Tracie Parker
Owner, Parker Consulting Group & INSIGHT Partner Alliance

Over 26 years of executive leadership experience in the private and nonprofits sectors helping multi-million dollar organizations achieve sustained growth.

Invest Time Up Front!

- Read the Guidelines/Instructions <u>very carefully!</u>.

- Do NOT write a single word until you have read ALL of the funder's instructions.

- Highlight anything relevant or important that they say to do, or not do, include, etc… *QA check for later!*

- Read & highlight ALL funder's documents with scrutiny – *looking for Easter eggs*.

- Always follow the funder's format to a "T".

- Use forms provided by the funder.

- Once your grant proposal is in final draft, **<u>read the guidelines AGAIN</u>** to make sure you have not missed anything important.

Things to Consider

- Grant period vs. project period (start and end dates)

- Payout process and timeline

- Evaluation criteria

- Expectations on collaboration

- Reporting expectations

- Any other details that might impact your project's successful fit with the funding opportunity
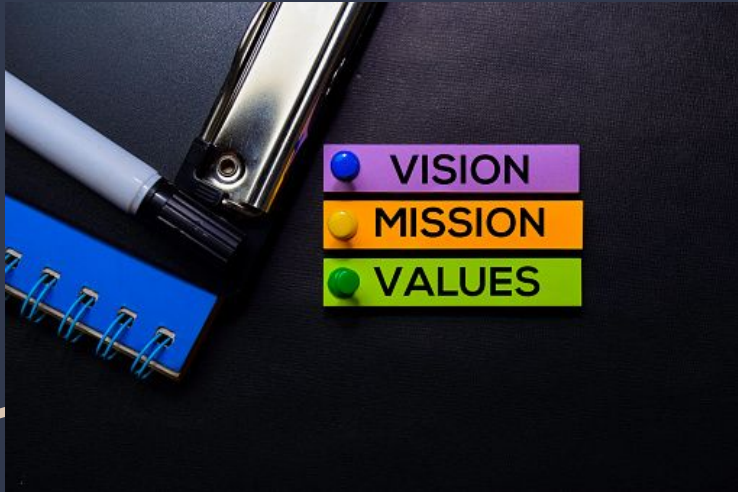
Let's get writing

Core Elements of Your Narrative

- **Introduction**… *What's your history and mission?*

- **Problem Statement**… *What is the Community Need and Why?*

- **Purpose.**.. *What are you doing to solve the problem?*

- **Outcomes**… *How do you know you made a difference?*

- **Sustainability**… *What's your plan when the grant funds run out?*

1: Introduction

- **Organization History**… *Brief explanation of how organization came about*

- **Mission & Vision**… *Weave these into the narrative, don't just say, "The mission statement is…" unless they specifically ask for your mission statement.*

- **Target Population**… *Describe those who benefit most from your organization's programs/projects.*

- **Geographic Area**… *Keep the funder in mind: what counties/cities would be most familiar to the funder?*

2: Problem Statement

- Research-Based Evidence of the need addressed by program/project

  - Can be specific to your location OR a proxy study (similar data and conclusions with direct correlation)

  - Use credible sources and the most recent publications

  - Cite your sources; your choice to include a full references section or not

- State how the funds will help your organization address the need
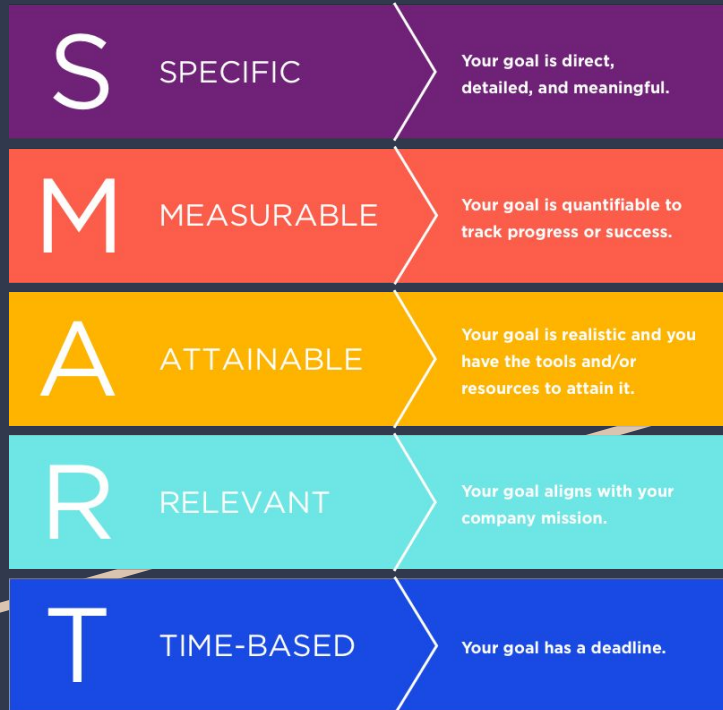
- Include an impact story

3: Purpose

- How does the program/project address the need identified in your problem statement?

- Walk thru how your program/project works

  - Answer all the Ws - Who, What, Where, When

  - Are there multiple branches that operate under one program?

  - Is the project comprised of several different events?

- Highlight your partners. Funders like to see collaboration.

- Catchy program/project names will stick in the funder's mind

Academic Tutoring **VS** **Brain Builders**

4: Outcomes

S	SPECIFIC	Your goal is direct, detailed, and meaningful.
M	MEASURABLE	Your goal is quantifiable to track progress or success.
A	ATTAINABLE	Your goal is realistic and you have the tools and/or resources to attain it.
R	RELEVANT	Your goal aligns with your company mission.
T	TIME-BASED	Your goal has a deadline.

What is your impact?

- Grantors want to know that the programs/projects in which they invest actually make a difference!

- Having good intentions and a heart for others is a great start but not enough to gain a grantor's trust.

- What are you trying to change?

Use the B.A.C.K.S. system

B- Behavior
A- Attitude
C- Condition/Status
K- Knowledge
S- Status

Steps:

1) *Determine your BACK*
2) *Write a SMART goal*
3) *Measure your Success*

5: Sustainability

- Do you have a diversified funding stream?
  - Donations (Corporate & Individual)
  - Grants (Government & Foundation)
  - Fundraisers
  - Earned income

- How does your organization sustain itself and/or the program/project?
  - Volunteers
  - Donated time by staff/administrators
  - In-kind donations from community (i.e., building space, lowered fees, etc.)

- What specific role do your partners play?
  - Local restaurant supplies food at your event
  - Company/Professional donates staff time for a component of your program
  - Organization provides space for program
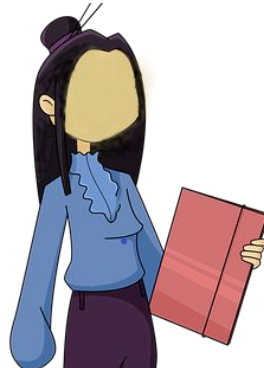
Through the Funders Eyes

Who are they?
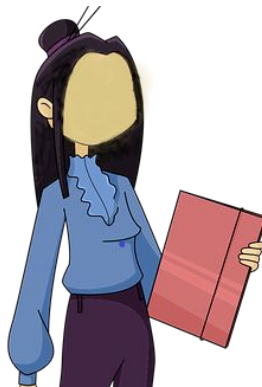
Through the Funders Eyes

1. They may be no-nonsense, bottom-line, get to the point-ers.

2. They may be "tell me all about everything," heart-felt, compassionate listeners.

3. They may be "just the facts ma'am," data – stats / stats – data, scrutinizers.

4. They may be "show me the vision" imaginists compelled by the potential long-term impact of your program.

Through the Funders Eyes

One Thing is for SURE...

They are likely exhausted from reading an endless sea of proposals.

So, do them (<u>and yourself</u>) a favor and...

- Follow their format!

- Include everything they ask for, and use <u>their forms </u>if provided!

- Create a comprehensive <u>but concise </u>proposal, strategically balanced to appeal to everyone in the room!

- Make sure your budget matches your narrative, or that your narrative clearly explains why it doesn't!

Budgets

Your budget tells its own story.

Your budget should be realistic

Align with the size of your budget

Each program has its own budget with cost and revenue
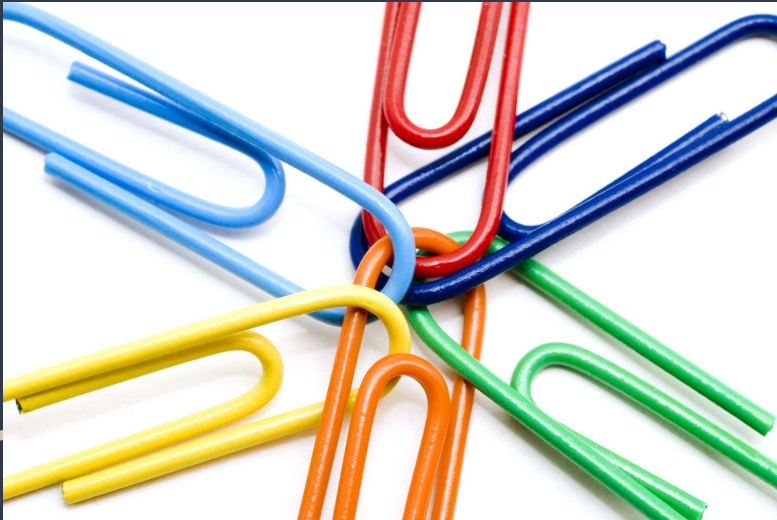
Your bottom line reflects either need or balance

In-kind should match in income & expense

Include "Ask" column to track requests/awards

[Mock Budget](#)

Attachments

501c3 Designation Letter

Board List - *detailed*

Partner Letters

Budgets - *operating, program, project*

Audited Financial Statements

Profit & Loss Statements

Form 990

Program Collateral - *forms, flyers, photos*

Language Library

Who will own this task?

- Save time and energy - don't write narratives from scratch every time, or hunt through old grants to find pre-written narratives!

- Compile your narrative responses in a singular, easy to reference location to save future you a lot of hassle.

- Keep all relevant attachments, stats, and other information in one place.

Leadership Team

Board of Directors

HR Team

Financial Team

Programming Teams

Grant Writing Team

A compelling application will have:

- Well organized **proposal sections.**

- Clearly defined **problem statement**.

- **Strategies** for how you address the problem.

- **Measurable outcomes** in lieu of boring stats.

- **Supporting data** to emphasize your problem statement <u>and</u> program outcomes.

- A **logical, structured, and concise** argument for support.

- A **budget** that aligns with your mission and exhibits <u>fiscal responsibility</u> and <u>program sustainability</u>.

- **Emphasis on community partnerships** with other organizations and/or businesses.

- The **funder's terminology** echoed throughout the proposal**.**

- Responses written specific for that funder – **not regurgitated, canned language**.

- **Testimonial stories** intertwined throughout.

- A narrative that proves **a thorough understanding of the issue** and how your program successfully addresses it.

Writing a Compelling Proposal!

Remember, funders want to…

1. Invest in sustainable programs.

2. See THEIR money in action.

3. Feel like a part of the solution.

Pro Tips!

- Break up longer narratives into more visually bite-sized, readable chunks

- Try to weave your success story throughout the response narratives

- No matter how good you are, <u>always</u> have someone else proofread your work

- Do not write directly in an online platform

- Pay attention to character vs. word count

- Nonsense test narrative fields & beware of pop up questions

- Keep your own draft copy of everything you submitted

Are You Ready to Win Grants?

CHECKLIST

Create a Strategic Plan

Create a Strategic Plan!

Step 1	Step 2	Step 3
Identify & List Funding Needs	Research Funders	Build Your Pipeline

Step 1: Funding Needs List

Program	*General Operating*	*Capital*
• Direct Program Impact • Community/Participant Based Outcomes • Specific Program Budget • More Restrictive • Risk of Grant Dependency • More Funder Options	• Covers Operating & OH • Often Flexible & Multi-Year • Harder to Measure Success • Less "Enticing" to Funders • Risk of Grant Dependency • Further & Fewer Between	• Finite Timeline • Specific Budget • Project Based Outcomes • Can be tied to Programs • Lack of Direct Impact • Can be Harder to Find

Step 1: Funding Needs List

1. Identify each program and/or service for which you need funding.

2. Identify the costs associated with each project.

3. Identify when the funds are needed.

4. Prioritize your needs list by date.

Funding Needs List

Program	Need	Cost	Date Needed
Blind Babies Program	Scholarships	25,000	4/1
Transition Services	Expansion	15,000	6/15
Student Readiness	Student Supplies	5,000	8/1

Step 2:
Research Funders

Where to Look

- Grants.gov

- Google.org

- Google Ad Grants

- Grantwatch.com

- Local/State Funding

- Guidestar

- Board Members

- Funders Supporting Like-Organizations

- Funder Databases

Step 2:
Research Funders

Popular Funder Databases

- The Catholic Funding Guide
- The Chronicle of Philanthropy
- Community Foundation Locator
- Devex Pro Funding
- DonorPerfect
- Foundation Directory Online
- GrantForward
- Grant Gopher

- The Grantsmanship Center
- GrantScape
- GrantSelect
- GrantStation
- GrantsPLUS
- GrantWatch
- Instrumentl
- Pivot

Step 2:
Research Funders

What to Look For

- Funder's priorities

- Eligibility requirements

- Deadlines

- Application procedure

- Amount of funding available

- Limitations on funding (i.e., reimbursement, cost sharing, match)

- Giving History (Form 990)

Step 2: Research Funders

For Example

The Lawrence Foundation

Focus Areas: Environment, Human Services, Disaster Relief

Includes: Emergency Aid, Biodiversity, Community & Economic Development, Education, Environment, Family Services, Food Security, Social Services, Healthcare, Museums, and Natural Resources.

Dig Deeper!

What are their interests… really?

What is their reach (local, regional, national)?

What is their giving history (how much and to whom)?

Step 2: Research Funders

Lawrence Foundation Giving History

2019

Award by Type	
45.0%	Wildlife/Nature/Climate
25.0%	Social Service
20.0%	Youth Development/Education
5.0%	Healthcare
5.0%	Housing/Urban Development
0.0%	Other

2021

Award by Type	
52.9%	Wildlife/Nature/Climate
17.6%	Healthcare
11.8%	Social Service
11.8%	Youth Development/Education
5.9%	Other
0.0%	Housing/Urban Development

2022

Award by Type	
51.7%	Wildlife/Nature/Climate
17.2%	Healthcare
13.8%	Youth Development/Education
10.3%	Social Service
6.9%	Other
0.0%	Housing/Urban Development

Clear Instructions & Grant Application Online

Based in California – No geographic restrictions

Step 3: Build Your Pipeline

- Funder's Name & Website Link
- Funder's Contact Email, Phone, Address, & Region
- Grant and/or Letter of Intent Due Date
- Internal Deadlines (if applicable)
- Date & Amount Submitted
- Award Date & Amount
- Critical follow up dates – post-funding reporting, thank you notes, etc.

- Funder's Objectives
- Program Submitted
- Comments/Feedback
- Win/Loss
- Loss Reason
- Application Delivery Method
- Username and Password (if applicable)
- Priority Status – Low, Medium, High

Step 3: Build Your Pipeline

Funder / Grant		Internal Due Date	LOI Due Date	Grant Due Date	Award Date	Submitted Date	Follow Up Due Date	Amount Submitted	Amount Awarded	Funder Objectives	Program Submitted	

Contact	Phone	Email	Address	Local Regional National	Comment / Feedback	Win/Loss	Loss Reason	App Delivery Method	UN	PW	L/M/H

Step 3: Build Your Pipeline

Now prioritize – Low, Medium, High!

- ○ **Later**
- ○ **Tomorrow**
- ○ **Today**
- ● **NOW**

- Are your missions a clear match, or a bit of a stretch?

- Does their giving history indicate a clear proclivity for your type of program, or is there a way to tie your program into something they are clearly interested in?

- Are they local or regional vs. national, which is an indicator of competitiveness?

- Are the application and instructions public and easily accessible, or is it a private foundation that doesn't accept unsolicited bids... and therefore you need an "in"?

Step 3: Build Your Pipeline

Funder / Grant	LOI Due	Grant Date	Internal Deadline	Date Submitted	Amount Submitted	Award Date	Award Amount	Funding Initiatives	Program Submitted
John L. Volk Foundation Inc. (Private - No website)	ROLLING	ROLLING			5K-25K			Arts, Comm/Econ Dev & Improvement, Environment, Historic preservation	
Stiller Family Foundation	ROLLING	N/A			5K-25K			Arts, Educ, Comm & Econ Dev,	

Funder / Grant	LOI Due	Grant Date	Internal Deadline	Date Submitted	Amount Submitted	Award Date	Award Amount	Funding Initiatives	Program Submitted
J. M. Rubin Foundation, Inc.	N/A	3/1/21			5K-10K			Educ, Human Services, Health.	Consider approaching for guaranteed scholarships to kids that graduate POH program
Lawrence Foundation	N/A	4/30			5K-10K			Emerg Aid, Biodiversity	Recommend: HT, Vet, POH

Funder / Grant	LOI Due	Grant Date	Internal Deadline	Date Submitted	Amount Submitted	Award Date	Award Amount	Funding Initiatives	Program Submitted
Ibis Charities Foundation	N/A	7/20	7/10	07/15	$50K	TBD		Health, Educ, Family & Social Services, Env, Arts	NWCC
Lost Tree Foundation	8/31	45 days from LOI or 10/31	8/20	LOI - 8/21	$25K	12/31		Palliative care & shelter for homeless; domestic abuse (prevention, palliative, counseling); Literacy	NWCC
Libra Foundation, Inc. (Private - no website)	8/15	10/16 (mid Oct)	8/03 10/9	8/10	$40K	Dec-May		Education, Health, Homeless, Hunger, Women & Children, Seniors, Special Needs	COH
Fortin Foundation of Florida, The (Private - No website)	9/25	10/16	9/15 10/9	9/21	$50K	TBD		Health, Human Services, Preservation, Educ	HT Housing

990 Analysis

https://apps.irs.gov/app/eos/

Form 990-PF

Department of the Treasury
Internal Revenue Service

Return of Private Foundation
or Section 4947(a)(1) Trust Treated as Private Foundation

▶ Do not enter social security numbers on this form as it may be made public.
▶ Go to *www.irs.gov/Form990PF* for instructions and the latest information.

OMB No. 1545-0047

2021

Open to Public Inspection

For calendar year 2021, or tax year beginning 01-01-2021 , and ending 12-31-2021

Name of foundation	A Employer identification number
THE LAWRENCE FOUNDATION	13-2880731

Number and street (or P.O. box number if mail is not delivered to street address)	Room/suite	B Telephone number (see instructions)
20 VINCENT STREET		(516) 526-0181

City or town, state or province, country, and ZIP or foreign postal code
ORIENT, NY 11957

C If exemption application is pending, check here ▶ ☐

G Check all that apply:
☐ Initial return
☐ Initial return of a former public charity
☐ Final return
☐ Amended return
☐ Address change
☐ Name change

D 1. Foreign organizations, check here............. ▶ ☐
2. Foreign organizations meeting the 85% test, check here and attach computation ... ▶ ☐

H Check type of organization: ☑ Section 501(c)(3) exempt private foundation
☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation

E If private foundation status was terminated under section 507(b)(1)(A), check here .... ▶ ☐

I Fair market value of all assets at end of year (from Part II, col. (c), line 16) ▶$ 87,047,096

J Accounting method: ☑ Cash ☐ Accrual
☐ Other (specify) _____
(Part I, column (d) must be on cash basis.)

F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here .... ▶ ☐

Part I — Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions).)

		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1	Contributions, gifts, grants, etc., received (attach schedule)				
2	Check ▶ ☑ if the foundation is **not** required to attach Sch. B				
3	Interest on savings and temporary cash investments				

7a	At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?	**7a**	No
b	If "Yes", did the foundation receive any proceeds or have any net income attributable to the transaction?	**7b**	
8	Is the foundation subject to the section 4960 tax on payment(s) of more than $1,000,000 in remuneration or excess parachute payment during the year?	**8**	No

Part VII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors

1 List all officers, directors, trustees, foundation managers and their compensation. See instructions

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
LAWRENCE BERNSTEIN 575 LEXINGTON AVE 34TH FLOOR NEW YORK, NY 10022	TRUSTEE/EXEC DIRECTOR 40.00	184,749	25,385	0
AUDREY BERNSTEIN 575 LEXINGTON AVE 34TH FLOOR NEW YORK, NY 10022	TRUSTEE/PROGRAM OFFICER 20.00	57,033	14,408	0
LAURA J BERNSTEIN 575 LEXINGTON AVE 34TH FLOOR NEW YORK, NY 10022	TRUSTEE 0.00	0	0	0

2 Compensation of five highest-paid employees (other than those included on line 1—see instructions). If none, enter "NONE."

(a) Name and address of each employee paid more than $50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
NONE				

Total number of other employees paid over $50,000. ▶ | 0

Form **990-PF** (2021)

				23,242

Form 990PF Part XIV Line 3 - <mark>Grants and Contributions Paid</mark> During the Year or Approved for Future Payment

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
ACLU FOUNDATION 125 BROAD ST18TH FLOOR NEW YORK, NY 10004	NONE	PC	FOR COMMUNITY DEVELOPMENT PURPOSES	25,000
ACUMEN 40 WORTH STREET SUITE 303 NEW YORK, NY 10013	NONE	PC	FOR COMMUNITY DEVELOPMENT PURPOSES	50,000
AFYA FOUNDATION 140 SAW MILL RIVER RD YONKERS, NY 10701	NONE	PC	FOR HEALTH PURPOSES	15,000
Total . . . . ▶ 3a				3,523,700

Form 990PF Part XIV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
ANDREW GOODMAN FOUNDATION PO BOX 394 MAHWAH, NJ 07430	NONE	PC	FOR COMMUNITY DEVELOPMENT PURPOSES	7,500
ARC OF WESTCHESTER FOUNDATION	NONE	PC	FOR EDUCATION PURPOSES	50,000

Pro Tips!

- Review your grant calendar at least monthly to check for funder changes or updates

- Review at least 3 years of giving history (990s) to identify giving patterns or shifts

- Make sure to incorporate the most recent 990, every year, to look for shifts

- Document a summary of your analysis to save future you from having to figure it all out again

- Consider funding shifts in 2020 & 2021 may not be entirely reflective of the funders typical giving

- Tailor your grant narrative to better fit the funder's language and priorities

Reporting

Who will own this task?

- Confirm tracking process immediately following award, if not sooner: data metrics to be tracked, tracking method and tool.

- Prepare/train appropriate team member(s) for tracking process.

- Check monthly/quarterly to ensure information is being captured consistently and accurately.

- Calendar due date so you don't miss it.

- Report whether they ask you to or not!

Don't get Discouraged

Remember…

- National average win rates are between 10% - 30% (GPA).

- It can sometimes take 2 to 3 grants(years) to break in with new funder.

- The ratio to win a grant from a new funder can vary between 30–40%.

- The win ratio for returning funders can usually be higher, around 80%... provided you have done your homework!

Questions?

INSIGHT
Partner Alliance

Thank You

for spending time with me to strengthen your grant writing skills

tracie@pcgstrategy.com
(850) 491-0687

Bonus Homework Assignment

Let's learn from someone else's mistakes!

1) Read the Grant Guidelines for the Dreyfus Foundation.
2) Review 5 sample grants – all of which are real grants submitted for this grant opportunity.
3) Complete the Grant "Homework_Grant Rating" sheet to document your findings. What did they do well? Where did they need to do better?
4) On the following slides, you'll find some pros & cons for each of the grant sample documents. Did you have similar findings?

Grant 1: Space

✔

- Clear, brief Summary of purpose and population served.

- Strong description of the history of the program.

- Clear program descriptions - excellent detailed breakdown of each activity helping convey what the kids experience.

- Well-written. It truly sounds like an exciting and worthwhile program.

✗

- Fund Use Summary was unclear exactly how funds will be used.

- LOR narrative states "contributing to staffing and equipment costs". Missed opportunity for bigger ask. What can $5K help?

- Word-for-word repetitive language from Summary page to LOR. Wasted real estate!

- No outcomes - although not required, it helps to sell the story.

- Did not follow layout instructions.

Grant 2: Energy Whiz

✔️

- Solid description of the various target groups- hard to do when it is a wide range of people

- Solid closing paragraph

- Detailed budget breakdown that includes Dreyfus request from other funding.

❌

- Weak Org/Program Summary. Too high level. Missed opportunity to elaborate. Wasted real estate.

- Fund Use Summary unclear on how funds will be used. No consolidated budget narrative within LOR explaining funds use.

- Repetitive language from Summary page to LOR. Wasted real estate!

- No outcomes results to support impact statements.

- Unpolished. Stream of thought. Poor grammar. Incomplete Sentences. No letterhead or logo.

- Did not follow layout instructions.

Grant 3: Healing with the Arts –HEART

✓

- Catchy program/project title

- Great detailed budget narrative! *Although… it wasn't required. Could have used valuable real estate to provide more program context.*

- Part of larger network in the state (not figuring it all out on their own)

✗

- Weak Org/Program Summary. Too high level. Missed opportunity to elaborate on program and location of services.

- Unnecessarily duplicated Summary prompts on LOR. LOR is barely 2+ pages. So many missed opportunities and narrative leaves you with more Qs than As.

- Numerous superfluous statements with no foundation or supporting citations.

- Needs more explanation on details of program (how, where, when) and qualifications of staff/volunteers providing interventions.

- Did not follow layout instructions.

Grant 4: Justice for All

✔️

- Attempted to include a professional cover sheet - *but missed the mark, by a lot*.

- Catchy program title.

- Problem Statement with supporting data.

- Subheading format allows the story to be more easily digested by the reader.

- Clearly states how funds will be used with supporting budget detail.

- Includes defined outcomes objectives - *but are they attainable?*

❌

- Applicant blatantly disregards layout instructions.

- Local statistics would be more relevant.

- Problem Statement is a bit confusing - who are helping?

- Sustainability section does not convey a plan to remain sustainable.

- Evaluation plan does not align with the objectives.

- Funds use is questionable - customized collateral to "develop quality clients".

- Didn't follow funder layout instructions.

Grant 5: Education and Community Access

✔️

- Strong Funding Summary.
- Exceptionally written narratives. Story flows, is easy to follow, and leads you on a journey.
- Good connection of staff and use of volunteers.
- Clear connection of requested funding use to the overall project budget.
- Lots of stats, some citations.
- Thoroughly described each program for which they are seeking funding.

❌

- Weak budget layout and overall budget narrative.
- Outlined Outcomes but didn't include results. This is more obvious in contrast to their providing supporting stats throughout the narrative.
- Easy to get lost in the numbers in the paragraphs. Breakout heavy data sections into chart/columns where you can.
- Didn't follow funder layout instructions.

Q&A Responses

Can you give more examples of Outcomes vs. Outputs?

Outputs are the activities you do or accomplish that help achieve outcomes. Outputs seek to capture "how many/how much" of something is being accomplished?

Outcomes are the results of those activities for individuals, families, groups, or communities. What will change in the lives of individuals, families, organizations, or the community because of this program? How will this program make a difference to individuals or the community? How are the lives of program participants better because of the program?

Program	Outputs	Outcomes
Parenting Skills Classes	# of parenting classes conducted/attended	70% of parents report that they feel more confident and provide better care for their children after completing our training series on "Positive Parenting."
Early Literacy	# of students participating in early literacy program	80% of students have increased their reading level by one grade after completing our early literacy program.
Art in the Park sculpture display	# of sculptures placed in the park	92% of park visitors indicate an increase in community pride and sense of ownership.

How do you balance making it concise with filling up all the space/characters?

The character or word space provided by a funder gives you a clear indication of how much or how little detail they want to hear. If limited characters/words, they want you to get directly to the point without a lot of superfluous language. If given a higher character/word count, then do your best to fill the space with more program detail and/or supporting data. In a nutshell, review your narrative to identify where you have unnecessarily superfluous language and replace it with more detailed content or data. Here is an example of a short, succinct narrative:

Describe Program/Project (1000 characters permitted / 974 characters used)
*The **redacted** community is deeply impacted by poverty. **Redacted** was ranked 50 out of 50 large cities for economic mobility with major divides between white households and minority households (County research study citation name). Poverty at this level burdens government programs and stifles the economy. **Redacted's** education and support services strive to decrease the financial*

strain that poverty has on the community. Collaborating with 30+ community partners, we leverage resources to further our collective mission to bridge inequality for low-income minority households.

***Redacted**, a 5-year accountability program, creates a direct pathway for participating families to access critical tools needed to escape poverty. Supportive services (life coaching, goal setting, life and job skills training) help families gain the skills needed to overcome obstacles. Direct services (childcare, transportation, education) provides immediate relief to reduce barriers to success.*

In this example, there was insufficient space to fully describe the program, which is quite elaborate with a number of initiatives. Recognizing that it is the first leading question in the program/ project section, it needs to set the stage for the rest of what they are about to read. At 1,000 characters they are looking for a brief, introduction summary. We tightened up the structure by listing service examples in parentheses vs. writing full sentences out for them. Also, they didn't include any Qs about partners and only limited space for need, so this was a good spot to interject this detail as well. Right out of the gate, it clearly states there is a need, that the organization is engaged in collaborative partnerships to leverage resources, and gives a concise summary of the program objective.

Do you include how much you're asking for from another grant on the income section of your budget when asking for funding?

This is not a simple yes/no answer. It depends. Some funders will specifically ask for you to outline other funding that you have requested and/or received for the project. If that is the case, then you should absolutely include the other funder details. If they do not directly ask for this information, your submitted budget should include both your income and expenses. The income budget can include categorized line items for funding (i.e., individual donations, corporate donations, foundation grant funding, government grant funding, earned income, fundraising, in-kind). Your funder revenue would/should be included in your income budget.

Is it better to turn in a grant when the window first opens / is it looked upon negatively when you submit on the deadline date?

Generally speaking, if a funder has a grant submission period, they are likely organized in their approach and will review <u>all</u> grants once the window has closed. Therefore, whether you are first or last in is unlikely to be a consideration one way or the other. That said, I'd encourage you never to wait until the last day to submit, unless extenuating circumstances prevent you from submitting earlier. Submitting day-of increases the probability of running into system issues (due to increased activity with lots of submissions at one time). You may also run into other technical issues and/or pop up questions that cause last minute complications. Do yourself a favor and set an internal due date of at least 2-3 days prior to the grant window closing.

If my budget is written in December for that year (doesn't tell story), how do you reconcile?

Not fully understanding the unique circumstance that prompted this question, I'll do my best to respond.

If your budget year does not line up with the funder's grant period, this in and of itself should not be a significant issue. Your budget document should indicate the budget period. It is generally understood/accepted that there may be some overlap if the organization and funder's budget/grant periods overlap (calendar vs fiscal year). The only time this would be of any real concern is if the funder specifically dictates a funding use period. In this case, you could reconsider what you are asking for to identify an amount/use that falls within the funder's specified grant period.

If there is a concern of overlap but the funder has not specifically stated a defined use period then simply be sure to explain somewhere appropriate within your narrative the timeline for the use of funds based on your budgetary needs.

Writing for grant with same funder year-over-year, should you change programs up or ask for new $$?

It is not ideal to submit the same grant proposal to a single funder year-over-year, unless you have developed a relationship with the funder and know this not to be a concern. While you may submit the same program to a prior funder, consider revisiting what you are asking the funds to be used for. Your budget undoubtedly has a variety of line items that make up the full program expense. Mix it up a bit. One year you may ask for funds to cover the cost of books/supplies and the next year to cover the cost of field trip activities/transportation. This also allows you to highlight different aspects of your program to the funder, giving them a greater understanding of the magnitude of all that you do.

Can you provide some good resources/databases to find grants that I am eligible for?

The presentation slide deck includes a list of resources and online database subscription sites. See slides 26-27.

Will we get a copy of the mock budget with the presentation?

Yes. I have provided a copy of the mock budget format. I have also provided a copy of my grant pipeline template. I hope these tools will be useful to you as you organize your grant calendars.

If writing a grant and timeline of funds is not important - does it look bad to report something to the tune of "no immediate need of funds"?

I would not recommend submitting a grant to any funder if the story (or truth) reflects that you do not need the funding. This is likely to send an unfavorable message to the funder. I am led to ask, is it that you truly do not need funding or is it just a matter of timing (i.e., you don't need it now but you will need it next year)? If planning for a future project, capacity building, or other future need, then your narrative, budget, and ask should reflect whatever that is.

What is your advice when utilizing AI to help make your narrative/project more compelling or what to avoid when using AI technology, or any other useful thoughts?

AI can serve as a practical and useful tool in grant writing. It can save time and energy by automating some of the redundant tasks, help you generate initial ideas and compelling content, and help to craft clear and concise grant narratives by suggesting ideas and phrases that are likely to resonate with funders. It can also help structure your narratives in a way that is easy to read and follow, or help you with editing and revisions.

What it cannot do is i) understand your program inside and out like you do, ii) understand the nuances of the service industry you are in, iii) have a clear vision of the overarching "big picture" message you are trying to convey, iv) understand the specific impact of your program on the individuals/populations you serve (the details of your success stories), or v) know the giving history and nuance of the funder. There is also an inherent risk of plagiarism, lack of originality, and/or inaccuracy.

I say all of that to say, AI can be a useful and time saving tool but, like with any tool, you need to appreciate its limitations. You might consider using it to get a good base narrative drafted but you should not rely solely on the responses that AI generates. You will want to go back through and make sure your narrative captures the detail, and the heart, of what you do and how you do it. You'll also want to validate any data components generated. In the end, make it YOUR own before submitting it!

How do you track in-kind donations and how to use that information in grant writing?

Every in-kind donation is an expense that you didn't have to pay. For example: your organization has to complete your tax return and 990 every year. You have a generous CPA who does this pro bono for you. The cost of completing your tax return/990 is a tangible expense. You would include the actual hard cost as an expense line item in your budget, then you will include that exact cost in your revenue budget under an "in-kind donations" line item. Doing so zeros out the expense. Meanwhile, you are now reflecting the TRUE cost of running your program(s) while also i) reflecting a more diversified funding model and ii) showing the funder that your organization/program has vested engagement from the community.

Don't forget to provide your CPA with a donation receipt for the value of their service!

What is your recommendation for keeping up a spreadsheet with due dates when due dates change often (i.e., just checking sites regularly)?

With occasional exception, most funders do not change their due dates with any level of frequency that this should be a concern. It is more likely that the general time frame remains the same year over year but the exact date changes due to where it falls on the current year's calendar. What I do personally, when I roll over this year's grant opportunities (and due dates) to next year, I recognize that I need to be sure to check the date for each one as the exact date

may change (but the month in which it falls is unlikely to change). You might highlight the date in a manner that best helps you to validate which dates have been updated and which have not. Personally, I highlight the date column in yellow so I know that it needs to be validated. Since my process is to work 3 months out, every month I am looking ahead on the calendar to start my review/preparation for those grants that are 3 months out. I will be evaluating everything about that funder's grant opportunity at that time, including verifying and updating the due date, among other things (address, phone, contact, board members, etc.). It is a fluid step in my overall process.

I encountered a circumstance only once in my career that the funder modified their process so much that their due date changed drastically enough that I didn't catch it within that 3 month look ahead. In this case, I didn't sweat it. I have prepared my pipeline calendar so that I have a solid plan for all the grants I will be writing for the year. This includes numerous grants with "rolling" due dates that I can simply move up into its place and roll that missed grant onto next year's calendar with the new due date "timeframe" so that I am sure to validate the new due date in my 3 month look ahead.

Side Note: Whenever using colors or other visuals on your spreadsheet, it may be helpful to include a legend/key at the top if other people will be utilizing the tool.

What additional accessibility measures can an organization take to ensure persons with disabilities can participate in an arts organization?

I do not feel adequately knowledgeable on this subject to provide a response as the question falls outside the realm of grant writing and outside of my realm of expertise. I do know that the goal of the ADA is to make it possible for people with disabilities to participate in everyday commercial, economic, and social activities. The law covers employment; state and local government programs, services, activities, and facilities; and businesses and nonprofit service providers. I applaud that this is something you want to actively pursue and encourage you to research ADA guidelines for the state of Georgia/South Carolina further.

State of Georgia ADA Coordinator's Office

SC Health & Human Services - ADA

Funder / Grant Opportunity	LOI Due	Grant Date	Internal Deadline	Submit Date	Award Date	Amount Submitted	Amount Awarded	Program Submitted	Funding Initiatives / Focus	Giving Range	Contact	Email	Phone	Address	Region	Comment / Feedback	Win/Loss	Loss Reason	App Delivery Method	Login	PW	Hours

Funder / Grant Opportunity	LOI Due	Grant Date	Internal Deadline	Submit Date