



Preparing Winning Grants

Presented by Judith M. Herr



Introductions/Inventory

Steps Toward Winning a Grant

- Evaluate Idea. “First Questions First” Exercise
- Granting Agencies. “Finding Funders” Exercise
- Get Ready: Writers, Cheerleaders, Win Themes. “Win Themes & the ‘Cause’” Exercise
- Writing & Reviewing. “Common Applications” Exercise
- Follow-up and Lessons Learned

All you need is a brain, a heart, and courage



3

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About me



- **President, Well Chosen Words**
- **15+ years managing proposals**
- **Fellow, STC**
- **Director of Fund-Raising, Amer. Cancer Society, SF Bay Area**
- **Training Director, Hotel DIEU, NOLA**
- **Masters in Public Health, Tulane University**

4

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Grant Writing is broadening...

“Whether providing professional consultative services for the entire process; contracting to provide research, writing, editing, and production expertise; or giving pro bono time for a personal cause, grant writing is career broadening – and even more rewarding when the grant is a winner!”

5

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Steps Toward Winning: “Writing is only part of the effort”

- Step 1: Evaluate idea & ability to implement**
- Step 2: Find “Best Fit Funder”**
- Step 3: Get Ready: Writer, cheerleaders, win themes**
- Step 4: Draft, revise, rewrite, review, submit**
- Step 5: Follow through**

6

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Step 1: Evaluate the idea & ability to implement

- Develop short summary of project – develop materials to tell the story
- Write need statement – why this project?
- Determine if your organization can accomplish the project – why us?
- Look at anticipated benefits against rough estimate of costs – is it worth doing?

7

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Telling the story – pictures help



- Sponsor: Cooperative Extension USDA
- Goal: Develop citizenship leadership, life skills through experiential learning programs. ...
- 4-H = Head, Heart, Health, Hands

8

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Demo Work in Plaquemines: “Arise and Rebuild”



9

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System architects & inner city students trade insights



10

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Supporting the national effort requires investment in training



11

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Exercise: “First Questions First”

1. What is the value of your idea? Does it capture interest?
2. Does the project solve an important problem? Who does it benefit?
3. Is solution timely, innovative, engaging?
4. Can your organization realistically do it?
5. Do the results justify the cost?

12

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Step 2: Find the “Best Fit Funder”

“The secret to writing successful grant proposals these days is being connected – not to insiders at funding agencies, but to people in your own organization and to resources on the Web.”

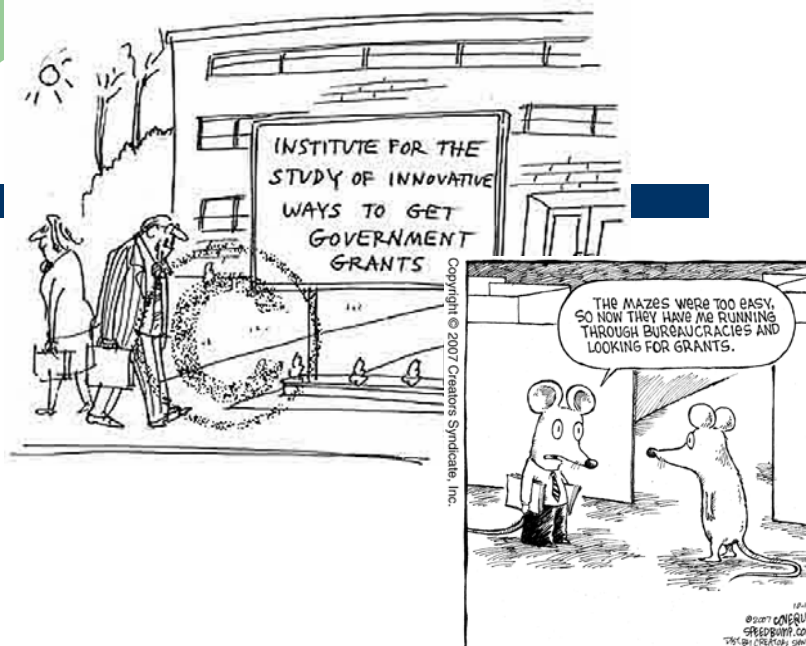
Steven Wilbers

And, don't fall for scam artists – you shouldn't have to pay to apply!

13

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14

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Targeted Search: Show Me the Money

The Internet – some of many out there...

- GrantStation Online
- Foundation Center Directory Online
- Univ. of Wisconsin, Grants Info Center
- National Science Foundation

Offline Research Too -- People

- Network: clients, vendors, neighbors, peers
- Volunteers invested in the cause or mission

15

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Surfing Exercise: Foundation Center Directory Online

- *“Updated weekly, The Foundation Directory Online is your best resource for comprehensive, accurate information on grantmakers and their grants”*
- During business hours, call Foundation Center (1-800-424-9836) for 24-hour trial
http://foundationcenter.org/marketplace/catalog/product_fdo.jhtml?id=prod20002
See also, Foundation Center, *“Prospect Worksheet”* – Attachment 1

16

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Foundation Center Database



FOUNDATION DIRECTORY ONLINE

https://fsecure.fdncenter.org/fdo_signup_prof/register.php?setplan=starr

Plan Features	Basic	Plus	Premium	Platinum	Professional
Complete profiles of the top 10,000 U.S. foundations including trustees, officers, and donors	✓	✓	✓	✓	✓
Daily philanthropy news and RFPs	✓	✓	✓	✓	✓
Multiple search options including keyword search and Boolean operators	✓	✓	✓	✓	✓
Descriptions of more than one million recent grants		✓	✓	✓	✓
Complete profiles of the top 20,000 U.S. foundations including trustees, officers, and donors			✓	✓	✓
Over 91,000 detailed profiles of all current U.S. grantmakers including trustees, officers, and donors				✓	✓
Profiles of more than 9,500 grantmaking public charities and nearly 1,400 corporate giving programs				✓	✓
'Search 990s' and 'Search Companies' capability					✓
Recent news, jobs, and RFPs; publications; and key staff					✓

17

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Step 3: Get Ready: Writers, Cheerleaders, Win Themes

- Build supporter excitement – brainstorm “win themes”; dream winning
- Gain visibility – newsletters; events; PR
- Seek opportunities to communicate with potential Funder – recruit an Advocate
- Recruit proposal team; prepare schedule; draft annotated outline
- Hold kickoff meeting; make assignments

18

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Exercise – Win Themes and the Cause

Write 3 sentences on why your project should be funded – why it's worthy; why the right people will be doing the work; who/what will benefit?

Write 3 sentences explaining why your organization can be trusted. Its track record for achievement. Worthiness of the cause/mission.

Gently explain how this project is different from work other groups in your region are doing on similar issues – and how you could collaborate with them

19

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Step 4: Draft, revise, rewrite, review, submit the proposal content

Completed application

Cover letter

Executive Summary

Narrative

Budget

Supporting Material

Narrative

- Statement of need
- Approach
- Method of Evaluation
- Project Timeline
- Key Personnel quals
- Why Us – the hook to the Funder

20

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Exercise: Minnesota Common Grant Application Form

Minnesota Common Grant Application Form

1. Cover sheet
2. Proposal narrative
3. Standard format for organization budget
4. Standard format for project budget

<http://www.mcf.org/mcf/grant/applicat.htm#Form>

See also,

Wisconsin Common Grant App. Form

21

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Step 4: Hints for getting the grant proposal out the door on time

- Emphasize firm deadlines for completion
- Establish team communication processes
- Add graphics, tables, design elements to illustrate text, re-enforce win themes
- Monitor and enforce version control
- Draft profiles for proposed project manager and key personnel early

22

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More Hints – Out the Door

- Prepare final draft in approved format
- Prepare cover letter for signature
- Arrange for detailed edit of final text
- Perfect final graphics
- Test print final version – even if to be delivered electronically – they will print it
- Arrange for delivery per grant instructions

23

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Step 5: Follow through

Waiting for the Verdict

- Rejection?
- Request feedback
- Acceptance? **CELEBRATE!!!**
- Thanks to Donor; publicly recognize the Gift
- The next grant?



24

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My Top 10 List of “Lessons Learned”

1. Connect with funder’s program officer – inquiry letters; telephone; Board’s contacts
2. Follow all grant instructions exactly; continuously update compliance checklist
3. Line up all resources before plunging in
4. Keep proposal team happy & well fed
5. Collect 24X7 contact information

25

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Proposal Team at Work: Virtual Too



26

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My Top 10 List of “Lessons Learned” (cont.)

6. Identify the project’s proposed staff early
7. Edit continuously; accept substantial changes graciously or at least tactfully
8. Know when it’s time to give up perfection for “good enough”
9. When scheduling, inflate time required for production and delivery
10. Recruit “good” Review Team leader

27

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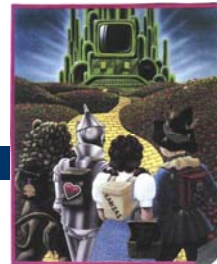
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Setting out ...

Before beginning a long and arduous journey...

- The prudent traveler
- The less meticulous traveler
- The desperate traveler – bold, vulnerable, and determined

Even the Stars Look Lonesome, Maya Angelou



28

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*You have a brain , a heart, and courage
my friends -- and the expertise*



29

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30

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Comments, suggestions, follow-up questions?

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31

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32