

Effective Grant Writing: Increasing Your Chances of Success

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I. Grant Writing 101

- Why grants?
- Know one, know them all?
- What does it take?

II. Setting Yourself Up for Success

- Building the right team
- Choosing the right grants
- Establishing effective procedures, templates and workflows

III. Measuring Effectiveness

- What influences success?
- Common Metrics

IV. Five Tips to Maximize Success

V. Templates and Resources

WHY GRANTS?

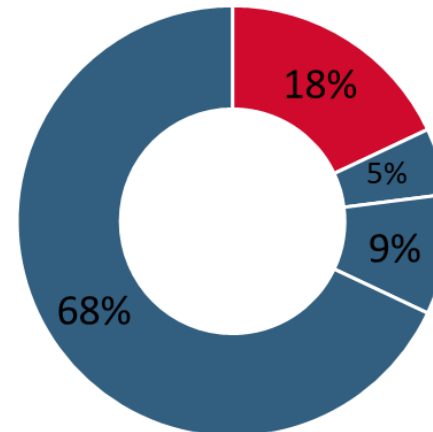
- **\$700 billion** invested in the US each year through more than 1,800 diverse federal grant programs - *grants.gov*
- **\$76 billion** in foundation giving in 2018 - *Giving USA*:
 - Record-breaking year
 - Includes corporate foundations
 - Highest dollar amount even when adjusted for inflation
 - **7.3%** increase from prior year
 - **18%** of total giving to charities, largest share to date
- **\$20 billion** in corporate giving:
 - **5.4%** increase from previous year
 - **5%** of total giving to charities

WHY GRANTS?

Giving by Source

Giving USA - 2018 Data

- Foundation Giving: 18% (\$75.9B)
- Corporate Giving: 5% (\$20B)
- Bequest Giving: 9% (\$39.7B)
- Individual Giving: 68% (\$292B)



WHAT IS A “GRANT?”

Grant: Funds disbursed to a recipient or organization by a government agency, foundation, or corporation to support a specific project.

- *Does not need to be repaid – unless not used or if used in manner inconsistent with intent and applicable regulations*

TYPES OF GRANTS

1. FOUNDATIONS:

— Private foundations:

- Financially supported by one or a handful of sources
- Includes:
 - Independent Foundations
 - Individual and Family Foundations
 - Corporate Foundations

— Public foundations

- Defined as public charities by the IRS
- Supported by a variety of sources, which may include other foundations, individuals, corporations, etc.
- Includes:
 - Community Foundations

TYPES OF GRANTS – CONT.

2. GOVERNMENT AGENCIES

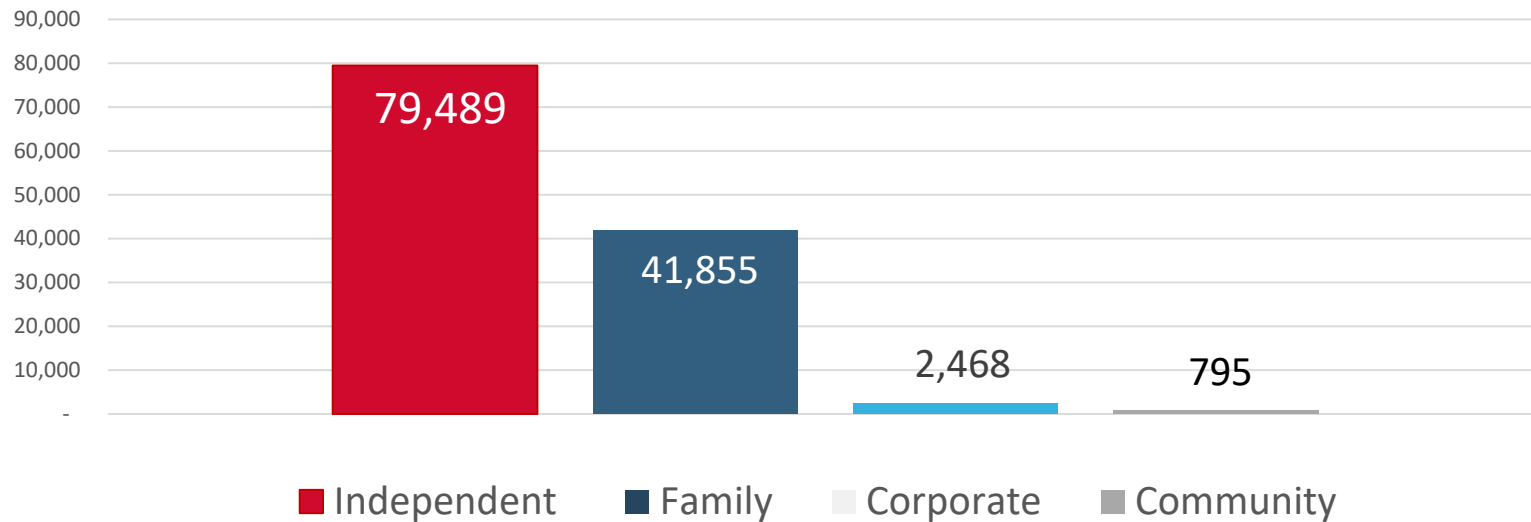
- **Federal**: benefit state and local governments, universities, researchers, law enforcement, organizations, and institutions planning major projects that will benefit specific parts of the population or the community as a whole – usa.gov
- **State**: benefit local government agencies, universities, researchers, law enforcement, non-profit organizations, and other organizations serving the geographic area.
- **Local**: provided by cities, counties, etc. to benefit non-profit and other organizations serving community.

3. OTHER GRANT SOURCES

- Corporate giving programs; religious organizations; the United Way; donor-advised funds (DAF); civic organizations; and tribal funds.

FOUNDATION TYPES

US Foundations by Type 2015



Source: Foundation Center

KNOW ONE, KNOW THEM ALL?

DIFFERENCES exist in many areas including:

- Priorities for Funding
- Giving Ranges
- Application and Evaluation Process
- Unrestricted vs. Restricted Funding
- Indirect Costs
- Complexity and Time to Prepare
- Importance of Relationships
- Reporting Requirements

TRUTH or MYTH?

#1. Ask (for just about anything) and you shall receive...

TRUTH or MYTH?

#1. Ask (for just about anything) and you shall receive...

MYTH

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#2 - All we need is a new 501 ©3 and a couple of big grants to start our dream project.

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#3 - Federal grants for individuals?

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TRUTH or MYTH?

#4 – You should ignore foundations that make grants “by invitation only.”

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MYTH

TRUTH or MYTH?

#6 - Federal grants to help people start a business?

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#6 - Federal grants to help people start a business?

MYTH *however....grants available to:*

- Small businesses who are engaged in scientific research and development: under the Small Business Innovation Research (SBIR) and the Small Business Technology Transfer (STTR) programs.
- State and territory governments in order to help small businesses with export development.

WHAT DOES IT TAKE?

Pre-Award Tasks:

1. Collaborate with team to identify and prioritize needs

WHAT DOES IT TAKE?

Pre-Award Tasks: (cont.)

2. Research funding opportunities that meet identified needs

WHAT DOES IT TAKE?

Pre-Award Tasks: (cont.)

3. Develop and maintain grant opportunity calendar

WHAT DOES IT TAKE?

Pre-Award Tasks: (cont.)

4. Prepare Funding Opportunity Summary (FOS) – handout

WHAT DOES IT TAKE?

Pre-Award Tasks: (cont.)

5. Engage finance and accounting team in better understanding and evaluating financial conditions and implications of award

WHAT DOES IT TAKE?

Pre-Award Tasks: (cont.)

6. Engage management and executive team in decision-making– Grant Decision Matrix (*Go/No-Go*) and Grant Pipeline Review Process - handout



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WHAT DOES IT TAKE?

Pre-Award Tasks: (cont.)

Go!

7. Follow funders' instructions regarding communicating with them about the intended project prior to submission

WHAT DOES IT TAKE?

Pre-Award Tasks: (cont.)

Go!

8. Prepare **Proposal Development Timeline** and assign tasks with internal deadlines based on respective areas of expertise

WHAT DOES IT TAKE?

Pre-Award Tasks: (cont.)

Go!

9. Set up recurring weekly meetings/conference calls to ensure accountability and ongoing communication

WHAT DOES IT TAKE?

Pre-Award Tasks:

Go!

10. Develop responsive proposal

- Write responses to required narrative sections using relevant statistics and material requested from team members
- Edit all sections and ensure consistency and flow
- Prepare all forms and ensure all mandatory/fatal requirements met
- Consolidate proposal packet and submit

WHAT DOES IT TAKE?



Lots of it

WHAT DOES IT TAKE?

Post-Award Tasks:

1. Lead Transition and Pre-Implementation Meetings
2. Communicate with funders and partners
3. Assist with contract review and approval

SETTING YOURSELF UP FOR SUCCESS

BUILDING THE RIGHT TEAM

1. Lead grant writer and coordinator
2. Program staff and subject matter experts
3. Finance/accounting staff
4. Management and executive leadership
5. Board members and CEO as ambassadors/connectors

SETTING YOURSELF UP FOR SUCCESS

BUILDING THE RIGHT TEAM

Grant Writer Skillset:

1. Detail-oriented
2. Critical thinker
3. Excellent written and verbal communication skills
4. Prioritization skills
5. Internally motivated
6. Inquisitive
7. Excellent collaborator
8. Creative
9. *Translator*

SETTING YOURSELF UP FOR SUCCESS

BUILDING THE RIGHT TEAM

Common Questions:

1. Freelance, Volunteer or Employee?

2019 State of Grantseeking Report

- Organizational staff as primary grant seekers = 71% of respondents
- Board members = 9%
- Contracted grant writers = 8%
- Volunteers = 7%

SETTING YOURSELF UP FOR SUCCESS

BUILDING THE RIGHT TEAM

Common Questions:

2. Compensation Factors
 - Type of grants pursued and complexity (government vs. foundations, new programs and projects vs. existing programs)
 - Number of counties served by organization
 - Number of different programs that may require funding

3. Prior Success Rate
 - Varies depending on several factors

MEASURING SUCCESS

- **What influences success?**
 - Factors within grant writer's control
 - Factors outside grant writer's control

MEASURING SUCCESS

Factors within grant writer's control:

- ✓ Screening and choosing opportunities appropriately
- ✓ Writing clear and compelling proposals
- ✓ Ensuring all application requirements are met
- ✓ Working with team to ensure consistency between info provided in application, on organization website, charity profile sites, and through pre-award site visits
- ✓ Building and maintaining positive relationships with funders

MEASURING SUCCESS

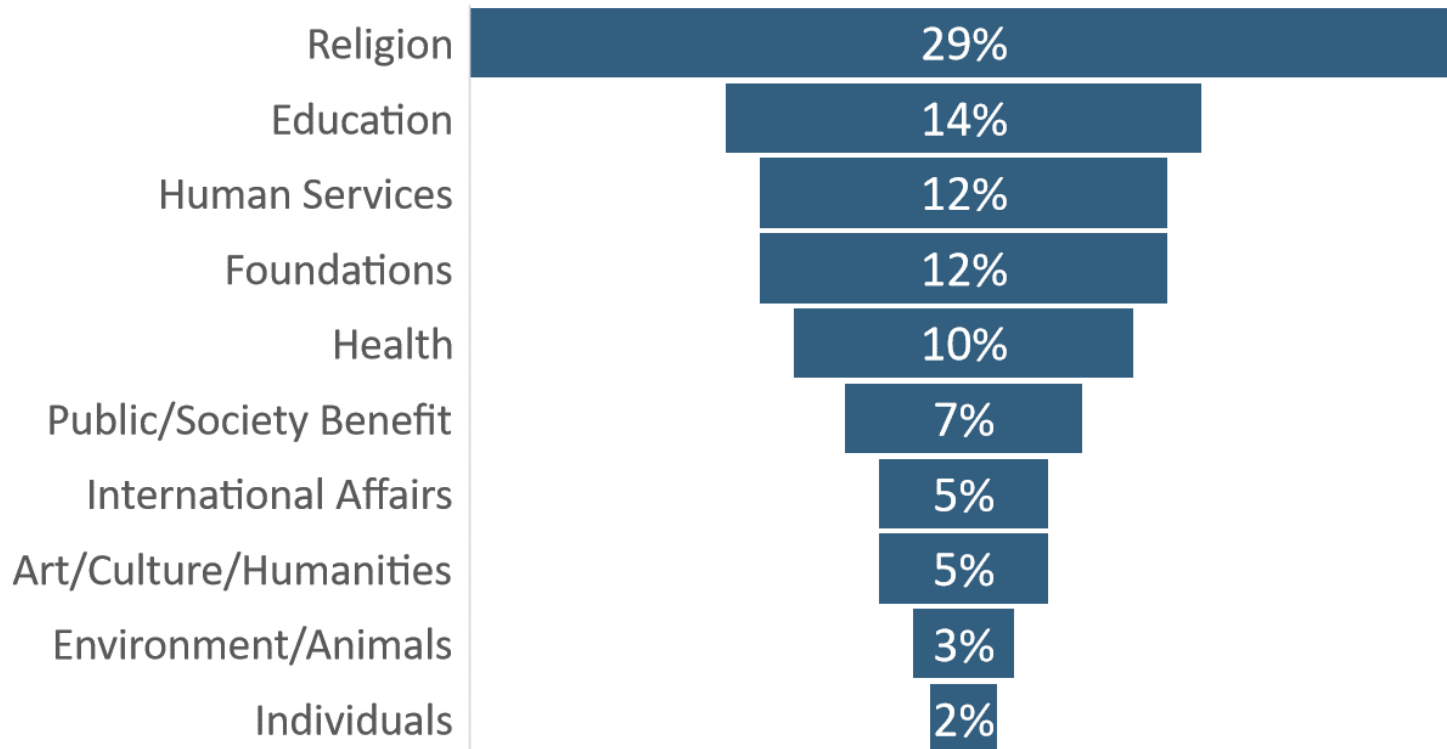
Factors outside grant writer's control

- ✓ Age of organization
- ✓ Mission
- ✓ Financial strength and viability
- ✓ Organization's reputation in community
- ✓ Organization's expertise and experience in specific areas
- ✓ Programmatic and financial performance on prior grants
- ✓ Foundation grants:
 - Strong leadership/CEO
 - History of board giving
 - Board connection to foundation leaders

MEASURING SUCCESS

Charitable Dollars and Mission

Giving USA 2018



MEASURING SUCCESS

COMMON METRICS

1. Number of applications submitted that met minimum mandatory requirements
2. Scores on state and federal applications
3. Dollars secured
 - Size and type of applicant organization
 - Type of projects
4. Percentage of submissions funded
 - Organization mission
 - Prior history/relationship with funder

CHOOSING THE RIGHT GRANTS

Where to find them?

- Federal: free, customized alerts through grants.gov or directly from federal agencies
- State: varies by state. e.g., Florida state vendor bidding system
- Local government: county health and human services department, city government websites, etc.

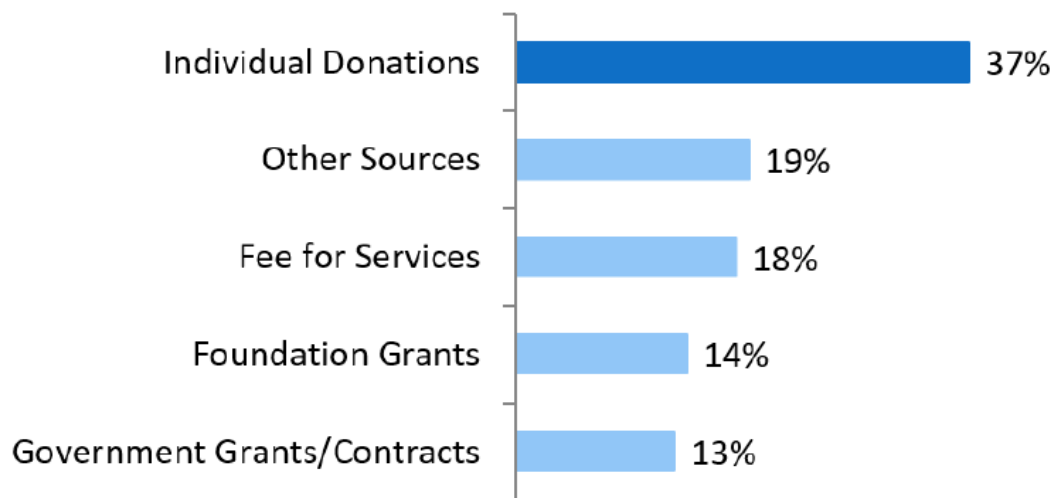
CHOOSING THE RIGHT GRANTS

Where to find them?

- Foundation grants:
 - ✓ Foundation Directory Online: Advanced Search Criteria – requires paid subscription
 - ✓ Other Non-Profits' Annual Reports
 - ✓ GrantHub's *Who Funded This Organization* – requires paid subscription
- Corporate grants:
 - ✓ Local representatives
 - ✓ Website: Community impact or corporate social responsibility pages
- Community foundations:
 - ✓ Foundation Center's stats page: data.foundationcenter.org – free
- Family foundations and other lesser known private foundations:
 - ✓ CEO and Board Members networking and relationship building
 - ✓ Large banks that administer family foundations and trusts (U.S. Trust, Northern Trust, etc.)

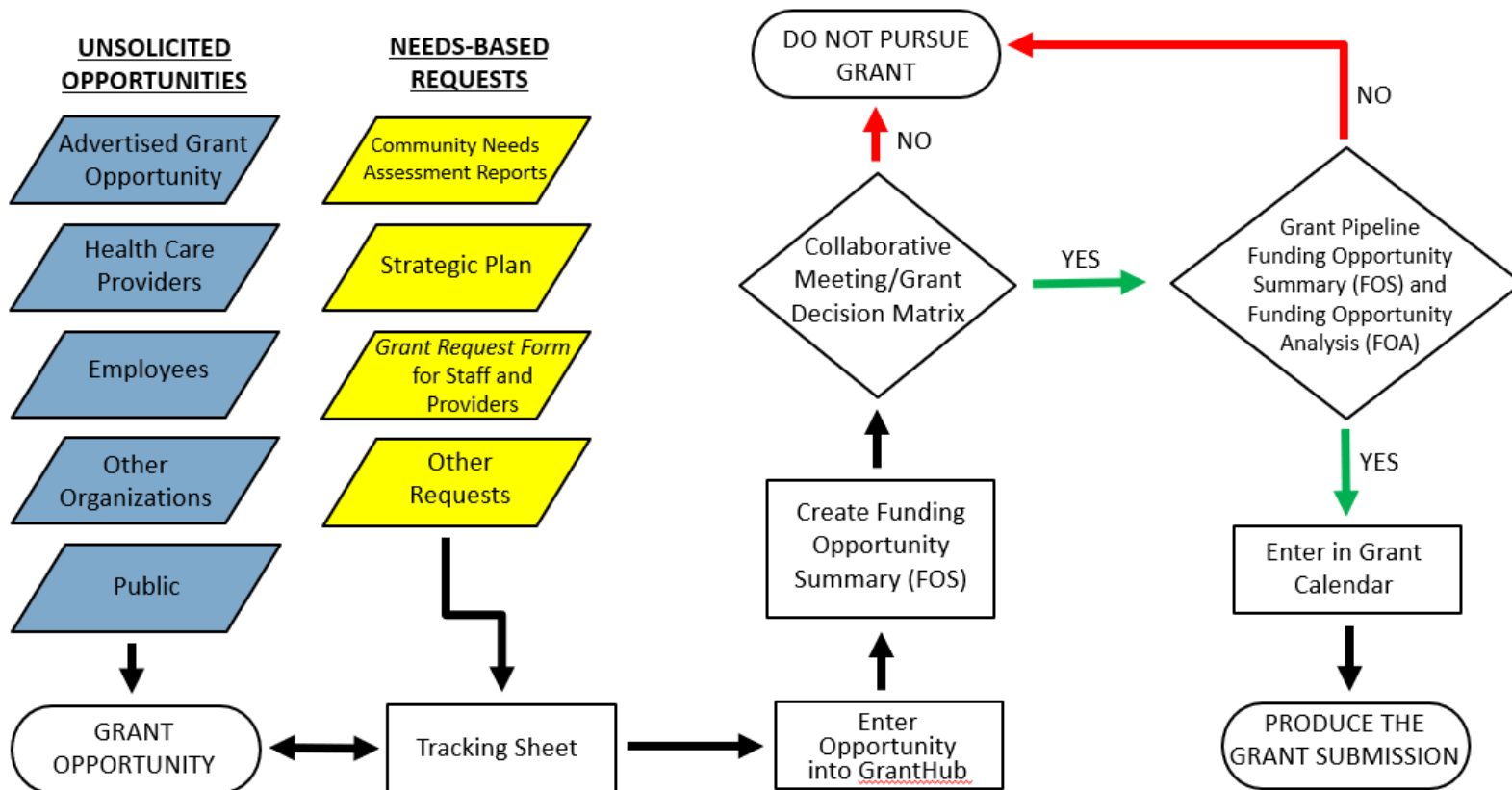
CHOOSING THE RIGHT GRANTS

Indirect/Admin. Costs Funding Source



Source: GrantStation – 2019 State of Grantseeking Report

PROCEDURES, TEMPLATES AND WORKFLOWS



FIVE TIPS FOR SUCCESS

- **TIP #1** — READ THE INSTRUCTIONS
READ THE INSTRUCTIONS
READ THE INSTRUCTIONS
READ THE INSTRUCTIONS
AGAIN. AND AGAIN.

FIVE TIPS FOR SUCCESS

- **TIP #2** — FOLLOW THE INSTRUCTIONS.

PERIOD.

FIVE TIPS FOR SUCCESS

• **TIP #3** —

FRESH SET OF EYES



FIVE TIPS FOR SUCCESS

• **TIP #4** —

**GET COMFORTABLE
PRIORITIZING DAILY.**

FIVE TIPS FOR SUCCESS

• TIP #5 —

POST AWARD FOLLOW
THROUGH



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Resources & Templates

- 1) Funding Alerts Subscription List
- 2) Grant Request Form
- 3) Needs Template
- 4) Funding Opportunity Summary (FOS)
- 5) Grant Calendar
- 6) Grant Decision Matrix
- 7) Grant Pipeline
- 8) Proposal Development Timeline
- 9) List of websites with links to relevant statistics



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? **QUESTIONS** ?

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Isfnet.org/Isf-health-systems



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