Grant Writing Tips

When explicit application guidelines are published by the foundation, carefully follow the instructions. If outlines or a series of questions are provided, follow the indicated order, answer each section, and avoid evasive language.

Before mailing, ask a co-worker to help you double check that every required attachment is included.

Do not send the same generic boilerplate proposal to a random list of foundations. Always tailor the proposal and the specific budget request based on extensive research into the foundation’s priorities.

Use declarative rather than conditional verbs. Avoid the words *if, could,* and *might*. Instead, boldly declare that the gift ***will*** create a positive outcome.

Shorter is better. Keep your prose tight and the details condensed. Never exceed the recommended page length or fiddle with margins to squeeze in more words. Foundation officers are buried in paperwork, so make your proposal an easy read.

Document the “need” or “problem” on multiple levels. If space allows, provide a recent national statistic with the source identified by name or title and date. Next provide a statistic related to your geographic region or town. Finally, summarize internal data to show how many participants are helped or services are provided by your organization. Thinking ahead, your organization should develop a system for documenting unmet needs, such as the number of monthly referrals that must be turned away due to current facility limitations.

When submitting a proposal to a corporation, use language describing an investment, rather than a gift. Be more explicit on the benefits for the company, such as visibility through press releases or naming opportunities.

Baby boomers also prefer viewing their philanthropy as an investment, instead of a gift. Especially when submitting a proposal to a new foundation created by a high-tech millionaire, emphasize the long-term payoffs from an initial grant investment, the ability to leverage additional funding, and the role of the grantmaker as a valued partner in the project's operation.

Avoid dwelling on problems. Although proposals traditionally document the “need” for funding, make sure that the challenges do not sound insurmountable. Focus on opportunities that result from the challenges your organizations faces.

■ Establish the credentials of project leadership and the qualifications of the sponsoring organization.

■ Provide a realistic assessment of the urgency that drives your proposal submission. Is the unemployment rate dramatically increasingly in your community because of recent layoffs? Has the population of local wildlife declined rapidly due to creek pollution? Remember however that funders commonly require two months to one year to process grant applications. Your proposed timeline must reflect both the need for urgent action and the realities of anticipated funding cycles.

■ In *The "How To" Grants Manual*, author David Bauer distinguishes between reactive and proactive grantsmanship. The reactive mode involves developing a project first, hunting for funders, and then scrambling to meet a deadline. In contrast, proactive grantseeking begins with researching funders, matching their interests to possible projects, and then cultivating a relationship with the grantmaker. Be proactive by setting aside time for broad foundation research each week.

Tips for Grantwriting > Budget

- Focus on the cost-benefit ratio. Clarify how grant dollars will be maximized through a frugal budget, how the grant will leverage other funding, and how the benefits will be long-term.

- Budget line items should reflect the values of your organization. If working with special needs children, then the extra expense of adding a nurse practitioner to the staff can be justified. If working with drug addicts, then hiring individuals with first-hand experience for entry level positions might make more sense than staffing the project only with more expensive licensed therapists.

- Check for consistency between the project description, budget narration, and budget line items.

- Far too many organizations arbitrarily request an extra computer or half-time clerical assistant with every application submitted; foundations recognize these common tricks as unnecessary budget inflation.

- Aim for management efficiency. If your Executive Director position is already funded through a government contract, then five percent of this individual's time can be allocated for project oversight at no additional cost. Recruit a board member or local expert to donate training services or fiscal management services, then show this inkind contribution in the budget.

- If major pieces of equipment drive up total budget costs, investigate whether the equipment can reasonably shared with other nonprofit organizations or whether second-hand equipment would provide a reasonable substitute.

- Include an inflation factor and projected salary increases when applying for multi-year grants.

- Some grant experts recommend that budgets aim for no more than 40% personnel costs, with 60% for direct program support. Of course, this guideline does not always apply.

- For staff, identify the percentage of time that each individual will spend on this particular project and pro-rate the costs appropriate. Do not double-dip: If your case workers salary is 100% covered by the County Department of Mental Health, then a supplemental 20% of this position's salary cannot be charged to a different funder. However, the 20% contribution to this project can be shown as a County contribution to the project. In this case, a letter of support from the County would be a helpful supplement to your proposal.

- Calculate fringe benefits and payroll taxes on the exact cost percentage, based on information from your human resources department and the specific job classification. Remember that management positions sometimes include additional benefits, not available to other staff.

- Government funders will often allow the fair market value of furniture, computers, equipment, and a designated percentage of office space to be included as part of the required nonprofit financial match. However, this type of overhead cost is usually not appropriate for private foundations that prefer a designated cash match.

- Beware of including minimal costs for letterhead, postage, photocopying, and utilities, if not essential to project operations. The funder might perceive these expenses as part of normal operating costs and view relatively trivial line items as artificial budget inflation. However if your project involves public outreach with mass mailings, then nonprofit bulk rate postage and reasonable printing would be appropriate and significant budget items.

- Keep training costs reasonable. Many foundations are suspicious of overinflated figures in this category. If your staff has the capacity to perform the project activities, then why would extensive outside consultants and out-of-state seminar attendance be needed?

- Be cautious about including non-essential travel in the budget for a project that only has local impact. If conference attendance is of vital importance for project effectiveness or results disseminations, identify the conference and provide ample justification in the budget narration.

- Use only whole numbers (no cents) with proper formatting: $1,270 (not 1270).

- For pilot projects, a modest "contingency" line item might be appropriate, but allowed expenditures must be carefully defined and examples given.

- Do not include a "miscellaneous" budget category. Small expenses should properly be allocated for supplies, transportation, photocopying, or a similarly appropriate category.

Tips for Grantwriting > Attachments

- Funders are increasingly limiting the number of allowed attachments. Check for restrictions and do not include unnecessary material.

- For complex proposals without attachment restrictions, a careful selection of the following material might be appropriate: proof of nonprofit status, organizational brochure, newsletter, annual report, audited financial statement, relevant journal article, press clippings, statistical report that documents need, letters of support, subcontractor agreements, partnership statements from cooperating agencies, pledge of financial support from funders giving matching or challenge grants, budget narrative, organization operating budget, resumes of key project personnel, board of directors roster, project advisory committee roster, sample of evaluation questionnaires, sample lesson plans, and detailed timeline.

- If the number of attachments is not limited within the funding guidelines, consider attaching resumes for key personnel, job descriptions for new project staff, and/or biographical statements for project consultants.

- For proposals over five pages, a table of contents is normally recommended. If you include extensive tables, graphs, or attachments, these items should also be listed with page numbers. If headings and subheadings are bold and logical, sometimes the table of contents can be bypassed, unless the proposal is longer than ten pages. Do not simply list "Appendix A" in the table of contents, but rather specify "Appendix A: Timeline for Outreach Project Implementation" or Appendix B: New York Times article entitled "Angel's Unlimited Food Program Expands."

- When including a roster of your Board of Directors, respect privacy by NOT including each member's home address and phone number. Instead ask one board member to be a desigated contact person for this proposal and provide the individual's contact information. Do indicate the professional occupation, job title, civic affiliation, and/or corporate affiliation of each board member. Because the board roster is normally an attachment without page number restrictions, include a brief bio for each board member, that describes their professional accomplishments and their contributions to your agency.

Tips for Grantwriting > Funder Cultivation

- Mail a thank you note, even if the application is not funded. Express your appreciation for the funder's time during the review process and your admiration for the funder's philanthropic priorities.

- If funding is not approved, send a polite letter requesting reviewer comments and suggestions for future submissions. Be aware that many foundations no longer have time or staff resources to provide personal feedback.

- Foundation cultivation requires more than a minimal report at the end of a funding cycle. Send regular updates with meaningful information about the project's accomplishments and extend a handwritten invitation to visit your facility.

- "People give to people" is the classic slogan of fundraising. Personal contact with a funder increases the likelihood of success.

- After receiving a positive response to your letter of inquiry and an invitation to submit a full proposal, consider setting up a meeting or telephone conference with the Foundation's Executive Director or Program Officer. Review your research notes first to see whether this type of interaction is specifically encouraged or discouraged. Be ready with specific questions based on your careful review of submission guidelines, your proposed budget line items, and the details of your project implementation plan. This discussion with the foundation can lead to excellent feedback on such points as timelines, evaluation expectations, and allowed expenditures.