STATE OF WISCONSIN
DWD
Department of Workforce Development

Finding and Applying for Grants

Nancy Kargel, DWD grant administrator
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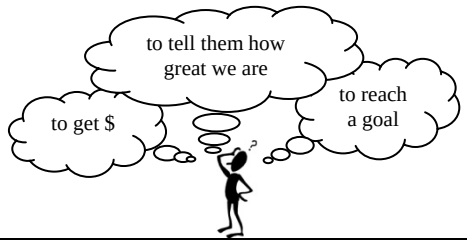
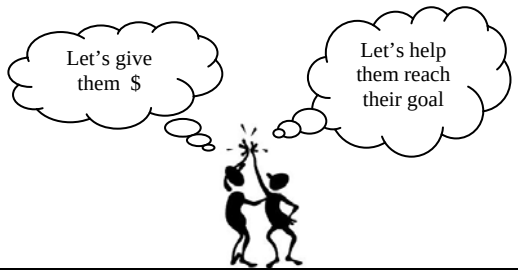
This workshop will cover the basics of finding grant opportunities and improving your grant proposals. You will leave this workshop with three things:

- ☑ a basic action plan based on your organization's needs
- ☑ a basic proposal quality checklist to use before you submit your next grant
- ☑ a list of resources for researching/finding grant opportunities.

Think about it

What is our organizations' goal? 	
What is the funder's goal? 	
Lesson: Don't confuse the tool with the goal.	

Activity 1: Order, Please!

Put the following tasks in the proper chronological order from first to be done to last. You may use the timeline below. Some tasks might be done more than once and at various times or for various reasons.

A. Set organization's priorities
B. Evaluate funded project
C. Send an invitation to funder for your organization's events
D. Provide updates/progress reports on the project to the funder
E. Send a thank you note
F. Write/review/reassess mission statement
G. Compile list of potential funding sources then research the options
H. Write the proposal
I. Disseminate/publicize results
J. Submit the proposal
K. Cultivate a relationship with the (potential) funder(s)
L. Identify goals
M. Request permission/guidance on submitting your proposal
N. Write a development plan (activities, projects, funding, etc.)

first last

Lesson: Stack the deck in favor of your project's success. Think the project through fully before taking action. Don't forget to follow through.

Pre-proposal tasks

Strategize (general planning)

Mission

Goals

Projects to be undertaken (prioritized in different ways: need, feasibility, time, etc.) Don't forget to ask why you want to take on these projects.

Available resources (not specific to a particular project) – traditional/non-traditional.

What we need (not specific to particular project) - tools, materials, equipment, cash, meeting places, volunteers, curriculum, expertise, technical assistance, evidence/research, ?????

How can we better conduct community outreach and make good use of media (social media, newspapers, service organizations, etc.)

Prepare (more specific planning)

Set up an electronic library that holds your organization's grant writing materials. Know the records retention requirements for various grant-related documents and build the requirements into your library filing system. (Federal grants will specify how long you must retain grant-related records. Public and private foundations should specify their expectations.)

Think about generations of leadership for your organization and what the next generation might need or find useful in addition to what you currently need. Build your library for ease in transitioning in new leaders.

Gather case stories that exemplify the impact of your organization on the student/client (pay attention to confidentiality and release of information requirements.) Retain in electronic library. These will be used in actual proposals with stories carefully selected for each proposal. Keep the library current.

Gather statistics about your organization (accuracy!)

Write a boilerplate that can be reused (update when needed). This is a brief, generic introduction that describes what you do, your mission, etc. but leaves out details of any proposed projects. Statistics can be included but case stories are not. The boilerplate provides the context for the proposal so that the donor can put the proposal into perspective based on the boilerplate.

Specify what types of organizations would be acceptable donors and what types would be unacceptable (pay attention to lobbyists, possible conflicts of interest, who else a donor might contribute to, etc. Think about possible media that could result if something went poorly for your organization or a donor.) Try to have your organization put in writing the limitations. Post in your library. Review periodically.

Create a calendar of events for your organization. Use the calendar to plan invitations to legislators, business leaders, etc. Include on the calendar local events to help ensure your organization's participation at festivals, etc. (dual purposes of community exposure and fundraising.) Consider making the calendar available to the public.

Establish your organization's communication goals. Who will you communicate with, using what media, how often, who will write the communications? This is your PR piece that will help build and maintain long-term relationships and build a core of "go to" options for your organization. Tie your communications goals to the calendar to help ensure that you share milestones externally.

Make a list of local people who/organizations that would be interested in your group's activities. Include state level and regional organizations, as well. Plan to reach out. Local service organizations are often interested in youth's academic achievements and the schools' programs. See if the service organizations would like your organization to present information at an upcoming meeting.

Activity 2: My Plan [name of project]

Task	Details / deadline	Who
Write or review boilerplate; update if outdated and/or revise the proposal if it needs to be different for this project		
Outline the project. Put a timeline to it. Determine a ballpark budget. Write a polished description of the project in the general format of a grant proposal. (Consult grant writing assistance – professional writers or free, online assistance if needed) This will be your base proposal. It will be tweaked for specific funding opportunities so that it adheres to each grantor's expectations.		
Identify <u>available</u> resources for this project (don't forget people!)		

Identify <u>needed</u> resources for this project		
Identify activities and non-grant assistance that should be engaged (media, presentations at service organizations, etc.)		
What type of grant(s) should we look for? ☐ Cash ☐ Donation ☐ Technical assistance ☐ Volunteers ☐ ? ☐ ?		
Resources for grants ☐ Grants.gov ☐ My own contacts ☐ Other people's contacts ☐ Foundation Center ☐ Other online ☐ Other non-online		

Common Reasons Proposals are Rejected

Organizational strategizing/boilerplate

Continued funding in doubt – sustainability

Prospect doesn't know your organization's capabilities

Donor Research

Goals don't match those of the prospect

Amount requested is out of the donor's range

Project Planning

Goals and objectives are too ambitious

Clients not involved in the planning

Project perceived as a duplication of service

Not perceived as "unique and innovative"

The need is unconvincing; doesn't fit community priorities

Written Product

Proposal poorly written, difficult to understand

Technical problems – guidelines not followed, missed deadline

Failed to “grab” the prospect

Too many assumptions and not enough facts

Evaluation

Goals and objectives are too vague – not enough “outcomes”

Evaluation process questioned

Reasons out of your control

Economy
Weather/disasters

(adapted from Boris Frank class, Wisconsin CPM Program, *Writing Effective Proposals*)

Some Words about Checklists

Checklists are like belly buttons. Everyone has one. Checklists vary in quality and usefulness and are highly dependent upon the organization using one, the projects being proposed, and the donors being tapped.

Here is some advice.

1. Go ahead and look for a checklist or develop your own.

2. Make sure that every time you apply for a grant, you ***refer to any checklists that the donor has***. These checklists should trump any templates you've found or created where differences exist.

3. Many checklists ignore very important steps, so ensure that your favorite checklist includes:

   Establish a timeline that includes all tasks needing to be completed. Be sure to allow buffer time in case your preferred method of submission fails (electronic submissions can be tricky, for instance.)

   Make a chart that includes content and mechanical requirements

   Assign these tasks and ensure that responsible people complete them (one person might fill more than one role):

   - Grant lead: responsible for the final proposal and the progress leading up to it. Ensures that the proposal supports the organization's mission statement and goals.
   - Funding researcher: is responsible for good fit between organization's project and potential funder(s.)
   - Editor/proofreader: should be someone not familiar with the organization or program – perhaps a neighbor or family member who is not in the same field of work as the organization. This person should check for content (no jargon used, text flows well, ideas are explained well, etc.) and also help with proofreading.
   - Grader: should be someone familiar with grants but not familiar with your project. This person will refer to the chart that includes content and mechanical requirements to ensure that the proposal follows the donor's requirements. This person will ensure that all content is provided in the appropriate section and that there is no duplication of content. If a rubric is provided, this person will grade the proposal based on the rubric.
   - Time keeper: should ensure that all timelines are being adhered to. If deadlines are not being met, this person notifies the grant lead and the people responsible for meeting the deadlines.

A Basic Pre-Submission Checklist

(Adapt as necessary to make it useful to your organization. This version was adapted from http://ezinearticles.com/?Grant-Writing-Help---Checklist-for-Successful-Proposals&id=4907712)

A Cover Letter
Executive Summary (also called an abstract)
Introduction
Program need/program statement
Program goals, objectives, and evaluation
Program budget and budget narrative
Leadership, staffing, and location
History of the organization
Addendums such as your 501(c)(3) letter and financial statements

Use this checklist after your proposal is complete to assess if you are ready to submit your grant:

1. Have multiple people proofread the proposal?
2. Have people not involved in the writing of the grant edited the proposal to confirm it is clear and understandable?
3. If a rubric was provided, has someone graded the proposal according to the rubric?
4. Does the proposal include background information that explains our organization and our capacity to follow through in completing the project?
5. Are the project's goals and objectives clear, realistic, practical, effective, measurable, and consistent with the goals of the funding organization and our organization?
6. Did we provide an effective statement of need, as seen through the ***donor's*** eyes?
7. Is the amount requested in the donor's range?
8. Is the population to be served clearly defined? Who? How many? Where?
9. Are the project activities specific?
10. Was every item in the application from the funder covered?
11. Were all the key points of the application's evaluation criteria met or addressed?
12. Were the directions from the funder or foundation followed? Has someone double- and triple-checked that all formatting expectations have been met (font size, page limits, margins, etc.) and method of submission is according to donor's preference?
13. Has every objective / goal been balanced with appropriate and useful evaluation?
14. Are statistics properly cited?
15. Are there adequate resources available to support the program after the grant is complete?
16. Have we included letters of support from other donors, board members, or stakeholders?
17. Have we included all other supporting documentation requested?
18. And last, but not least, is the finished document neat and eye pleasing? Are page breaks logical? Do we have supporting graphics (tables, charts) to break up the text?

Article Source: http://EzineArticles.com/4907712

Some Grant Writing Resources

Online Funding Opportunity Resources

The Foundation Center - www.foundationcenter.org includes grantors, access to Federal 990's, calendar of fee-based classes, listing of free web-based tutorials, etc. Access to the funder information is by subscription but the public may access all of the information through any of the libraries in its network. Free access is in-person only. We are fortunate because we have several of the cooperative libraries in WI - http://grantspace.org/Find-Us .
For training: http://grantspace.org/Classroom

UW Madison Grants Information Collection at Memorial Library provides in-person and free access to many subscription-based grant databases Including the Foundation Center. It also provides seminars that teach how to use the databases. The site includes a lot of support information beyond Foundation Center's services: http://grants.library.wisc.edu/

All federal government grants are posted on a single web site: www.grants.gov . You can sign up to receive alerts of new postings in specific areas, from specific departments, etc. Be sure to read about the requirements for submitting proposals for federal funds. See also http://www07.grants.gov/applicants/app_help_reso.jsp .

The Department of Labor – Employment and Training Administration is organized into Regions. WI is part of Region V. You can sign up to receive grant alerts from DOL-ETA.
http://www.doleta.gov/regions/reg05/Pages/r5eta_index.cfm?CFID=66444561&CFTOKEN=10641455

Other Online Resources

Is Your Non-Profit Ready to Apply for Foundation Grants?
http://nonprofit.about.com/od/foundationfundinggrants/a/Is-Your-Nonprofit-Ready-To-Apply-For-Foundation-Grants-10-Questions-To-Ask.htm

Applying for [Dept of Labor] ETA Competitive Grants (guide for small organizations new to applying for federal grants) https://www.workforce3one.org/ws/www/pages/grants_toolkit.aspx?pparams=

Wisconsin Department of Workforce Development's WORK Net (access to demographics, statistics, etc.) http://worknet.wisconsin.gov/worknet/default.aspx

Scholastic Grant Seminar (free) at http://teacher.scholastic.com/professional/grants/devstate.htm

The Components of a Grant Proposal – Center for Participatory Change
http://www.cpcwnc.org/resources/toolbox/the-components-of-a-grant-proposal

Matching Evaluation to Your Project and Organization
http://www.grantsnorthwest.com/matching-evaluation-to-your-project-and-organization/

If you think your consortium could use some organizational help (self-assessment) to better identify its strengths and challenges, get some experience in gathering and processing data for evaluations, etc. see *A Practical Guide for Program Assessment and Action Planning*
http://fyi.uwex.edu/youthadultpartnership/files/2012/03/Complete-YALPE-Kit-with-Appendices.pdf