Grantwriting Basics for West Virginia School Based Health Centers

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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)**

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**

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**

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**

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 …

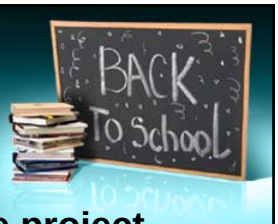
Attached is the Project Request for $25,000 to provide an outreach program to clients in our program about diabetes prevention…

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)

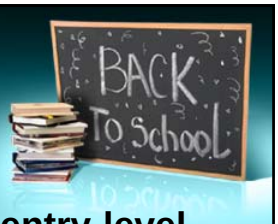
- **What is the Problem**
- **What is the Solution**
- **Funding Requirements**
- **Timelines**
- **Organization and its expertise**
- **Costs and support**

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)

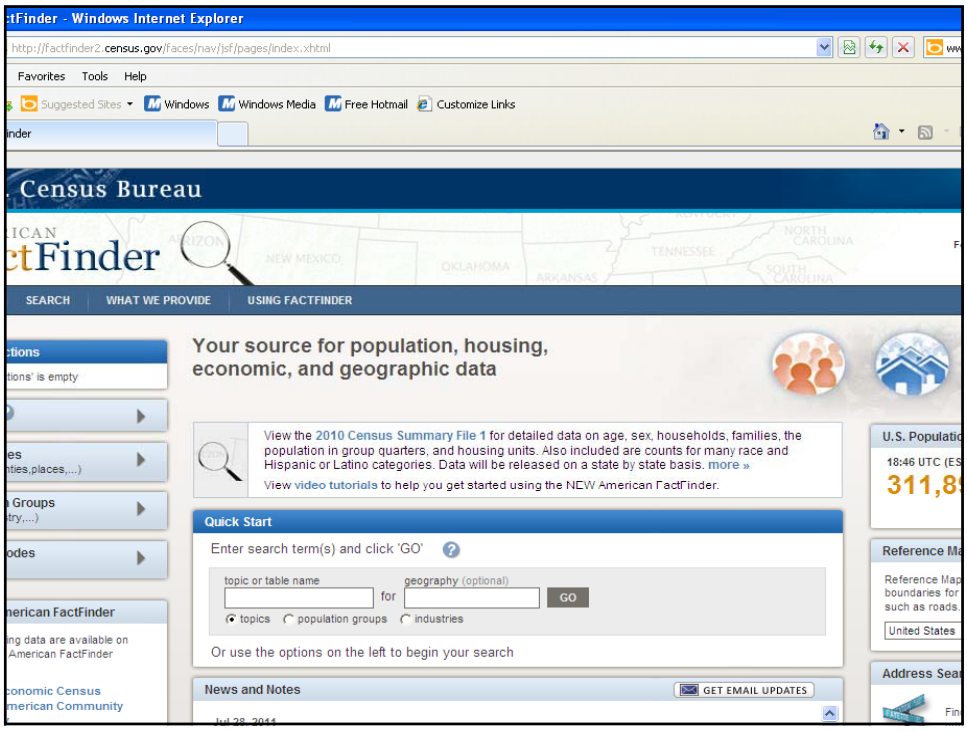
- **IRS Letter of Determination (501c3)**
- **Financial Information (include as needed – operating budget, audit, 990, list of past and current fiscal year foundation/corporate funders and gift level)**
- **Resumes (when appropriate)**
- **Do not add additional materials unless they are requested by 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)**

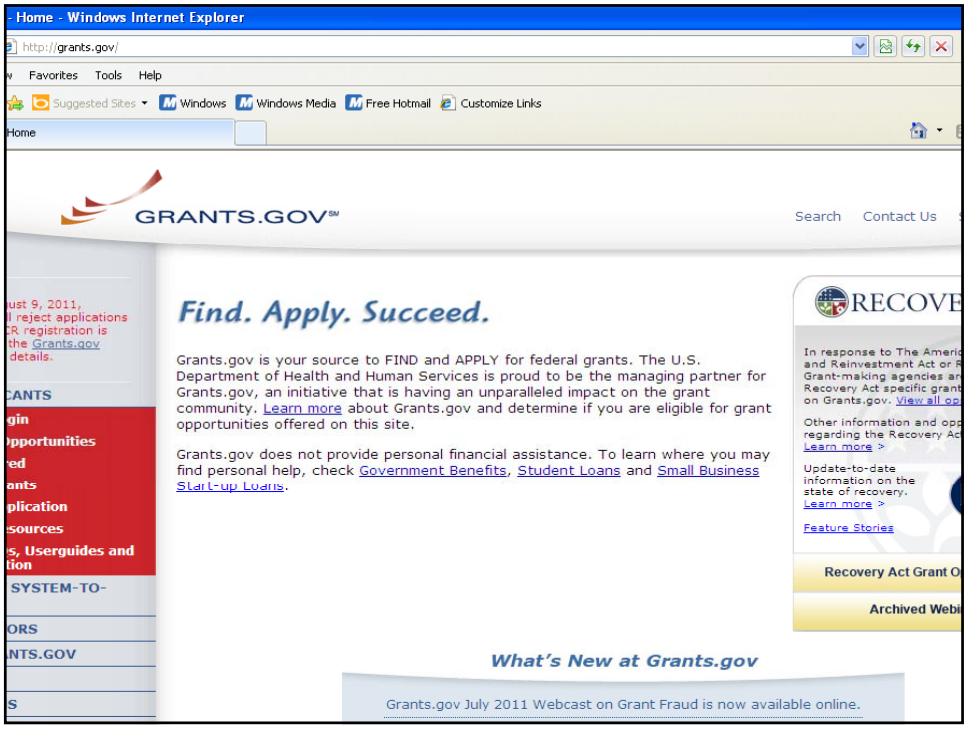
Web Resources

- **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)

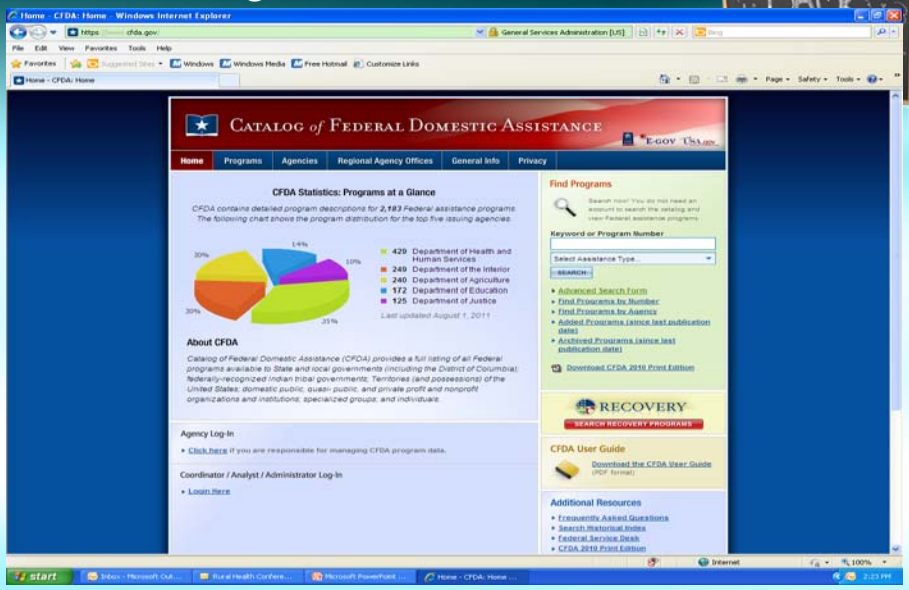




Federal Grants

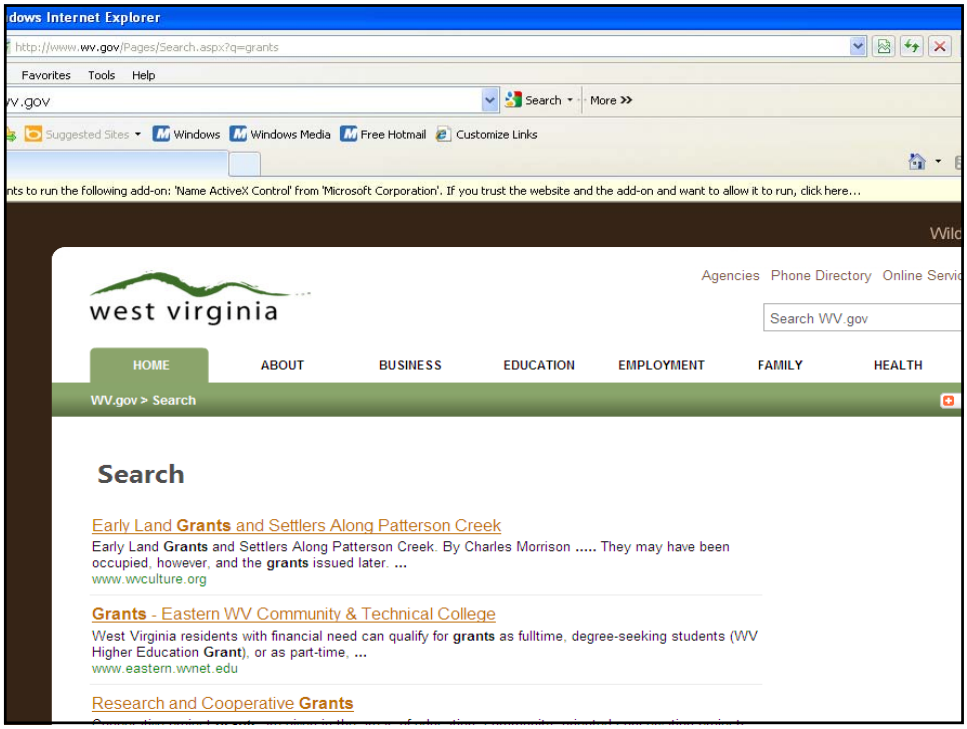
- Catalog of Federal Domestic Assistance
- http://www.cfda.gov/
- www.grants.gov
- Federal Register
- **Federal Grants Clock**
- **Federal Checklist**
- **Intent to Apply**
- **Bidders Conferences, FAQs, and Technical Assistance calls**

Federal grants



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)?


dows Internet Explorer
http://www.wv.gov/Pages/Search.aspx?q=grants
Favorites Tools Help
Search More
Suggested Sites Windows Windows Media Free Hotmail Customize Links
west virginia
Agencies Phone Directory
Search WV.gov
HOME ABOUT BUSINESS EDUCATION EMPLOYMENT FAMILY HEALTH
WV.gov > Search
Search
Early Land Grants and Settlers Along Patterson Creek
Early Land Grants and Settlers Along Patterson Creek. By Charles Morrison ..... They may have been occupied, however, and the grants issued later. ...
www.wvculture.org
Grants - Eastern WV Community & Technical College
West Virginia residents with financial need can qualify for grants as fulltime, degree-seeking students (WV Higher Education Grant), or as part-time, ...
www.eastern.wvnet.edu
Research and Cooperative Grants

Funding Sources
BACK
To School
• 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.
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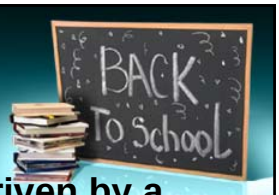
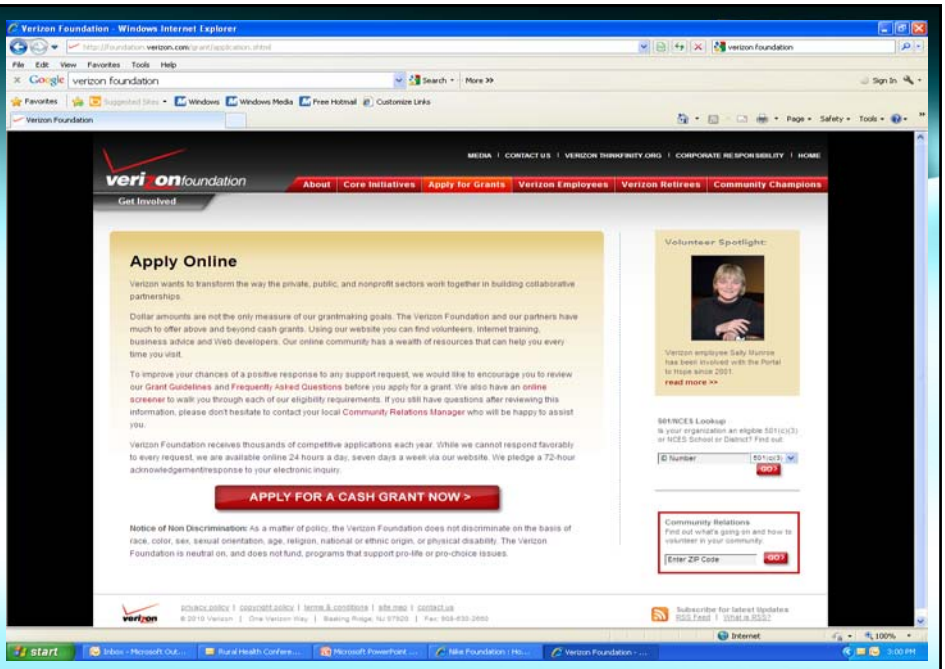
Corporate Grants



- **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?**



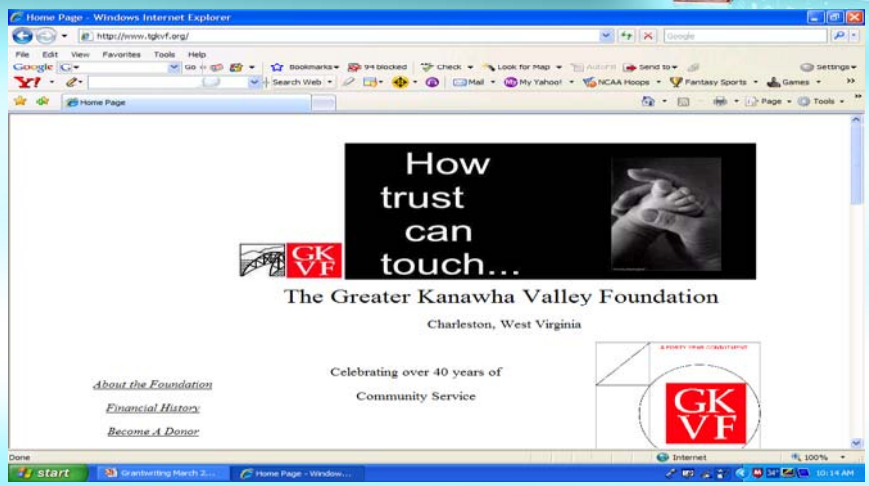
Funding Sources

- **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.**

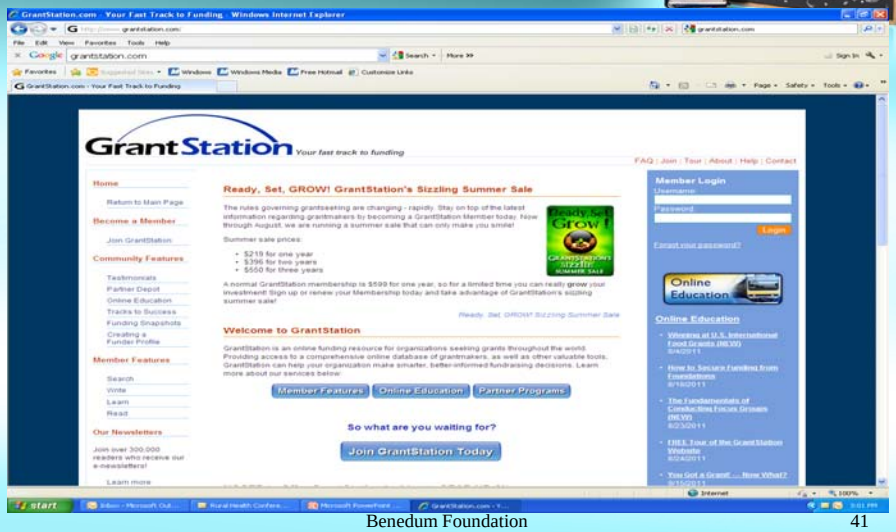
Foundation Grants

- **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?**

Sample Foundation WebPages



Sample Paid Service to Research Grants



Questions and Evaluation

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