Grant Writing: A Funder's Perspective

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Introduction

Goals

- Gain insight into the perspective of funders and what is valued most when making funding decisions
- Gain a sense of how to align your organization's mission, vision, values, and capacity with funding requests

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The Grant Application

Finding Appropriate Funding Sources

- ## Check website for mission and priority areas
  - Lead-specific funders
    - Foundations with lead-focused or environmental justice missions
  - Health-focused funders
    - Foundations focused on preventative health or public health interventions
  - Community Foundations
    - Foundations focused on a particular geographical area
  - Also look at annual reports for previous grants

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Engage the Grantmaker

- ## BE PROACTIVE.
    - Program staff will let you know if you're in the right place and/or on the right track
    - Many grant makers provide reactive grants
        - We don't know you need funding until you tell us – so tell us!
    - Email, call, text

Why else is this important?

Engage the Grantmaker

- <u>Every grant maker is different.</u>
  - Process
    - Deadlines
    - Submission Requirements
    - Funding types
  - Timelines
    - Cadence of funding decisions
    - Grant/Fiscal years
  - Level of Board Engagement

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Grant Guidelines and Requirements

- Grant guidelines and requirements will tell you a lot about what grant makers are looking for
    - Grant application sections like "Workplan", "Sustainability", or "Evaluation" will indicate that the funder is seeking a strategy for those subjects (We ask for all three.)
    - Requiring Board and audit information indicate that there will be a focus on secondary oversight or engagement
    - Asking for letters of support indicates that the funder wants to know that a supportive network of partners exists

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Developing a Project Plan

- If your organization/project is a fit, create a project plan that addresses priorities and expectations as closely aligned with the funders priorities as possible
  - Begin with a goal – or where you want to be at the end of the project/grant period
  - Identify objectives that you will have to complete in order to meet that goal
  - If you have multiple identifiable goals, repeat this process

- <u>NOTE: Do not attempt to do too much!</u>
  - Program staff and Boards will examine your organization's capacity and become skeptical

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Developing a Project Plan
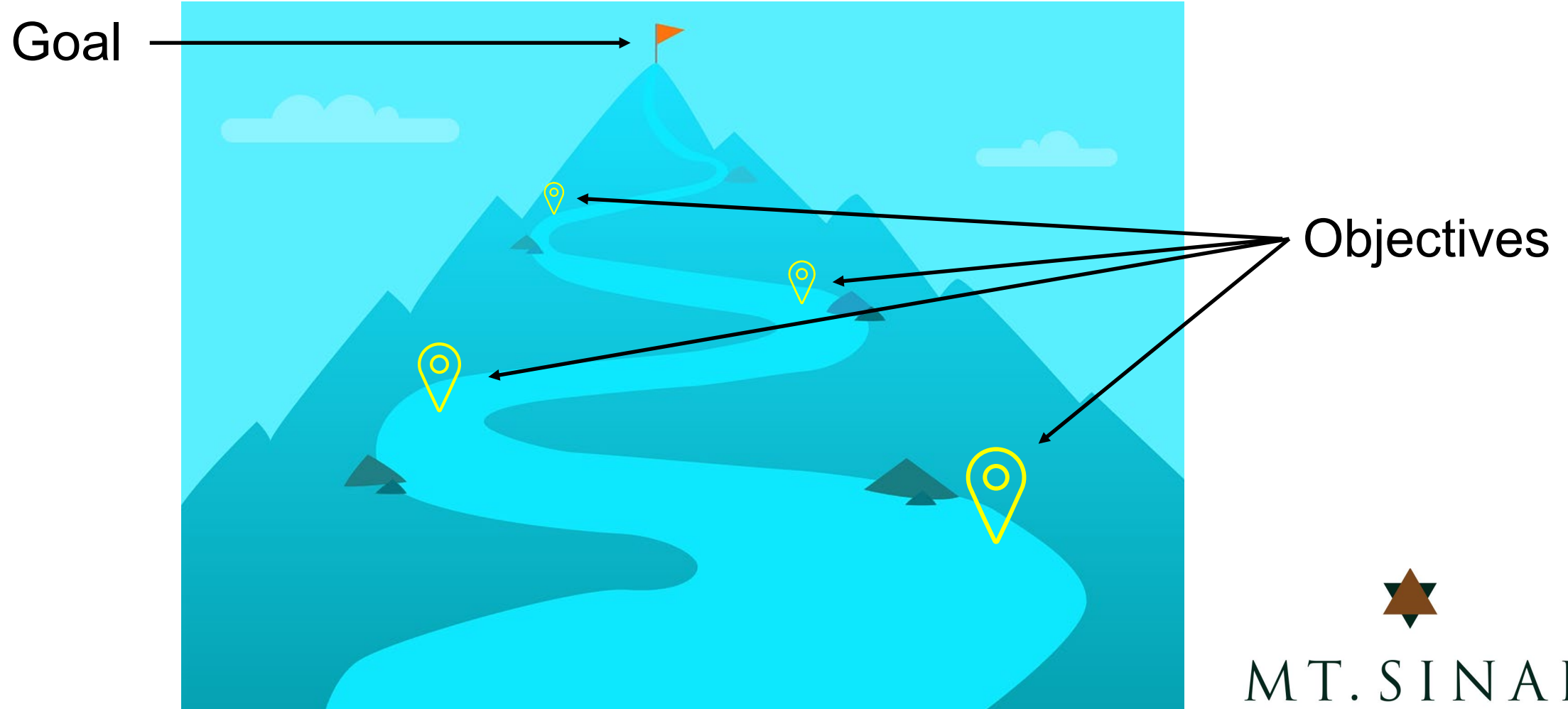
Writing the Proposal

- Use CLEAR and CONCISE language
- Create a narrative that ties your expected impact to each of your goals in your project plan
- Tie your definition of success to meeting the defined objectives
- Address how you will self-evaluate
- Discuss current AND future funding needs with an eye on sustainability

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Submitting the Proposal

- Leave enough time to review your proposal
- If you can help it, do not leave any section blank
- Submit the proposal by the deadline
- Follow-up with the program staff if submitting to an online portal or by mail

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The Funder's Process

Funding Decision-Making

- Program staff review proposals
  - Often will invite potential grantees to site visits
- Recommendations are made to the Board
- Board approves, declines, or defers a funding decision

What are program staff and Boards looking for?

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Funding Decision-Making

- Program staff wish list
  - Clear narrative that describes the problem, what your organization and/or program will do about the problem, and how much it will cost
  - An illustrated capacity to execute the program
  - A clear link to the funder's mission or to at least one of their priority areas
  - Either a unique approach to solving a problem OR a program with a large network of partners all working toward the same goal

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Funding Decision-Making

- ## The Board represents donors and/or institutions that created the foundation's corpus

- ## Board wish list

  - A probable impact made by an organization or program
  - An organization with a stable infrastructure or one that can be made stable with the foundation's award
  - Organizations with an eye toward sustainability
    - Most funders cannot fund the majority of their grantees into perpetuity

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Funding Decision-Making

- Considerations:
  - Your organization's size and capacity
  - Programmatic vs. Operating Funds
  - Foundation size
    - Funds
    - Staff
  - Board makeup
    - Who makes up the funder's Board? Where else are they involved?

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The Grantee-Funder Relationship

Role of the Grantee

- Keep track of program metrics/objectives
- Maintain budget ledgers that outline expenditures from each funding source
- Maintain contact with program staff
- Prepare reports and submit them by deadlines

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Role of the Funder

- Provide advice, assistance as it relates to program/budget issues
- Connect grantees to grant-making partners and other important community partners (government, private industry, etc.)
- Monitor grant progress
- Review interim/final grant reports and provide feedback

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Role of the Board

- Act as steward for donor funds
- Guide the foundation's leadership, based on the mission, vision, and values of the organization
- Monitor the fiscal health of the organization
- Act as a community liaison for the Foundation
- Develop the Board and maintain good leadership into perpetuity

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Key Terms

- Capacity
  - The ability to apply resources to achieve stated goals and meet funder expectations
- Evaluation
  - The process of collecting and presenting program data as a means of providing accountability for awarded funds
- Priorities
  - Areas of a funder's focus that allow it to maintain accountability to its donors by achieving the impact outlined in its mission, vision, and values.

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Thank You!

Questions?

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