

LET'S WRITE GRANTS!

with Julie Rodda




Rodda Consulting
DEVELOPMENT HELP FOR NONPROFITS

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About Your Presenter:

- 30+ Years in Non-Profit Sector
Volunteer, Staff Member, Board Member, Consultant!
- 10+ Years Fund Development including
Grants, Direct Mail, Capital Campaigns and more!
- Peer Reviewer and Chair of Reviews for the Office of Community Service (Federal Grant Reviewer)
- 22 million in grants awarded in past 15 years



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THE OBJECTIVES OF THIS SESSION:

- A. Converting ideas into fundable projects
- B. Navigating grant opportunities and identifying which are worth your time
- C. Identifying the key elements of a successful proposal
- D. Working through the general outline of the Community Foundation grant application

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WHAT MAKES YOUR PROJECT FUNDABLE?

- **Is it relevant?**
- **Does it answer an unmet need?**
- **Does it match your funder's passions?**
- **Has it been well thought out and planned?**

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What are some steps to crafting fundable projects?

1. Identify who you are trying to serve and why
2. Identify who should be involved in the planning of the project
3. Identify what it will take to carry out the project (funding is just one aspect!)
4. Identify who might want to partner with you and why...
 - a) Local citizens/community members
 - b) Local or regional corporate partners?
 - c) Local or regional foundations

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Navigating Opportunities



- How do you decide what is a worthwhile opportunity to pursue?
 - Relationship
 - Focus/Mission alignment
 - Time vs. Dollar Amount

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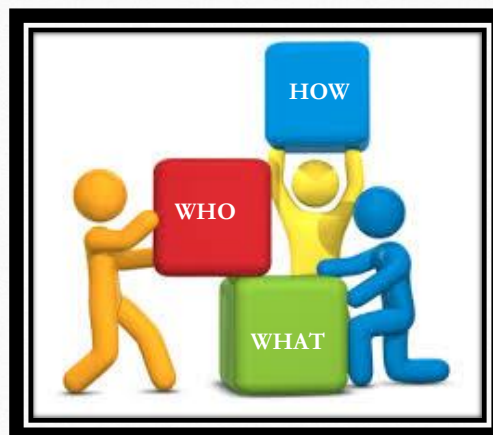
Elements of Successful Proposals

Who Are You?

What Do You Plan to Do?

How do You plan to do it?

And...How much do you need?



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Your Community Foundation Application asks great questions!

- Mission Statement
- Project Summary
- Statement of Condition/Need
- Target Population
- Project Work Plan
- Measuring Impact
- Collaborations/Partnerships
- Sustainability
- Budget

Let's look at some of these more in-depth

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First... Consider how much information is the right amount?



Enough to convey key information, and answer the proposed question.

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A word of caution:
When you're allowed more space, aim for this

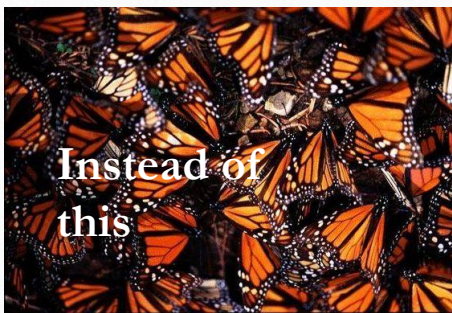


Photo credits: National Geographic Society

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The *Our Youth Matter* Program began during our nation's Bicentennial Celebration, a time when Baltimore was cleaning up inner-city neighborhoods. Unfortunately, many families were being displaced.

During that time, a respected mental health counselor named Dr. Robert Townsend began a weekly forum with youth from the inner-city to hear their views and give a voice to their concerns. That first year one-hundred teens participated. Many agreed how good this adult-to-youth interface was for them, noting this structured of friendship helped them navigate the many challenges they faced. This was the seed from which our adult/youth mentorship program grew.

Baltimore's inner-city streets are still evolving today. Within this landscape, mentorship programs that give voice to at-risk youth as they navigate life's challenges remain our core focus of service.

127 words, 869 characters including spaces

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What did we learn?

Did it leave an imprint?

What kind?

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Think & Practice!

Tell the person sitting next to you

- who you are,
- when and why you started,
- and what good you create because you exist!

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Summarizing your project

- Describe what you hope to learn or accomplish with this project or program.
- Include a concise description of the project/request including goals and expected outcomes.
- Describe also how it fits with your organizational mission and other programming.

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Addressing the 'What' – Project Summary



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Identify What You Are Going to Be Asking For:

Project?

- Hire a staff person to expand capacity?
- Build a building or renovate an existing one?
- Build awareness of a critical issue?

Program?

- Initiate a new program?
- Expand an existing one to meet demand?
- Redesign an existing program to meet a changing environment/clientele?
- Respond to a growing health need?

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Outline what you want to do, and why

The basis of good story telling always includes the Who, What, When, Where and Why.

- Tell how you determined or identified the need
- Tell how you will approach solving the identified problem, and why you chose this approach
- Tell how this program or project aligns with your strategic goals

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Outline what you intend to do, and why it's necessary.

- Tell **HOW** you determined or identified the need.
- Tell **how** you will approach solving this need, and why you chose this approach. (the 'what')
- Tell **WHAT** exactly will happen (eg. 25 people will be served)
- Tell **Where** and **When** it will take place. (location, times, etc.)
 - Will it have phases or be accomplished all at once?

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Need – a few notes about this important section

- Document the needs of your community, service area, region, etc. with verifiable information. Use available statistics if possible to underscore the urgency of the situation.
- Make sure this is conveyed appropriately...do not over simplify or over-emphasize. Facts truly do speak for themselves.
- Do not show the problem as too big for your competency level to address!

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Where's the Beef?

- What are some ways to find data for THIS area or region?
- Brainstorm and let's report!

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They want us to note
goals, outcomes, and

**Evaluation and
measuring
success...**

What does this mean?



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Goals are Big, Strong and Speak to the Reason You Engage what you do...

Objectives are 'focus areas' within that stated goal that help measure progress on the path toward reaching your goal

Outcomes are what happen when objectives are implemented through specific, identified **ACTIVITIES**.

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- **NOTE:** Activities are Not Objectives —
- **Objectives must have a measurement statement.**
- Try to keep the **number of objectives to three or less** because you will need to measure these



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Sample:

The Goal of the ‘ABC Program’ is to eliminate Human Trafficking of youth in our area.

Objective 1: Inform.

Increase awareness of Youth Trafficking for up to 200 professionals in our region

Activities that support this objective:

- a) Create brochures for law enforcement, health care workers and social service providers
- b) Hold a multi-agency conference on the presence of Human Trafficking
- c) Meet monthly with school counselors to ...

Objective 2: Intervene.

Provide street-outreach services for up to 150 at-risk youth during the funding period

Activities that support this objective:

- a) Outreach workers visit known teen hangouts 3 days weekly to identify potential trafficking victims
- b) Outreach workers distribute food and emergency supplies to homeless, at-risk teens to gain trust
- c) Outreach workers distribute emergency contact info for when teens are ready to accept help

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Let's Practice!

Note **ONE** goal, and then **TWO** outcomes you would like to measure within that goal.

What are the activities that will support achieving the outcomes?

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The 'who' – tell why YOU are capable



- Tell about your expertise or years of client service (e.g. from 2000 – 2018 we provided 100 children with quality programs and services)
- If you have specific expertise include that information (social workers, educators, specialists, etc.)
- Don't over-state: Be brief, be bright, be done!

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Example:

Since 1996, XYZ Organization has provided quality programs for area youth. We continually build capacity through training our staff in *'ABC Best Practices'*. Last year alone, 75 youth and family members received quality services from 'XYZ'. We are poised to move forward with this initiative once funding has been realized.

It is our hope that you will partner with us in this important endeavor that complements your mission and vision *'to enhance the quality of life for the residents of our regional community'*.

86 words, 450 character spaces including line breaks (500 character limit provided)

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Example 2:

Last year, the *Chronicle News* recognized our organization as the fastest growing conservation group in our state! That article authenticated our important work in this regional community, and highlights the value and trust our supporters have placed in us to cause this wonderful growth.

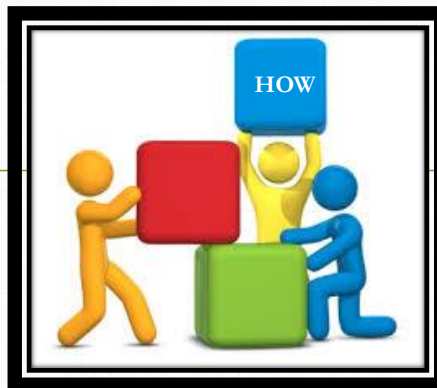
It is our hope that you will partner with us in preserving the natural environment for future generations to enjoy!

61 Words, 400 character spaces of 500 allowed

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Budgets



Never underestimate the power of a clear, clean budget when words are limited.

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PROJECT EXPENSES:

Four (4) training classes are planned representing a **\$72,000** volunteer recruitment/training budget for the fiscal year. (2017/18) Request is for 1/4.

(Staff) Recruiter/Trainer Salary	\$8,600
(Staff) Member Benefits and Taxes	\$2,500
Recruitment Billboards	\$2,000
Radio Recruitment	\$1,900
TV Recruitment	\$2,000
Direct Mail Recruitment	<u>\$1,000</u>

Total of all above: \$18,000

\$18,000 x 4 classes = \$72,000
 (400 CHARACTERS WITH SPACES)

PROJECT REVENUES: (ANTICIPATED & SECURED)

National CASA Association - received	\$40,000
The Charles M. Bair Family Trust - (Pending determination. The trust provided this level of funding last year and are open to receiving a request again)	\$18,000
Dennis and Phyllis Washington Foundation - (pending your determination/review)	<u>\$14,000</u>

Total Revenues for Project: \$72,000
 (300 CHARACTERS WITH SPACES)

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A sample capital project budget...

Project Cost Overview:			
I	Land Costs	\$	87,000
II	Hard Costs (Site Improvements, fees, permits, curbing, street, System Development, etc.)	\$	160,668
III	Building Costs (9,200 sq. ft. @ \$100/Sq. ft.)	\$	920,000
IV	Soft Costs (Engineering, Architect, Site Analysis, Certifications)	\$	58,108
V	Financing Costs	\$	32,855
VI	Developers Fee	\$	-
VII	Cash Contingency at 10% of total Project	\$	125,863
Total Costs:		\$	1,384,494
Revenue Sources (committed, pending and anticipated)			
	First Interstate Bank (local, Billings)	\$	75,000 received
	Local Tax Increment Finance District (TIF)	\$	50,000 approach Oct. 2013
	St. Vincent Healthcare Missions Fund	\$	100,000 applied
	Fortin Foundation	\$	175,000 apply in Oct. 2013
	MJ Murdock Charitable Trust	\$	275,000 pending site visit/grant review
	Individual Donors	\$	50,000 approach fall 2013
Sub-Total, Anticipated Revenue Sources		\$	725,000
Remainder to be financed through local bank if not raised through further grants		\$	659,494

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Know your attachments!

- Items Typically Requested:
 - IRS ruling of nonprofit status [501 (c) 3]
 - List of Board of Directors
 - Annual Budget (operating budget)
 - Statement of Financial Activity (Profit and Loss statement)
 - Statement of Financial Position (Balance Sheet)

- Often requested:
 - Copy of most recent Form 990
 - Copy of most recent Audit

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Pulling it all together for delivery

- Cover Letter –what’s in it?
- formatting & packaging (use of headers/footers for data),
- Plain report cover if at all...do not bind or staple!
- Don’t use FED EX to make deadline...plan ahead and get it done on time!

- If done online packaging and mailing doesn’t apply 😊



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More Help is Available...



Schedule a **FREE** consult.
It really is that simple.

(* Your introductory call is always free).

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