests
  - Evidence of fiscal responsibility
  - Record of achievement

- This project, by this organization?
  - Alignment of focus
  - Cost effectiveness
  - Probability of success

Board & organization

Project

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"201" Context Setting

Familiarity continued…

Annual budget
- Standard line items
- Clear layout

Project budget (working draft)
- Common sense categories
- Significance for grantor

Copies of "Grant Writing 101" presentation are available from UWSWO

Numbers Deep Dive – Metrics

Metrics

Typical application questions:

- "What metrics will you use?"
- "How will you identify measurable outcomes?"
- "How will you know if your project worked?"
- "List key performance metrics."

Metrics

Metric = what you plan to measure/assess at end of grant (and maybe during)

Should measure thing(s) that reveal:
- <u>If</u> change occurred during the project
- In <u>the condition your project addressed</u> AND
- If so, <u>to what extent</u>?

Exponential Growth
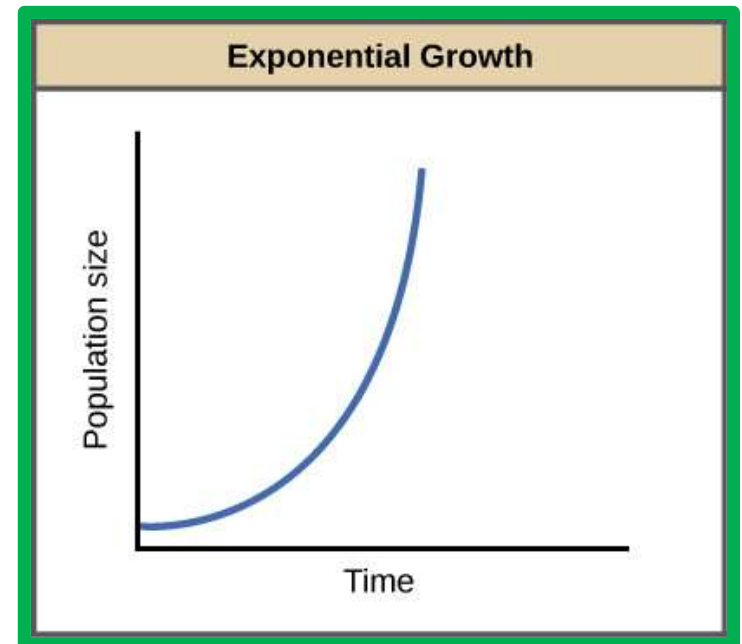
Metrics

Purpose: inform post-project decisions
- Your organization: Continue or expand what we did?
- Foundation: Fund a project like this again?

And/or
- Adjust to improve?
- Repeat with better metrics?

Metrics

Whether & how well the project "worked"

Not…
- That you spent all of the grant money
- How you spent all of the grant money
- What you did during the grant period

Metrics

Meaningful metrics = <u>measurable</u>

Ideally quantitative (numerical), e.g.
- #s served
- % change
- $$ saved

Subjective only if absolutely necessary and defensible

Examples? Questions?

Metrics

Practical considerations

Logistics
- Who will gather data?
- How?
- How often?
- Finish within grantor timeline?

Cost
- Acquiring "before" data using same metric?
- Collecting "after" data?
- Add $$ to budget?

Metrics

Measure change <u>attributable to your project</u>

- Least likely to be affected by other factors/events
- Multiple metrics = reinforce inferred causality

Metrics

Appropriate metric(s) for Electric Honey Extractor?

Metrics

And now, the game that asks you to…

RATE

THAT

METRIC!

Metrics

RATE THAT METRIC!

1. Will this metric assess achievement of the stated purpose?
2. Why/why not?
3. Suggestions for better/additional metric(s)?
4. Thoughts on this project/purpose?

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Metrics

Project	Purpose	Proposed Metric
1. Purchase & use mass email list	Build audience at lower cost	# of messages sent; postage saved (b/a)
2. Purchase a vehicle	Reduce gas & maintenance $	# of deliveries/week, cost/delivery (b/a)
3. Contract for bookkeeping	Free up Executive Director time	Increased donations
4. Paint building	Attract support	News coverage
5. Free math tutoring	Increase math scores	# of kids attending all sessions
6. Purchase refrigerator	Reduce costs w/bulk food	# cubic yard food cold storage increase
7. Community lecture series	More social opportunities for seniors	% participants, exit evaluations
8. Summer STEAM camp	Encourage kids to want STEAM careers	# of kids attending all sessions
9. Book drive	Support adult literacy	# of books collected
10. Make video for website	Reduce domestic violence	# views
11. Public lecture series	Explain US Constitution	Post-lecture quiz, change in voting rates

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Numbers Deep Dive – "In Kind"

In Kind

Something of value (but not $$),

Provided to/through your organization,

To support your work

Common examples

- Services (e.g., hours of volunteers' time)
- Materials
- [Use of] equipment or space

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In Kind

Capture for annual records

- Shows that
  - The community supports you
  - You're connected, resourceful, proactive

- Strengthens operations
  - Expands & diversifies capacity
  - Builds partnerships

- Record any/all received for any reason

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In Kind

Include in annual budget?

- Best shown in separate list, same document

- May show just type & quantity

- Or show cash value…

In Kind

Assigning $ value to donated time

Volunteers, typical tasks
- Taking tickets
- Packing food
- Phones/reception
- Unskilled labor
- Board meetings

Standard hourly rate
- Online: independentsector.org
- Or search "volunteers" + rate value time
- Changes annually

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In Kind

$ value of volunteered professional services

- E.g., legal, design, [highly] skilled labor

Service must…

- Require specialized skill(s)
- Be provided by someone possessing said skill(s)
- Be something you would otherwise have to pay for
- Less common, can be "red flag"

Use that person's normal hourly fee for that service

Important: donor of services may NOT take a tax deduction for value of donated services

Numbers Deep Dive – Project Match

Project Match

Non-grant resources you will use for the project

- Grant is not 100% subsidy
- "We're as resourceful as possible"
- Demonstrates community support for project
- Reduces grant request – more competitive

TOTAL PROJECT BUDGET

"So many people want to help!"

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Project Match

Match may be *required*

- Certain match % = eligibility
- Read grantor instructions

Pay special attention:

- How to calculate required amount
- What "counts" toward requirement

Project Match

Determining required match amount

- Typically "x% of grant $ for project"

- But read grantor instructions!

Match value + grant $ for project = "project budget"

Match	Grant $ for Project		

Required match = % of grant $ for project

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Project Match

Exercise A

1. Requesting $100,000 grant

    Must provide match @ 20% of request = ???

    Total project budget = ???

2. Requesting $27,000 grant

    Must provide match @ 15% of request = ???

    Total project budget = ???

Project Match

Always double check "match as % of what"

Some, especially large grants, specify % of "total project budget"

Very high match (e.g. 75%) for capital projects

PROJECT BUDGET

If required match = 75% of project budget

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Project Match

Exercise B

1. Requesting $100,000 grant
    Match must be 75% of total budget
    Project budget = ???
    Match = ???

2. Requesting $27,000 grant
    Match must be 15% of project budget
    Project budget = ???
    Match = ???

Project Match

What counts as match?

Grantor specifies – may include

- Cash from any source, to be used for project

- $ value of in kind to be used for project
  - Volunteer time
  - Staff time (prorated @ hourly rate)
  - Materials/services from others
  - Materials you have (if significant value)

Project Match

Additional possible constraints:

- How certain when applying?
  - In hand (e.g., your own, $ already donated for project)
  - Pending (applications made, waiting to hear)
  - Planned (applications intended but not yet submitted)
  - Committed (awarded/pledged but not in hand yet)
- When will it be certain, if not now?
  - By time of grant award if any
  - By end of project

Project Match

Darn! Perfect grant, prohibitive match!

Adjust the budget?

- Reduce project scale

- Redefine project as "phase"

- Break into smaller units, each funded by a different grantor

Each of these must confer a benefit even if nothing more is done

Project Match

Getting started - cash only

		My org	Grantor	Totals
Materials				
	posts & concrete		1,200	1,200
	top soil (delivered)	600		600
	sign (design & fabrication)	1,200	1,200	2,400
Services				0
	sign install		700	700
	repave driveway		1,600	1,600
	Total project costs	**1,800**	**4,700**	6,500

But 1:1 match required!!

What can we do?

Project Match

In kind can save the day!

What is project budget?

What is grant request?

How else might you achieve match?

One option: expand scope to add in kind match	My org	Grantor	Totals
Materials			
posts & concrete		1,200	1,200
top soil (delivered)	600		600
sign (design & fabrication)	1,200	1,200	2,400
Services			
sign install		700	700
repave driveway		1,600	1,600
In kind			
plants	800		800
dig & fill planting beds			
70 vol hrs. @ $30/hr	2,100		
Total project costs	4,700	4,700	9,400

Project Match

[Some] Other ways to achieve match

- Expand "project" definition (add solely in kind components)?

- Delete some grant-funded pieces?

- Convince additional sources to donate?

One option: expand scope to add in kind match

		My org	Grantor	Totals
Materials				
	posts & concrete		1,200	1,200
	top soil (delivered)	600		600
	sign (design & fabrication)	1,200	1,200	2,400
Services				
	sign install		700	700
	repave driveway		1,600	1,600
In kind				
	plants	800		800
dig & fill planting beds				
	70 vol hrs. @ $30/hr	2,100		
	Total project costs	4,700	4,700	9,400

Numbers Deep Dive – "Admin"

"Admin"

"Administrative costs" (aka "Admin")

- Approximates your cost of managing a grant

- Usually calculated as % of <u>grant $</u> for project

- Grantor *may* allow in addition to project $

"Admin"

Why to request (*if allowed*)

- No accounting/report burden

- Unrestricted, use for any organizational expense

Free money! YAY!

"Admin"

Always check grantor's guidelines:

- Is admin allowed?

- If so, how to calculate?
  - Usually a specified %, often 10%
  - % of <u>grant $</u> requested

"Admin"

IMPORTANT:

- Admin is within total grant request

"Admin"

Admin = 10% of ???

		My org	Grantor	Totals
Materials				
	posts & concrete		1,200	1,200
	top soil (delivered)	600		600
	sign (design & fabric	1,200	1,200	2,400
Services				
	sign install		700	700
	repave driveway		1,600	1,600
In kind				
	plants	800		800
	dig & fill planting beds			
	70 vol hrs. @ $30/hr	2,100		
	Total project costs	**4,700**	**4,700**	**9,400**

"Admin"

Admin = 10% of grant $ for project

Grant request =

    Grant $ for project

    + 10% of that amount

Add admin @ 10%

Materials		My Org	Grantor	Total	
	Posts & concrete		1,200	1,200	
	plants	800		800	
	top soil	600		600	
	sign (design & fabrication)	1,200	1,200	2,400	
Services				0	
	sign install		700	700	
	repave driveway		1,600	1,600	
Inkind					
	dig & fill planting beds				
	70 vol hrs. @ $30/hr	2,100			
	Total costs	4,700	4,700	9,400	PROJECT TOTAL
	Admin % 10%		470		
	GRANT TOTAL	5,170			

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"Admin"

OH NO!

Admin makes the request too high!

What needs to change?

MAXIMUM GRANT ALLOWED

Grant $$ for project
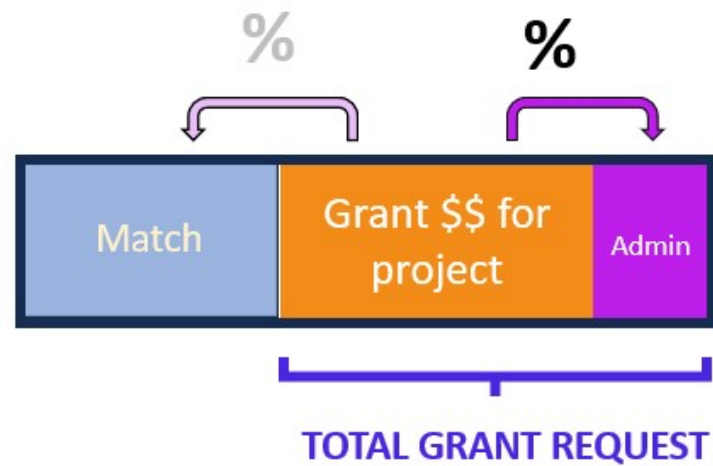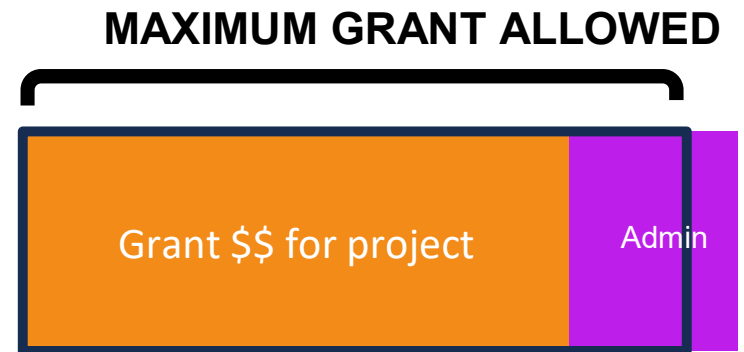
Admin

"Admin"

Reduce admin request?

- Take none? (Confer with ED!)

- Use a lower %? (Confer with ED!)

If so, use foregone admin as match?

- Check in with grantor!

"Admin"

OR…

Reduce grant $$ for project?

- Reduce project scope & costs?

- Reduce grant share of project?

How low must "grant $ for project" be to collect 10% admin AND stay under grant max?

MAXIMUM GRANT ALLOWED

| Grant $$ for project | - ?? | Admin | |
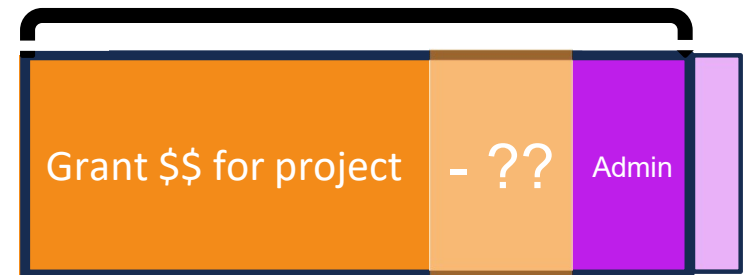
"Admin"

Determine "ceiling" grant $ for project:

- To find maximum *possible* grant money for project

- And maximum *possible* admin:
    - Divide **total permitted grant amount** by **1.*[allowed %]***
    - Request grant money for project at or below that amount
    - Actually, START with this if you know your project request is close to grant maximum

"Admin"

Again: Divide **total permitted grant amount** by **1.[allowed %]**

Just use that formula… Really.

speedy! accurate!

If you're curious, here's why it works:

- If admin cannot > 10% of grant $ for project,
- AND total project budget cannot > $50,000,
  - You ask, What amount of **grant $ for project**   **1x**
        Plus **10% of itself (admin)**   **+0.1x**
        Equals **total project budget ($50,000)**   **1.1x = $50,000**
                                                                                      x = $50,000 / 1.1
                                                                                      x = $45,455

Project Budget Formats

Project Budget Formats

Budget formats = grantor-specific

- Fixed format or "substantially similar"

- Remember – work OFFLINE

- Adapt your "working draft" to format

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Project Budget Formats

"Substantially similar"

- Mimic template to help reviewer
  - Same categories
  - Same sequence
  - Add/intersperse line items as needed to clarify

- If in kind doesn't "count," consider listing separately below

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Project Budget Formats

"Stand-alone" project budget

- Most common, especially with smaller grants

- Works best with single grantor

- "How much, from whom, for what?"

Item	Description	Total Cost	Grant Amount
Salary and Wages	- Program Manager: 2% of annual salary ($30,000) ~about 42 hours = $600 - Program Coordinator: 20 hours @ $15 per hour = $300	$900	$0
Payroll Taxes	FICA at 6.75%: - Program Manager = $41 - Program Coordinator = $20	$61	$0
Materials and Supplies	- 3 loads of organic mulch @ $100 each = $300 - 50 plants @ $5 each = $250	$550	$400
Travel	Mileage at $0.54 per mile: - Program Manager: 4 trips x 10 miles = $22 - Program Coordinator: 2 trips x 10 miles = $11	$33	$0
Total Project Budget		$1,544	$400

Basic concept; column names may vary

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Project Budget Formats

Tidy numbers = fewer headaches later

- Round up to whole dollars

- Preferably single $ source per line item

- "Match" total amount, not each item

Project Budget Formats

"Combo" annual & project budgets – revenue separate from expenses

Annual

Project (Subset of annual)

EVERYTHING COMING IN
- By source
- Amount, by source, to annual budget
- Amount, by source, to project budget

EVERYTHING YOU'LL PAY FOR
- By type of expense
- Amount, by type, paid by each source
  - Annual budget
  - Project budget

REVENUE	This Grant	Organization Budget	Project Budget Year 1
Funds Requested from This Grantor	$ -	$ -	$ -
Other Foundations		$ -	$ -
Government grants and contracts		$ -	$ -
Earned Revenue (program fees, investment income, etc.)		$ -	$ -
Donations from businesses		$ -	$ -
Donations from individuals		$ -	$ -
Special events		$ -	$ -
In-Kind		$ -	$ -
Other: Donations from civic groups		$ -	$ -
Other: Donations from churches		$ -	$ -
Other: [Add source of revenue]		$ -	$ -
Total Revenue =		$ -	$ -

EXPENSES	This Grant	Organization Budget	Project Budget Year 1
Salaries and Benefits	$ -	$ -	$ -
Consultants and Contracted Services	$ -	$ -	$ -
Operating Expenses (Rent, Utilities, Supplies, etc.)	$ -	$ -	$ -
Finance, Legal, Administration (Insurance, Taxes, etc.)	$ -	$ -	$ -
Repairs, Maintenance, Upgrades	$ -	$ -	$ -
Travel & Meetings	$ -	$ -	$ -
Special Events	$ -	$ -	$ -
Program Expenses	$ -	$ -	$ -
In-Kind	$ -	$ -	$ -
Other: Volunteer Development	$ -	$ -	$ -
Other: [Add expense description]	$ -	$ -	$ -
Other: [Add expense description]	$ -	$ -	$ -
Total Expenses =	$ -	$ -	$ -

Project Budget Formats

May adapt, format should allow same analysis

Revenue section

- Impact of project on organization

- Broad support (organization ar project)

(Use this form as a template, use categories listed)			
REVENUE	This Grantor	Organization Budget	Project Budget Year 1
Funds Requested from This Grantor	$ -		$ -
Other Foundations		$ -	$ -
Government grants and contracts		$ -	$ -
Earned Revenue (program fees, investment income, etc.)		$ -	$ -
Donations from businesses		$ -	$ -
Donations from individuals		$ -	$ -
Special events		$ -	$ -
In-Kind		$ -	$ -
Other: Donations from civic groups		$ -	$ -
Other: Donations from churches		$ -	$ -
Other: [Add source of revenue]		$ -	$ -
Total Revenue =		$ -	$ -

Project Budget Formats

Expenses section

- "Project" may be ops or program support

- Project may include prorated subset of ops

    and/or

- Additional costs if program support

- Add lines as needed for clarity

- Call grant officer with specific questions

Expenses	TFFF Funds	Organization Budget	Project Budget Year 1
Salaries and Benefits	$ -	$ -	$ -
Consultants and Contracted Services	$ -	$ -	$ -
Operating Expenses (Rent, Utilities, Supplies, etc.)	$ -	$ -	$ -
Finance, Legal, Administration (Insurance, Taxes, etc.)	$ -	$ -	$ -
Repairs, Maintenance, Upgrades	$ -	$ -	$ -
Travel & Meetings	$ -	$ -	$ -
Special Events	$ -	$ -	$ -
Program Expenses	$ -	$ -	$ -
In-Kind	$ -	$ -	$ -
Other: Volunteer Development	$ -	$ -	$ -
Other: [Add expense description]	$ -	$ -	$ -
Other: [Add expense description]	$ -	$ -	$ -
Total Expenses =	$ -	$ -	$ -

Writing Tips

- Grant narrative = effective **communication**

- Constraints:
    - Formats
    - Word limits

- One objective:
      persuade!!!

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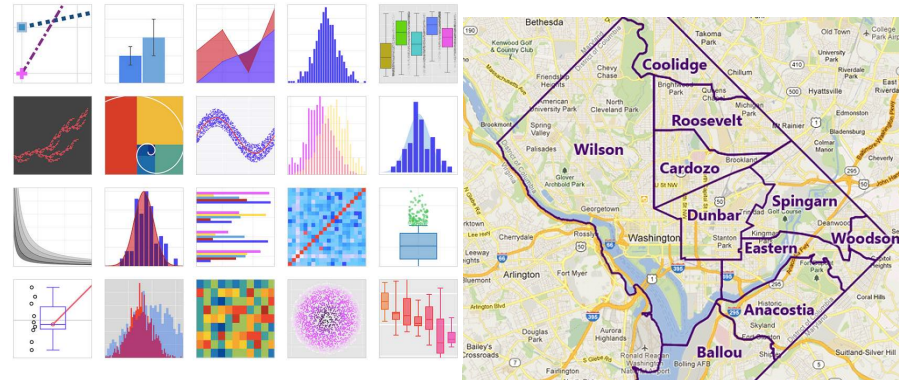
Writing Tips

Audience, audience, audience!

- What do they want to know?

- What do you want them to conclude about your organization?

Writing Tips

Writing Tips

Be a considerate "guest"

- Concision = respect

- Do the work so they don't have to!

...but what's the tune?

Writing Tips

Written language is your medium

Word choices and phrasing "are" your message
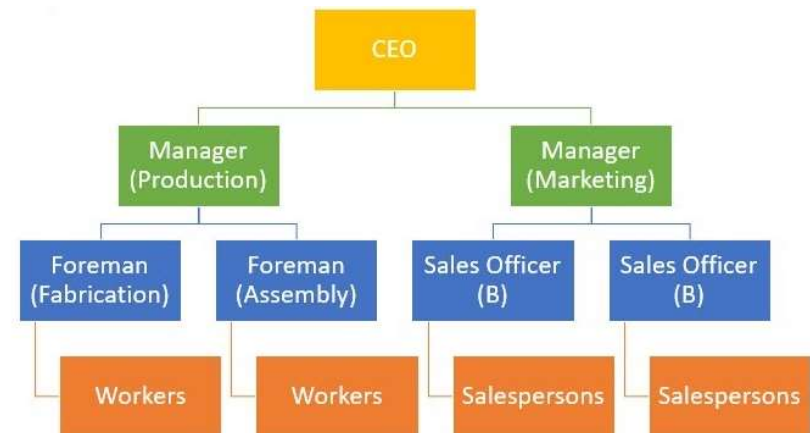
Writing Tips

Be concise.

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Writing Tips

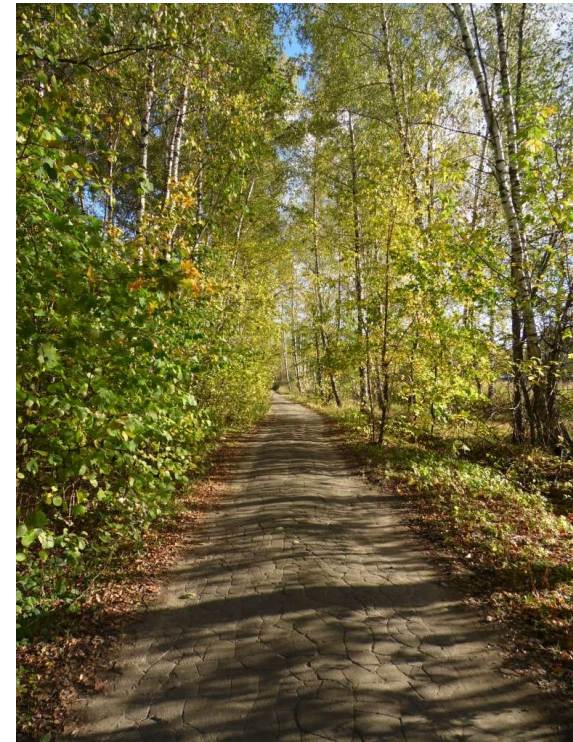1st sentence = "road map" for each answer

- "I can't tell what they want to do"

- Launch w/ overarching concept/big idea

- Separate "why" from "what"

Writing Tips

Goal: effortless experience

- Coherent landscape
- Smooth ride

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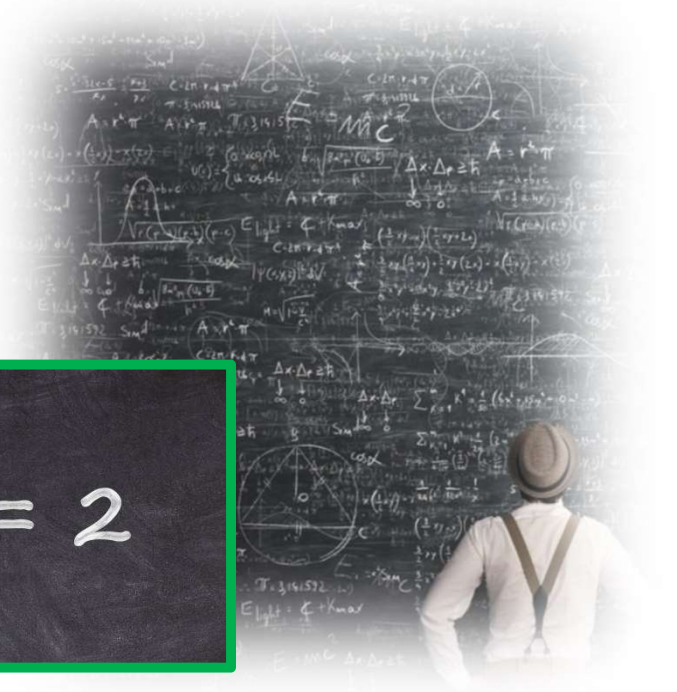United Way
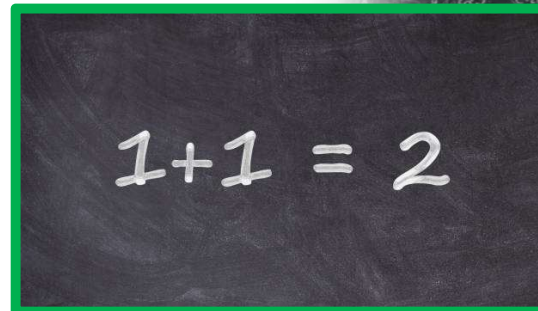
Writing Tips

Eliminate "bumpy" words

- Use normal words

- Issue-specific terms ok

- Simple, specific

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Writing Tips

Ostentatious erudition <u>detracts</u>

- Content, not form!!!
  - ~~Jargon~~
  - ~~Faux Academic~~
  - ~~Grandiose~~
  - ~~Overstated~~

1+1 = 2

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Writing Tips

Use first person plural ("we," "our")

- Org name already on cover sheet

- (Save precious space!)

- Facilitate flow

- = Personal, engaged

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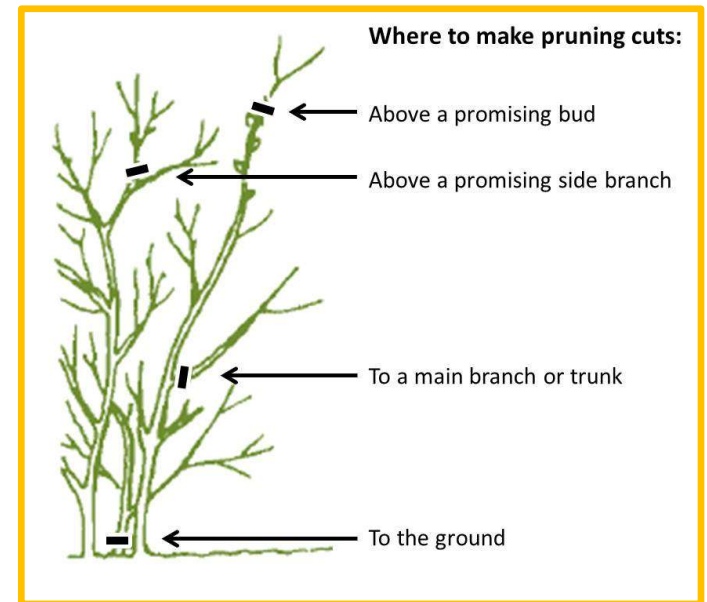Southwestern Oregon**

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Writing Tips

Clear the trail!

Writing Tips

Self-editing:

- Create "stream of consciousness" draft

- THEN self-edit

- Try using "red flag" checklist

Where to make pruning cuts:

Above a promising bud

Above a promising side branch

To a main branch or trunk

To the ground

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Writing Tips

Find & eliminate/minimize prepositional phrases

- Literally, circle every preposition
  (e.g., in, for, that, on, through, before, when, which…)

- Assess the information it introduces
  - Repetitive/implicit/obvious from context?
  - Essential/useful?

`

Writing tips

How many prepositions?

"We need to purchase a new vehicle to replace the old car that we bought from Joe's Used Cars in 1996, which we use to deliver food to our clients in part of our service area."

Writing Tips

How many prepositions?

"We need to purchase a new vehicle to replace the old car that we bought from Joe's Used Cars in 1996, which we use to deliver food to our clients in part of our service area."

Writing Tips

"We need to purchase a new vehicle to replace the old car that we bought from Joe's Used Cars in 1996, which we use to deliver food to our clients in part of our service area."

Assume this is an application from "Our Town's Food Bank."

What actually matters? How short could this sentence be?

Writing Tips

One option:

"We need to replace our 27-year-old delivery vehicle."

Writing Tips

- Preposition = "blah blah alert"

- "Blah blah" is greedy and boring!

  at this point in time = ?

  as of the date of = ?

  in light of the fact that = ?

  in the course of = ?

Writing Tips

Organization description, request for operating funds: what's important? How short could this be?

The Really Incredibly Long Name Nonprofit (RILNN) was founded in 1943 by Joseph Schmidt and his wife Mary Ellen Schmidt (nee Rockland), who were originally from Illinois and then moved to Our Town in Oregon, which was established in 1937. Our Town's population has been static at 7,000 people since 1990 but our services have been used by approximately half of that number in every year since 1993.

Writing Tips

The Really Incredibly Long Name Nonprofit (RILNN) was founded in 1943 by Joseph Schmidt and his wife Mary Ellen Schmidt (nee Rockland), who were originally from Illinois and then moved to Our Town in Oregon, which was established in 1937. Our Town's population has been static at 7,000 people since 1990 but our services have been used by approximately half of that number in every year since 1993.

One possibility:

Our 80-year-old organization annually serves

more than 50% of our town's population.

Writing Tips

- Minimize adverbs/qualifiers

  e.g. really, very, slightly, completely, basically, extremely, actually, greatly, etc.

  - Verbal junk food

  - Ubiquitous & meaningless

  - Tend to <u>weaken</u>

Writing Tips

- Verbs are **superheroes**
  - tell more w/ fewer words
  - maintain reader's momentum
  - save space

- Don't "repeat" with a modifier
  - E.g., "anticipate ~~in advance~~"
  - "rebound ~~after~~..."
  - "straining ~~with all of her might~~"

Writing Tips

- Use active voice
  - Causation
  - Action quality
  - Imply consequence

Example:
The mirror was broken by the noise and force that was released after the dynamite was lit.
vs.
The explosion shattered the mirror.

Writing Tips

What's happening here?

In passive voice, describing facts.
In active voice, in grant request for tractor $$.

Writing Tips

- Consistent nouns = guideposts

  - Maintain reader's confidence

  - Uncertainty distracts

  - Same word(s) = same thing

    e.g. if 'ground floor exit' in paragraph 1
          not 'the door' in paragraph 2

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Writing Tips

Department of Redundancy Department

Delete redundant pairs

each and every ~ first and foremost ~ various and sundry

Writing Tips

If this were your first sentence, what could you cut?

The ground floor suite of rooms that DKEJNT has been using for the past sixteen years in downtown Our Town isn't big enough even for the size of staff now employed by DKEJMT size, which has grown rapidly from just two people in 2008, to four people in 2010, and has become a staff of twelve people in 2023, partly because the pandemic created such an enormous new demand, and especially because each staff member needs room for their own equipment.

Writing Tips

101 words

Most adolescent children and their families in Smith County are experiencing hunger every day. Since the onset of the pandemic, the demand for youth hunger relief programs in Smith County increased by 40%.

Smith County is a rural community with limited food pantries that are accessible to youth and their families. With the increased demand, local food pantries are only able to serve one out of four individuals who seek their assistance. In order to address this gap, Amazing Nonprofit has developed a partnership with local grocery stores and restaurants to host pop up farmer's markets with leftover produce and meals.

59 words

Most Smith County youth are hungry every day, with 40% more since early 2020.

Area food pantries are too remote for this primarily rural population, and pantries' food supplies so limited that they cannot assist 75% of existing would-be clients.

We will provide food for rural youth via pop-up "markets" offering goods donated by partner grocery stores and restaurants.

United Way of Southwestern Oregon

United Way

Writing Tips

Draft a 1st sentence summary, in 8-12 words

Today it was determined that a recent ruling by the Illinois Supreme Court would be allowed to stand. The case involved whether the court should or should not grant custody of a baby boy to his biological father, even though that father has never seen his son. The original Illinois ruling which granted custody to the father was appealed to the Supreme Court, and today, in an order written by Justice John Paul Stevens, the U.S. Supreme Court refused to delay the Illinois ruling.
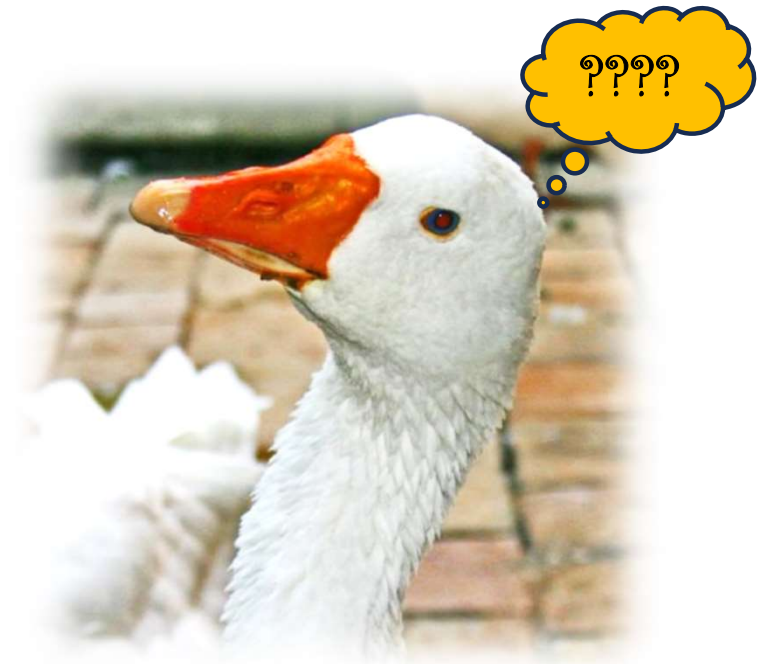
Writing Tips

When almost final:

- Let it sit for a day

- Read it aloud (reveals "bumps")

- Request honest comments
  from someone you trust

Thank you!

Questions?

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