



Grant Success in 8 Steps

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Foundation Funding Update

- Grants have become a stable part of overall contributions and steadily increasing.

- USA Giving Report 2022 Highlights

All Contributions = **\$499.33 Billion:**

Individuals = \$319.04 Billion (64%)

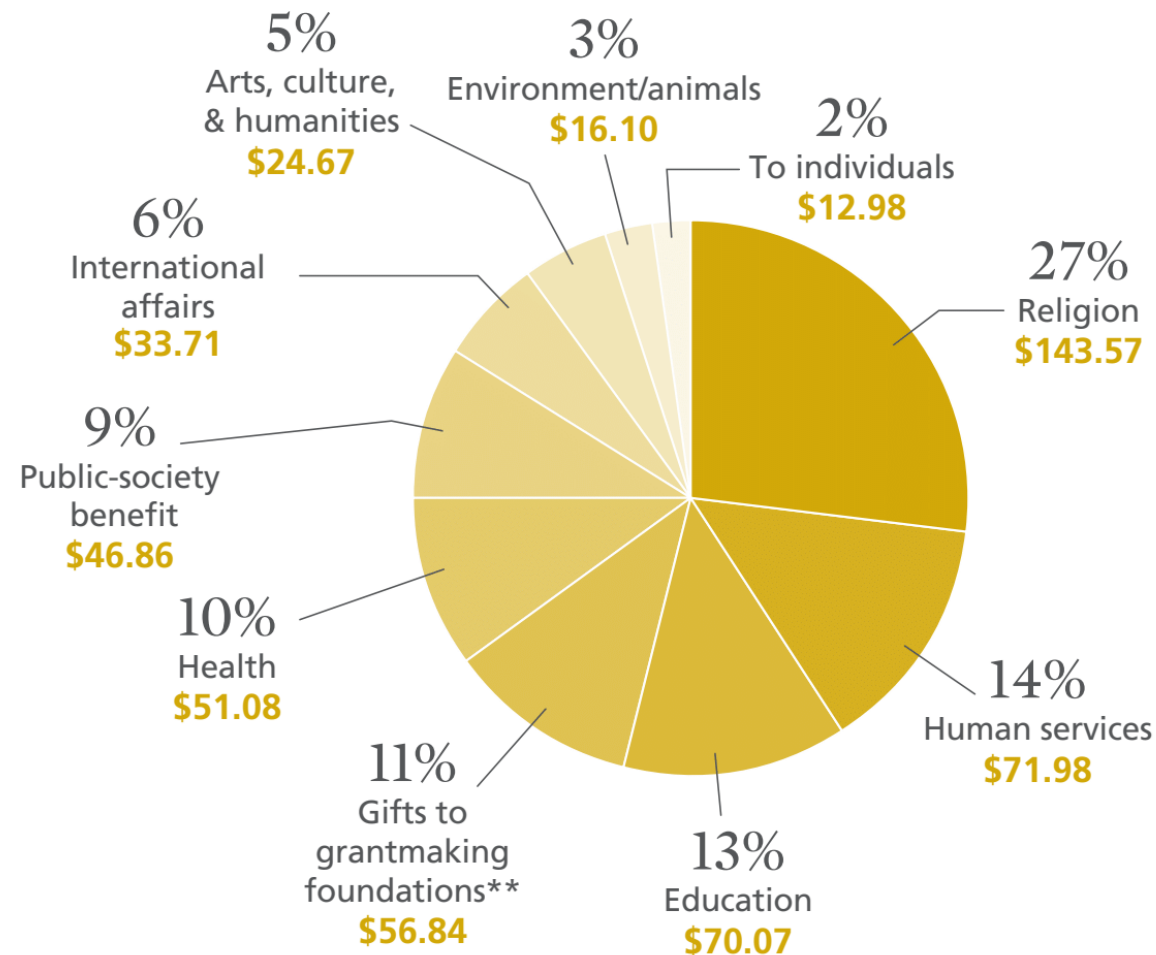
Foundations = \$105.21 Billion (21%)

Bequests = \$45.60 Billion (9%)

Corporations = \$29.48 Billion (6%)

2022 contributions: \$499.33 billion by type of recipient organization*

(in billions for dollars – all figures are rounded)



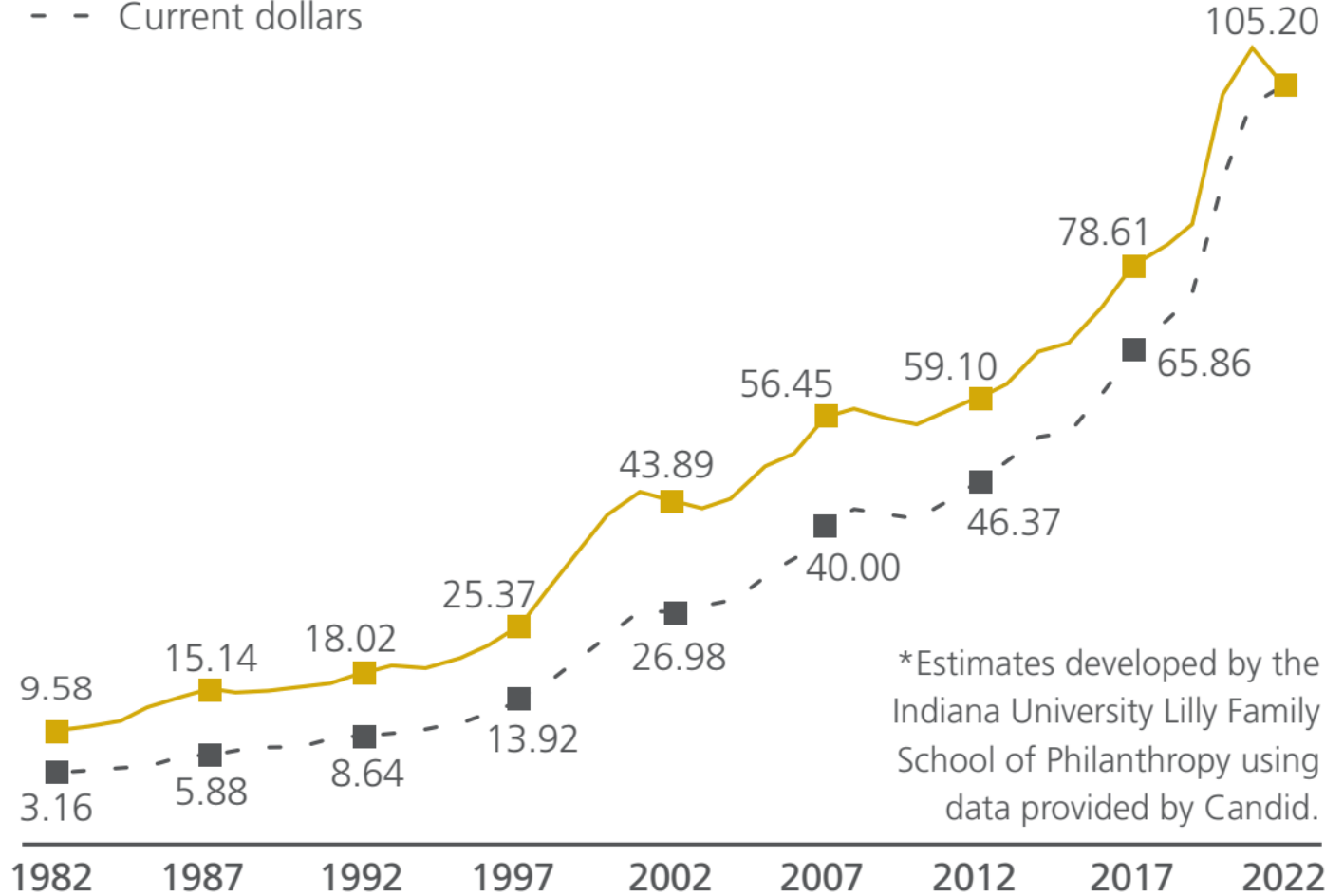
* Total includes unallocated giving, which totaled -\$28.54 billion in 2022.

** Estimates developed by the Indiana University Lilly Family School of Philanthropy using data provided by Candid.

Giving by foundations, 1982-2022

(in billions of dollars)

- Inflation-adjusted dollars
- - Current dollars



*Estimates developed by the Indiana University Lilly Family School of Philanthropy using data provided by Candid.

1. Create Capacity in your organization

- Gather important documents
- Follow Generally Accepted Accounting Practice (GAAP)
- Create a Grants Team including:
Executive Director (ED),
Chief Financial Officer (CFO),
Program Director (PD), and
Grant Professional (GP)



2. Grants Team Creates Needs Assessment:

- Why does your organization exist?
- What population /sector do you serve?
- What issues are you trying to address or solve?
- How does your programs address the issues?

2. Grants Team Creates Needs Assessment:

Continued:

- How much does it cost? Current Budget / Potential Budget
- Who is involved?
- What resources are needed for progress?
- How can you measure your progress?
- What outcomes do you expect?

Logic Model Example:

Organize the Needs Assessment into a Logic Model

INPUTS	ACTIVITIES	OUTPUTS	OUTCOMES	IMPACT
Population / Sector	Programs: trainings, recruitment, repetition	Measured Progress: how many / how often	Progress: per program per population	Change / Lessons over time
Place & Time	Resources needed	Number of participants	Progress over time	Long term solutions
Problem / Need	Funding needed	Resources used per program / quantitative	Results expected / qualitative	Needs met

3. Research for Funding & Tracking

Funding Sources:

- Foundation Center (Library Access)
- Instrumentl (Subscription)
- Grant Center
- Google
- Grants.gov
- State Funding announcements
- Community Foundations

Research for Funding & Tracking

Create a tracking document

- Name of funder
- Contact information & address
- Website /url,
- Grant cycle dates and focus
- Grant range
- Link to apply
- Notes on relationships
- Award / Decline
- Reports & Dates

Approval to seek a grant & app process roles:

- Opportunities? Through RFP's, Research, and Invites
- Who decides what to apply for?
- Grants team to meet regularly to review opportunities and approve the project to apply for using a grant tracking document, discussion, and grant rubric
- Roles and responsibilities are known
 - CFO – budget & itemized costs
 - ED / CEO – Authorized Organizational Rep
 - GP – copy writer and lead on application
 - PD – approval of case, needs assessment, and logic model
- Review process is pre-determined to submit early.

4. Making Contact

- Letter of Interest / Intent:
 - Who - Who are you?
 - Why - Why are you contacting the funder? (alignment)
 - What – What is the need? What is the solution?
 - Where – Place example city, community, culture, or school?
 - How – How will your solution work? Expected outcomes?
 - When – period of time expected, and when does this start and finish?

5. Grant Writing

- Application: Use the Logic Model to help answer the questions
- Follow directions and instructions
- Keep to character / word counts
- Be concise / realistic / timely
- Assume the reader knows nothing about your organization
- Thank them for their time and consideration

Reasons your grant application is denied:

Mistakes: (Top 10 provided by Write On Grants, July 2023)

10. Lacks outcomes: Quantitative & Qualitative
9. Lacks evaluation metrics: Inputs & Outputs
8. Overly ambitious in goals: Keep it realistic
7. Narrative assumes the reader knows the organization
6. Narrative reflects the grant will serve the organization and not the population in need
5. Overuse of jargon and acronyms
4. Careless editing
3. Incomplete answers and missing information
2. Budget errors
1. Not following application instructions

6. Waiting & Awards

- After submitting an application – make a note of date to hear an award announcement (or decline).
- If awarded the grant: THANK THE FUNDER FIRST!
- If a decline is noted: THANK THE FUNDER!
- Build a relationship with the funder
- Awarded: Follow directions and instructions for gift acceptance and guidelines on use of funds.
- Are you remembering Grants Ethics?

7. Management & 8. Reporting

- Involve the CFO and PD to track spending, and impacts, outcomes.
- Award Report: Prepare to make an annual or bi-annual report to the funder on use of funds. Mark your calendar.
- Award Report will usually ask for a budget update. Keep the CFO in the loop.
- Submit post-award reports on time, include invitation to visit organization, or include photos of impact.
- Return to Step 2: Grants Team meets

Grants in 8 Steps

Grants are an investment in an org./program by a funder to sustain or create change.

1. Create Capacity:
Must: have nonprofit status, and follow GAAP: (have separate accounts for income and expenses). Create a **Grants Team**: Exec. Director (ED), Chief Financial Officer (CFO), Program Director (PD) and Grant Professional (GP).

2. Grants Team Creates Needs Assessment (NA)

3. Research and Organize.
GP to research for funders to address NA. Create strategy and calendar to apply for funding

Finding Sources:
Foundation Center, Instrumentl, GuideStar, Grants Center, and Grants.gov

4. Write:
GP to respond to RFP, open applications, and tailor writing to meet the NA and funder's interest. Use Logic Model for needs assessment.

Logic Models help to organize a project's inputs, activities, outputs, and outcomes.

Create a LOI:
Letter of Introduction or Intent to be ready.

8. Report:
Grant Team reports to funder summarizing outcomes. Follow reporting guidelines. Use Logic Model for outcomes. Return to #2!

5. Apply:
Follow guidelines and deadlines! Involve Grants Team for editing and approval.

Applications may be as brief as an online form, or as complicated as 40 questions. Prepare and chart steps to submission. Always try to submit early.

ED and GP Build the relationship with the funder. Site visits, articles of accomplishments, notice of collaborations, etc.

7. Management:
CFO & PD to track spending. Note all grant spending and reporting requirements.

6. Awards:
Upon receipt of award (or decline), GP and ED thank the funder.

Annagreta Jacobson, GPC
For August 24, 2023

Questions?

- Thank you for joining today!