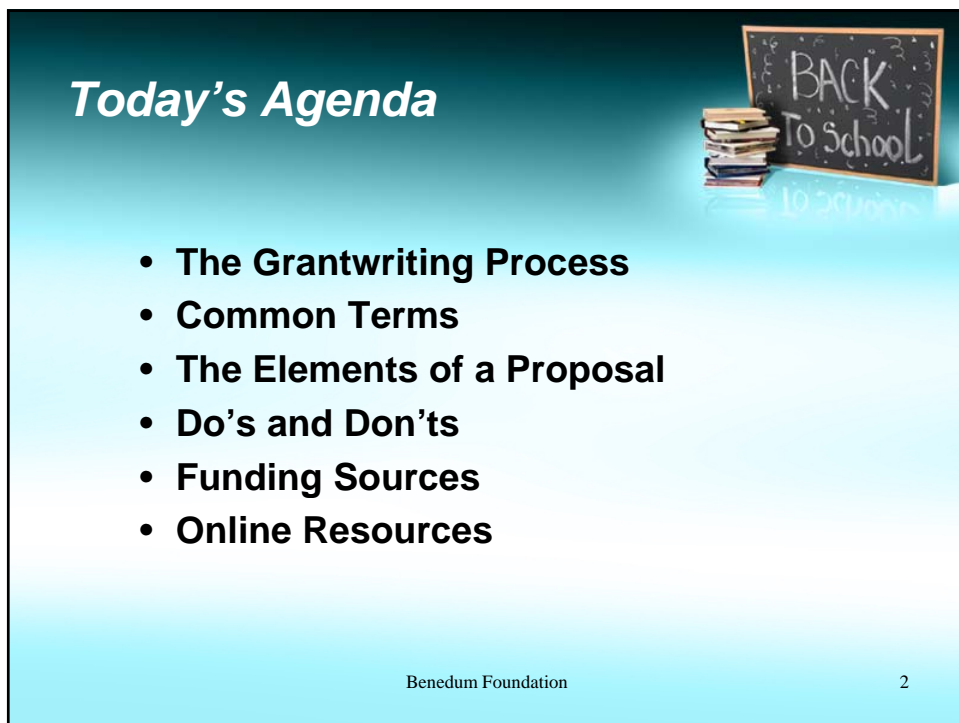


***Grantwriting Basics for West Virginia
School Based Health Centers***

**Kim Barber Tieman, Program Officer
Benedum Foundation
August 9, 2011**



Today's Agenda

- **The Grantwriting Process**
- **Common Terms**
- **The Elements of a Proposal**
- **Do's and Don'ts**
- **Funding Sources**
- **Online Resources**

Terms



- 501 (c)(3)
- DUNS Number
- CCR registration
- NOFA/RFP/RFA
- 990
- Audit
- Online Grant Application
- Attachments
- Budget Form
- Budget Narrative
- Direct Costs
- Revenue
- In-Kind Contributions
- Matching Funds
- Allowed/Disallowed Costs
- Indirect/Overhead Cost

Terms



- Need/Problem
- Target Population
- Program
- Project
- Proposal
- Abstract/Summary
- Collaboration
- Goals
- Objectives
- Methods/Strategies
- Outcomes/Impact
- Change or Benefit
- Evaluation
- Stakeholders & Sustainability

Getting Ready: A Proposal is a Process



- **What is the community need that you wish to address?**
- **Does the project promote the mission of your organization?**
- **Research potential funders who care about the need that you have identified**
- **Research the funders history of giving, giving range, and priority areas**
- **Does the project address the funders priority areas?**
- **Develop a compelling project/program**
- **Follow the funders requirements**
- **Contact the program officer or person assigned to the funding initiative or grant program**
- **Review the application requirements (online, attachments, submission format)**

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5

Getting Ready: A Proposal is a Process



- **Organizational Planning and Priority Setting (top 3-5)**
- **Write Generic Proposal and then edit to fit each funder**
- **Identify Potential Funding Sources (dedicate time to research)**
- **Initial Contact & Cultivation**
- **Does the funder provide workshops, technical support, conference calls, website postings of frequently asked questions (FAQs)**
- **Are there supporting materials to review and address such as No Child Left Behind, Healthy People 2020, etc.**
- **Learn about the funders review process and how the proposals will be scored - do not skip a section or write a partial answer**
- **Submit the Proposal and get a copy of the review**

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6

Supporting Activities



- **Research and Prepare**
 - Know your subject, need, community, funder
 - Meet with internal stakeholders
 - If collaboration is required, work with collaborative partners from the beginning
 - Create a timeline working backwards from the due date
- **Contact and Cultivate Funder**
 - Website, Telephone, Written, Board Networking, Appointments
- **Life after the Grant or Rejection**
 - Follow-up to a Grant – thank you, reporting schedule
 - Follow-up to a Rejection – thank you, call to find out what to do next, don't take it personally
 - Never argue with the funder

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7

Supporting Activities



- **When you are awarded a grant - that is the beginning of the relationship**
- **Be sure to inquiry about the payment and reporting requirement (how often, online, receipts, forms?)**
- **Keep the funder informed about progress and major set backs**
- **Follow the terms of the grant award, contract, agreement**
- **Be sure to give credit to the funder in all publicity notices, events, etc.**
- **Do not significantly change the project, goals, or budget without prior authorization from the funder**

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8

Steps to Success



- **Read and follow the directions**
- **Sell your project idea but don't oversell**
- **Recognize the competitive nature of the funding environment**
- **Keep it simple - providing too much information makes the proposal more difficult to follow**
- **Do not apply just to get money**
- **Do not apply until the project is ready**

Tips on Writing



- **Know what the funder wants - follow the directions**
- **Submit the proposal in the exact order as directed by the granting organization**
- **Get your thoughts sorted out - outline what you want to say**
- **Avoid jargon and acronyms**
- **Be compelling but don't overstate**
- **Spell check, revise and EDIT - have at least one person unfamiliar with your program read the application to tell you what's confusing or unclear**

Why Proposals Fail



- **Project is outside of funders guidelines or current priorities**
- **Project quality is poor or design is not rational**
- **Cost per client served is unacceptably high**
- **Inadequate research on the part of the applicant**
- **You applied to the wrong funder**
- **The funder did not have enough money to fund all proposals**

Funders Pet Peeves



- **Can't find the dollar amount in the proposal (send whatever you want)**
- **Tiny print and bound proposals**
- **Unfinished projects and/or exaggerated results**
- **Poor research about the funding organization**
- **Asking for assistance close to grant deadline**
- **Not living up to your contractual agreement. A grant is not a gift!**
- **Not completing the final reports or supplying receipts**
- **Not including funder in media or public relations**
- **Being late and/or not responding to funders requests**

Essential Elements of any Grant Proposal



- **Cover Letter/Letter of Application/Face Sheet**
- **Executive Summary/Abstract**
- **Need/Problem Statement**
- **Project/Program/Solution**
- **Goals/Objectives/Methods/Outcomes**
- **Evaluation/Impact**
- **Budget/Budget Narrative**
- **Organizational Information/History**
- **Appendix/Attachments**

Cover Letter/Face Sheet or SF424



Overview of the proposal – transmittal letter

- **Reference to contact information including email and website**
- **Why specific funder was selected**
- **Request amount and timeframe**
- **What is in your proposal package**
- **Offer to answer questions or meet with grantor**
- **Required Signatures/dates**
- **Anything else the funder requires**

Cover Letter - Example



Dear...

Thank you for opportunity to apply to ...

Attached is the Project Request for \$25,000 to provide an outreach program to clients in our program about diabetes prevention...

We plan to accomplish....

Attached you will find....

If you have any questions or need further information, please contact ...

Executive Summary



This is an umbrella statement of the project describing the case and summary of the entire proposal (1 paragraph to 1 page)

- **What is the Problem**
- **What is the Solution**
- **Funding Requirements**
- **Timelines**
- **Organization and its expertise**
- **Costs and support**

The Need or Problem Statement



Why is this project necessary? (1-3 pages)

- **Community Context/Problem Statement**
- **Target Population**
- **Scope of the Problem**
- **Data that best supports your case**
 - **Statistics**
 - **Examples**
 - **Be sure to reference the statistics used**

The Need - Example



Due to a shrinking pool of unskilled entry-level job openings... The unemployment rate in the neighborhood is... Approximately 40% of area residents never completed high school.

Designed to serve one of the most vulnerable, yet difficult to reach groups in our community; youth ages 16-24 who are not attending school, not employed and not enrolled in any training or supportive program...

Project Description



How the project will be implemented (1- 3 pages)

- **What do you want to accomplish?**
- **How will you accomplish your objectives?**
- **Who will carry out the project?**
- **What is the ultimate outcome – what will be improved and for whom?**
- **Evaluation - How will you measure success and shod impact?**
- **Sustainability - Does the project have a life beyond the grant period, if so what are the funding sources?**

Project Description - Example



- **What - the broad goals (long range and general – stated positively)**
- **What are the objectives (specific, measureable, attainable, realistic and time bound)of the program and the methods (steps/tasks/strategies)**
- **How - calendar of activity...plan of action**
- **Who - board and staff ...expertise**
- **How will you know you made an impact (Outcomes) and an evaluation plan...**
- **Sustainability - long term funding strategies...**

Budget Form and Narrative



Financial description of the project (Budget form and 1-2 pages of Budget Narrative)

- Expense Information (Personnel, Non-Personnel, and Overhead/Indirect Costs)
- Income/Revenue Information (including fees generated and other sources identified and committed)
- Budget Form should have formulas and add across and down with totals
- Budget Narrative is a side by side document that describes in words the budget line item numbers in the exact same order

Budget - Steps for Creating a Budget



- Identify who will help you gather the data
- List all personnel who will be involved (calculate salary and fringe costs)
- List and tabulate cost of consultants (if any)
- Think through and list all other non-personnel costs, e.g. Space, Telephone, Postage, Copying, and any indirect cost (time of executive director, etc)
- Identify revenue sources both secured and projected

Sample Budget Categories



- **Personnel**
- **Travel**
- **Equipment**
- **Supplies and Materials**
- **Consultants/Professional Fees/Subcontracts**
- **Other**
- **Direct Costs**
- **Indirect Costs**

Organizational Information



History and governing structure of the nonprofit; its primary activities, its audiences, its services (1 page)

- **Founding Date and Mission**
- **Organization's Structure, Programs, and Special Expertise**
- **Information About Staff and Board**
- **Audience Served by the Agency and the Specific Project for Which Funding is Sought**

Appendix



Supplemental Information to Support Proposal (as required by the funder)

- IRS Letter of Determination (501c3)
- Financial Information (include as needed – operating budget, audit, 990, list of past and current fiscal year foundation/corporate funders and gift level)
- Resumes (when appropriate)
- Do not add additional materials unless they are requested by the funder
- In what format does the funder need the information (pdf, jpg, acrobat, your forms or their forms - usually not compressed or zipped files)

Web Resources



- The Foundation Center <http://www.fdncenter.org/>
- Chronicle of Philanthropy www.philanthropy.org
- US Contractors Registration www.uscontractorregistration.com
- The Council on Foundations www.cof.org
- The Grantsmanship Center www.tgci.org
- Grantstation www.grantstation.com
- Corporation Website www.hoovers.org
- Guide Star <http://www.guidestar.org/>
- Technology Website www.techsoup.org
- Census 2010 www.census.gov
- WV Kids Count Fund www.wvkidscount.org
- W.K. Kellogg Foundation www.wkkf.org
- U.S. Department of Education www.ed.gov
- West Virginia Bureau for Public Health www.healthywv.org
- WVPASS www.wvpass.org

Funding Sources



- **Federal Government**
- **State Government**
- **Foundations (family, community, corporate)**
 - **Foundation Center Directory**
 - Kanawha County Library - Federal Depository
 - West Virginia State University
 - WVU
- **Corporations**
 - **Corporate Directory Foundation Center**
- **Local organizations (service organizations, public charities, interest groups)**

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27

The screenshot shows the American FactFinder website in a Windows Internet Explorer browser. The address bar displays the URL: <http://factfinder2.census.gov/faces/nav/jsf/pages/index.xhtml>. The browser's Favorites bar shows several links including 'Windows', 'Windows Media', 'Free Hotmail', and 'Customize Links'. The website header features the 'Census Bureau' logo and a map of the United States with state names like ARIZONA, NEW MEXICO, OKLAHOMA, ARKANSAS, TENNESSEE, NORTH CAROLINA, and SOUTH CAROLINA. Below the header, there are navigation tabs for 'SEARCH', 'WHAT WE PROVIDE', and 'USING FACTFINDER'. The main content area is titled 'Your source for population, housing, economic, and geographic data' and includes a 'Quick Start' section with a search form. The search form has fields for 'topic or table name' and 'geography (optional)', with a 'GO' button. Below the search form, there are radio buttons for 'topics', 'population groups', and 'industries'. To the right of the search form, there is a 'U.S. Population' widget showing '18:46 UTC (EST)' and the number '311,8'. At the bottom of the page, there is a 'News and Notes' section with a 'GET EMAIL UPDATES' button and the date 'Jul 28, 2014'.



Federal Grants

- [Catalog of Federal Domestic Assistance](http://www.cfda.gov/)
- <http://www.cfda.gov/>
- www.grants.gov
- [Federal Register](#)
- **Federal Grants Clock**
- **Federal Checklist**
- **Intent to Apply**
- **Bidders Conferences, FAQs, and Technical Assistance calls**

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Federal grants

CATALOG of FEDERAL DOMESTIC ASSISTANCE

CFDA Statistics: Programs at a Glance

CFDA contains detailed program descriptions for 2,183 Federal assistance programs. The following chart shows the program distribution for the top five issuing agencies.

Agency	Program Count	Percentage
Department of Health and Human Services	429	14%
Department of the Interior	249	10%
Department of Agriculture	248	11%
Department of Education	172	21%
Department of Justice	125	14%

Last updated August 1, 2011

About CFDA

Catalog of Federal Domestic Assistance (CFDA) provides a full listing of all Federal programs available to State and local governments (including the District of Columbia), Federally-recognized Indian tribal governments, Territories (and possessions) of the United States, domestic public, quasi-public, and private profit and nonprofit organizations and institutions, specialized groups, and individuals.

Agency Log In

- Click [here](#) if you are responsible for managing CFDA program data.

Coordinator / Analyst / Administrator Log In

- Log in [here](#).

Find Programs

Search tool: You do not need an account to search the catalog and view Federal assistance programs.

Keyword or Program Number:

Select Assistance Type:

- Advanced Search Form
- Find Programs by Number
- Find Programs by Agency
- Added Programs (since last submission date)
- Archived Programs (since last publication date)

Download CFDA 2010 Print Edition

RECOVERY

SEARCH RECOVERY PROGRAMS

CFDA User Guide

Download the CFDA User Guide (PDF format)

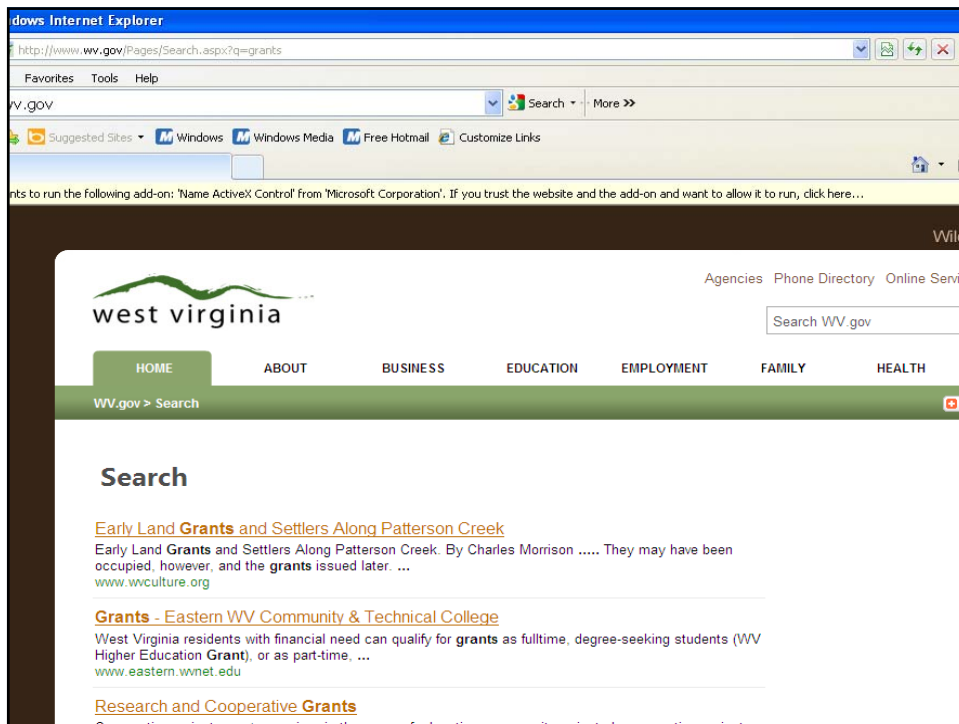
Additional Resources

- Consent to Assist Guidelines
- Search Historical Index
- Federal Service Desk
- CFDA 2010 Print Edition

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State grants

-
- When & where is the bidder's conference?
 - Who is eligible to apply for this grant?
 - Is there an electronic bulletin board, web site, or other support system in place?
 - Is the grant linked to any particular government initiatives (No Child Left Behind, Healthy People 2020) or legislation?
 - Is it an annual offering?
 - What support, if any can legislators offer?
 - Who will read and score these applications (teachers, content experts, business representatives, volunteers)?



Funding Sources



- **Corporations give in order to...promote community mission – be a good corporate citizen, gain community respect, gain public support, and impact market share. Their funding is more episodic, revolving around particular campaigns, events, and projects. Corporate funding can be a good source of support for new initiatives, special programs, and special events.**
- **Local and State Governments fund projects that benefit the people in the areas the are created to mandate. Examples are social service programs, health, rural transportation, cultural resources, and educational opportunities.**

Corporate Grants



- Their philanthropy is often driven by a desire for public recognition and to engage in employees issues areas
- Does the corporation have a local or regional site in our area?
- Does it issue an annual report?
- Do you need money or personnel?
- Will the corporation require you display their logo or other commercial signs?
- Will your organization allow such commercial displays?

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35

The screenshot shows a Windows Internet Explorer browser window displaying the Verizon Foundation website. The page features a navigation bar with links for 'About', 'Core Initiatives', 'Apply for Grants', 'Verizon Employees', 'Verizon Retirees', and 'Community Champions'. The main content area is titled 'Apply Online' and includes the following text:

Apply Online

Verizon wants to transform the way the private, public, and nonprofit sectors work together in building collaborative partnerships.

Dollar amounts are not the only measure of our grantmaking goals. The Verizon Foundation and our partners have much to offer above and beyond cash grants. Using our website you can find volunteers, Internet training, business advice and Web developers. Our online community has a wealth of resources that can help you every time you visit.

To improve your chances of a positive response to any support request, we would like to encourage you to review our Grant Guidelines and Frequently Asked Questions before you apply for a grant. We also have an online screener to walk you through each of our eligibility requirements. If you still have questions after reviewing this information, please don't hesitate to contact your local Community Relations Manager who will be happy to assist you.

Verizon Foundation receives thousands of competitive applications each year. While we cannot respond favorably to every request, we are available online 24 hours a day, seven days a week via our website. We pledge a 72-hour acknowledgement response to your electronic inquiry.

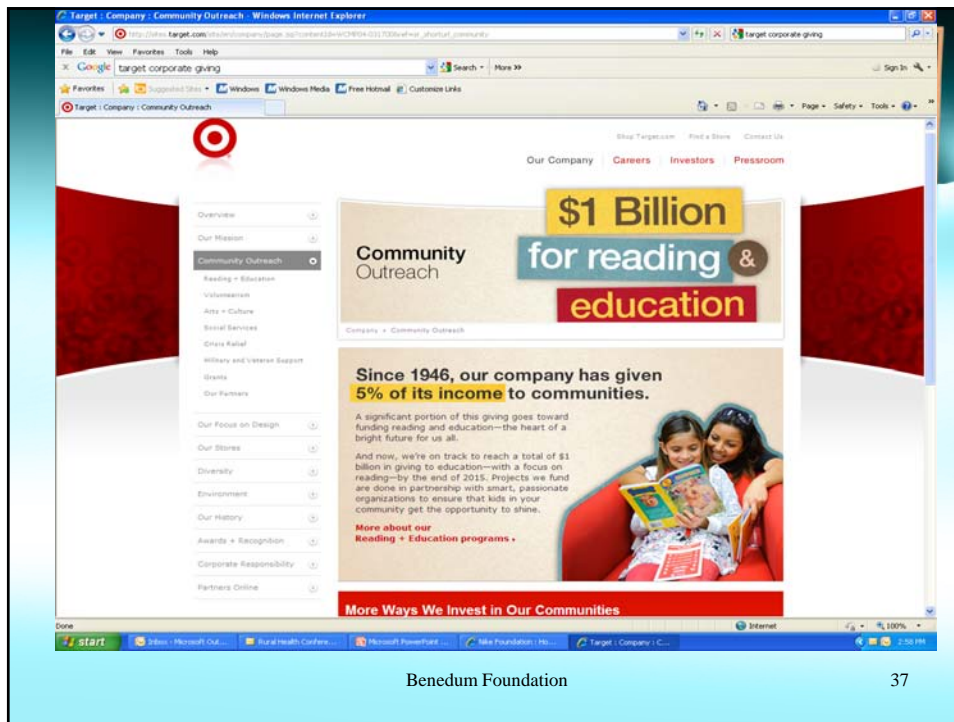
APPLY FOR A CASH GRANT NOW >

Notice of Non Discrimination: As a matter of policy, the Verizon Foundation does not discriminate on the basis of race, color, sex, sexual orientation, age, religion, national or ethnic origin, or physical disability. The Verizon Foundation is neutral on, and does not fund, programs that support pro-life or pro-choice issues.


On the right side of the page, there is a 'Volunteer Spotlight' section featuring a photo of a woman and the text: 'Verizon employee Sally Murray has been involved with the Portal to Hope since 2001. read more >>'. Below this is a 'SERVICES & LOOKUP' section with a dropdown menu for 'Is your organization an eligible 501(c)(3) or MESA School or District? Find out' and a search box. At the bottom right, there is a 'Community Relations' section with the text 'Find out what's going on and how to volunteer in your community.' and a search box for 'Enter ZIP Code'.

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36



Funding Sources



- **Federated Funds** such as United Ways, United Arts, etc., can be steady sources of relatively solid amounts of money. Available only to well established nonprofit organizations.
- **Foundations** come in various sizes and types but their grants can be important and substantial.
 - Private Foundations usually have large assets and issue annual reports.
 - Corporate Foundations are similar to private foundations but their boards are often made up of corporate officers. Their endowment funds are separate from the corporation and they have their own professional staff.
 - Community Foundations pool the assets of many donors and are usually community service organizations.
 - Independent or Family Foundations receive endowments from individuals or families.

Foundation Grants



- What is the stated mission of the foundation?
- Does the foundation offer workshops or other support for proposal development ?
- Does the foundation publish an annual report or newsletter; does it have a website?
- Does the foundation employ a program officer who can help during the application process?
- Who will read and score the applications?

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39

Sample Foundation WebPages



Home Page - Windows Internet Explorer
http://www.gkvf.org/

File Edit View Favorites Tools Help
Google | C | Search Web | Mail | My Yahoo! | NCAA Hoops | Fantasy Sports | Games

Home Page

How trust can touch...

The Greater Kanawha Valley Foundation
Charleston, West Virginia

[About the Foundation](#)
[Financial History](#)
[Become A Donor](#)

Celebrating over 40 years of
Community Service

40th Year Celebration
GKVF

Done start Grantwriting March 2... Home Page - Window... Internet 100% 10:14 AM

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40

Sample Paid Service to Research Grants



GrantStation.com - Your Fast Track to Funding

Ready, Set, GROW! GrantStation's Sizzling Summer Sale

Summer sale prices:

- \$219 for one year
- \$399 for two years
- \$550 for three years

So what are you waiting for?
[Join GrantStation Today](#)

Member Login

Username:

Password:

[Login](#)

Forgot your account?

Online Education

- Webinars at U.S. International Food Service (8/23/11)
- How to Secure Funding From Foundations (8/23/11)
- The Fundamentals of Competitive Grant Writing (8/23/11)
- FREE Tour of the GrantStation System (8/24/11)
- How Good a Grant... How Much? (8/25/11)

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41

Questions and Evaluation



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42