

# Project Action Plan

**Goal:**

**Objective:**

Activity(ies)	Deadline	Who Responsible	Evaluation	\$

## GRANT WRITING GUIDE FOR BEGINNERS

GRANT WRITING  
GUIDE FOR BEGINNERS

## BEFORE YOU WRITE

Before preparing a grant proposal or application, fund seekers should ask themselves several questions. They should do this because, in the long run, it will save them time and frustration. Those from whom you are seeking funding will be asking the very same questions. Answering these questions early increases the chances that he proposed project will be funded.

1. What are the benefits of the proposed project?  
Don't take it for granted that the answer is obvious. Spell it out. Tell the funder in simple terms what their money is going to buy them. Because that's what they're interested in – what are they getting for their money?
2. Who will benefit from the project?
3. What segment of society – youth, seniors, education systems, and entire community – will benefit from this project?
4. Funders whether it is government agencies, private foundations, or individuals, also want to know what fund seekers are doing to help themselves. Few funders want to permanently adopt the project. They want to know how the project plans to sustain itself once the grants have run out. Fund seekers who show they are creatively exploring alternative funding sources have a better chance of securing funds.

## PREPARE

The following information should be prepared before you write a grant.

Since oftentimes you have a short timeframe in which to prepare a proposal, it is a good idea to have these items copied and filed in sets for easy compilation.

1. 502 © (3) letter from IRS
2. List of your Board of Directors including their names, addresses phone numbers
3. List of staff with job descriptions
4. Copy of your most recent audit
5. Demographics of your locale and population
6. Sample Budgets with narrative descriptions
7. Letters of support
8. History of organizations including awards or recognitions
9. Future funding statement
10. Accountability, evaluation or assurance plan. (Who is responsible that funds will be spent as stated.)

\*the actual sequence of the above will be listed in the request for proposal requirements.

## DEVELOP YOUR NEED STATEMENT

- \*problem statement or statement of need
- \*the goal or solution to the problem or need
- \*the major objectives or how you will meet the goal
- \*the sub-objectives or what you must do to accomplish the major objectives (may be optional)

## TIPS FOR GETTING FUNDED

1. Letterheads are 5% of getting funded. Attach a copy of the cover letter to every copy of proposal.
2. Boards and advisory councils are 5% of getting grants.
3. Letters of support should be real.
4. 80% of your grant proposal should be done prior to finding a funder.
5. Mission statements get you funded. What is your mission? Why do you do what you do?
6. When appropriate, involve the media in the issue and the grant.
7. Know your demographics
8. There is a psychological advantage for asking for less than maximum
9. "After reviewing your request for proposal, I find your major area of interest is \_\_\_\_\_. This proposal directly addresses your area of interest."

## PROPOSAL CHECKLIST

A COMPLETE PROPOSAL SHOULD INCLUDE THE FOLLOWING INFORMATION IN THE ORDER STATED:

\_\_\_ Proposal Coversheet. All items must be completed.

\_\_\_ Concise history of the organization with an overview of current programs or activities

\_\_\_ Copy of the Internal Revenue Service letter stating the organization is tax exempt

\_\_\_ Statement from the organization's board authorizing the request and agreeing to carry out the project if funded.

\_\_\_ Description of the problem or need to be met by the project

\_\_\_ Detailed description of the project including strategies, measurable objectives, and timetable.

\_\_\_ Names and qualifications of persons responsible for carrying out the program

\_\_\_ Detailed project budget and budget narrative, including income sources and expenditures; a list of other requests for funding, including those pending or approved.

\_\_\_ Most recent audited financial statement and current operating budget of the organization.

\_\_\_ Plan for continuing the project once grant funding ends or plan for supplementing grant funds to achieve project completion.

\_\_\_ Plan for providing oversight or evaluating the project

\_\_\_ Letters recommending the project and other relevant supporting material such as reports, brochures or news articles.

APPLICANTS SHOULD SUBMIT AN ORIGINAL AND THE SPECIFIED NUMBER OF COPIES OF THEIR COMPLETED PROPOSAL.

## WHERE TO START

Writing successful proposals is a process that begins with research, continues with designing, writing, and submitting proposals and ends with ongoing grants management. The process requires you to accomplish certain tasks:

1. Know your subject
2. Organize your thoughts
3. Write clearly and concisely
4. Package your proposal

## KNOW YOUR SUBJECT

Every proposal, regardless of purpose or prospect, must answer certain basic questions:

1. What is the issue being addressed?
2. Why is your organization the best place to address it?
3. What will be the impact of the project?
4. How will you accomplish those changes?
5. What do you need (time, money, people) to do it?
6. How will you gauge your success?
7. Why are you seeking this particular grant?

## ORGANIZE YOUR THOUGHTS

Common sense will dictate that different projects be described differently, and that they be supported by different types of information. For example, if you're asking for start-up money for new projects, you need to have some ideas about future sources of ongoing funding and communicate these to the grant funder. In the case of an endowed fund, the future source is the same as the present one, so you do not need to elaborate.

## WRITE CLEARLY AND CONCISELY

If you have prepared carefully, putting together a coherent package should be a natural step. Just remember that the questions you've been trying to answer are the same ones the donor wants answered.

The most important point is to think through what you're saying before you put it on paper. And to edit it carefully after you've written it. One of the most interesting suggestions heard is to try reading through your text without adjectives, and see what is left. **Your goal is to be concise and clear.** Only use superlatives if you can back them up.

Keep referring to your outline, making sure that you have covered all the points in a logical order. Keep it simple. Bear in mind that proposal writing is much closer in both style and spirit to news writing than to creative writing, but with the added element of marketing.

Your opening statement should be interesting, exciting – try to tie it to a larger concern.

Your plan should be clearly thought through – realistic. Your needs (time, money, and people) and plans for meeting them should be clear.

Your organizations strengths should be persuasively, concretely presented.

Above all, your approach should be customized, tailored to the particular prospect.

### PACKAGE YOUR PROPOSAL

The format of your proposals not a matter of indifference – appearances count. Simplicity of design, clarity of organization, and legibility can be as important as the content of your document. If they can't read it, they probably won't fund it.

Attachments are part of the format of your submission and should be kept to the point. Resist temptation to overload the prospect with every possible example/sample.

Use a few great illustrations or supporting documents, not everything you have. Too much can be just that.

Read your Request for Proposals directives. If it says limit to 5 pages, limit to 5 pages.

### DUE DATE

Make certain your proposal is postmarked by the due date deadline. There are no exceptions for submitting a proposal late.

### RESOURCES

All libraries carry a number of "how to" books and guides to access available funds. It is worth your time to spend a few hours perusing the resources available in your public libraries.

The internet is also an invaluable resource for obtaining information on available funding.

## PROPOSAL CHECKLIST

- \_\_\_\_\_ Did I state my purpose in two or three sentences?
- \_\_\_\_\_ Are major accomplishments related to the proposal listed?
- \_\_\_\_\_ How do I help the community?
- \_\_\_\_\_ What are my target population and the demographics?
- \_\_\_\_\_ What services do I provide to the community?
- \_\_\_\_\_ Who performs these services? (Staff, volunteers)
- \_\_\_\_\_ What are the strengths and weaknesses of your organization?
- \_\_\_\_\_ Are these services provided by others in the community?
- \_\_\_\_\_ Have you listed your short and long term goals?
- \_\_\_\_\_ Who helped you define these goals? (Board, volunteers, staff, etc.)
- \_\_\_\_\_ What is your plan of action? How will you accomplish these goals? When will each objective been reached?
- \_\_\_\_\_ What changes will occur in your organization because of your goals?
- \_\_\_\_\_ Where does your funding come from? (donations of individuals, businesses, grants, public funds, fundraising, membership fees, or other income generating activities)
- \_\_\_\_\_ What resources do you have other than financial? (volunteers, goods, equipment, donated services)



## GENERAL GUIDELINES IN SEEKING FUNDS

### Check Eligibility for Funding

One of the most common mistakes fund seekers make is applying for funds for which they are not eligible. Doing so wastes the time of both the funding organization and the applicant. To avoid this problem, check the funding sources eligibility requirements and areas of interest. Often these will be mentioned in catalogues and directories.

### Do Not Solicit Funds Over The Telephone

As a general rule, it is not a good idea to ask for funds over the telephone. It is quite easy for the funder to say "no" to a faceless, anonymous person. A telephone call for general information is acceptable.

### Read Grant Applications Carefully

If you are submitting your request for funds on an agency's application form, read the instructions carefully and then complete the application exactly as instructed. All applicable blanks should be filled in with accurate, relevant information. Remember some funders score applications based upon completeness.

### Neatness Counts

Just as following instructions counts, so does neatness. When funders have little else to judge you by, it becomes another detail that can make or break your case.

### Keep Word Choice Simple And To The Point

One thing to remember is to keep your choice of words simple and to the point. Proposals that are wordy or flowery are likely to put reviewers off. Words like "contraindication", "disinclination" and "prevaricate" may have their place but it is not in a grant proposal. The words in a proposal should be easy to understand and not sound stuffy. Stick with shorter words whenever possible.

As you are writing a grant proposal, it is very important to keep the level of reading on a lay person's level. If technical terms are necessary, remember to explain them fully.

## ELEMENTS OF A PROPOSAL

- A. Cover Letter
- B. Title Page
  - Title of Project
- C. Summary
  - Brief
  - Clear
  - Interesting
  - Applicant
  - Problem
  - Non-duplication
  - Goal
  - Objective
  - Cost of Request
- D. Introduction
  - History
  - Accomplishments
  - Population Data
  - Brief
  - Understandable language
  - Qualifications
  - Interesting
- E. Need Statement or Mission
  - 1 to 4 pages
  - Supported by statistics (if applicable)
  - Make a case
  - Supported by letters
  - Relates to purposes and goals of organization
  - Show community input
- F. Goal
  - Clear
  - Brief
  - Broad
- G. Major objective
  - Measurable
  - Outcomes
  - Coincide with the needs statement
  - Realistic

Time phased  
Addresses the goals

- H. Sub Objective
  - Meets major objectives
  - Describes sequence of activities
  - Describes population served
  - Describes staffing
  - One year of activities
  
- I. Evaluation
  - Plan for determining if goals and objectives were successful
  - Measurable, quantifiable, and time phased
  
- J. Future
  - Source of continued funding
  - Letters of commitment
  - Volunteers
  - Other resources
  
- K. Budget
  - Costs met by applicant
  - Costs to the community
  - Line items – detailed for one year
  - Honest
  
- L. Budget Narrative
  - Explanation of expenditures

From our staff search experts:

## Top Tips on Geographic Searching!

To help you identify funders or grants awarded to nonprofit organizations in your geographic area, FC Search provides a number of useful indexes to facilitate searching by state and city, as well as by the geographic focus of the foundation. However, with a little experimentation and the use of the "Text Search" feature, you can customize your approach to identifying funders and grants on a local level... here's how!

### Tip #1

One approach for identifying local funding sources is to perform a search for grantmakers by ZIP code. Cleveland, Ohio ZIP codes, for example, begin with "441." To identify grantmakers in the immediate vicinity that may not be in Cleveland proper, type "OH 441\*" into the Text Search field on the Grantmaker File. By doing this, FC Search is looking at any address field in a grantmaker record that has an Ohio postal code with the root ZIP code "441". The asterisk after this root number ensures that every ZIP code beginning with "441" will be included. In this way, you'll capture grantmakers not only in Cleveland, Ohio but in Beachwood and Westlake, Ohio as well!

### Tip #2

You can perform an area code search as easily as a ZIP code search as outlined above. One way to identify foundations and corporations in boroughs of New York City outside of Manhattan, for example, is to enter "Telephone: (718)" in the Text Search field of the Grantmaker File. The search engine will find all grantmaker records with telephone numbers that begin with the area code "718" representing Brooklyn, Queens, Staten Island and the Bronx!

### Tip #3

If you are looking for grantmakers that fund within your county, try running a Text Search by county name. Simply enclose the county name, e.g., "Bucks County" in quotation marks (FC Search will perform a search on the specific phrase)

The screenshot shows the 'FC Search - The Foundation Center's Database on CD-ROM' window. The 'Grantmaker Search' form has several fields: 'Grantmaker Name', 'Grantmaker State', 'Fields of Interest', 'Trustees', and 'Text Search'. The 'Text Search' field contains 'OH 441\*'. Below the form is a 'Grantmaker Search Results List' table with columns for 'Match', 'Grantmaker Name', 'City/State', and 'Total Grants'. The results list shows four entries:

Match	Grantmaker Name	City/State	Total Grants
<input type="checkbox"/>	Abington Foundation, Inc	Cleveland, OH	\$176,543
<input type="checkbox"/>	Abraham Foundation, Source, Inc	Beachwood, OH	\$15,200
<input type="checkbox"/>	Acme-Cleveland Foundation	Cleveland, OH	\$65,044
<input type="checkbox"/>	Agassiz Charitable Foundation, Andre	Cleveland, OH	\$20,500

With the 1996 Edition of FC Search (see sample screen above), as well as with future editions, you can search for grantmakers by ZIP code to identify potential funding sources on a local level.

and type this into the Text Search box in the Grantmaker File (Basic or Advanced). When our staff performed this search, they were able to identify 12 grantmaker profiles in which the phrase "Bucks County" appeared in either a purpose and activities or limitations statement or in their selected grants list, indicating they had funded a nonprofit in that region. By performing the same search on the Grants File, we were able to pinpoint 34 grant awards made to nonprofit organizations in Bucks County, Pennsylvania (here the county name appeared in the grant recipient's name field or in the grant description).

*Note: when conducting text searches, be sure to enter the phrase, with appropriate spacing, exactly as it appears in a grantmaker or grant record to achieve desired results. For example, under Tip #1, above, be sure to leave one space between "OH" and "441\*" for accuracy.*

## Three Types of Foundations to Approach For Funding

In the United States, more than 30,000 foundations exist. One-quarter of those foundations control more than 90 percent of all foundation resources. Even that number of funding sources is rather daunting. However, foundations can be broken down into several types to help you determine which types of foundations are most likely to fund your projects- that is, projects in your area of need and part of the country.

The Internal Revenue Code distinguishes between public charities and private foundations. However, both of these types of organizations call themselves foundations. The following is a description of three types of foundations that make grants to outside organizations:

**Independent Foundations-** These are private foundations, often founded by an individual or group of people such as a family. However, some foundations, like the Ford Foundation, were started this way, but are no longer affiliated with the individual who founded the foundation of his or her family. Independent foundations make contributions to other nonprofit organizations for charitable purposes. They are also required to donate roughly five percent of the value of their assets each year. Examples of independent foundations include the Rockefeller foundation, the John D. and Catherine T. MacArthur Foundation, and the Henry J. Kaiser Family Foundation.

**Community Foundations-** Foundations in this category develop their endowments by contributions from several donors. These foundations are often created to serve a particular region of the country. Consequently, community foundations generally focus their grant giving on local projects within their region. The Internal Revenue Service designates these foundations as public charities since they raise their money from a broader group than independent foundations. The largest community foundation is the New York Community Trust. Other examples include the Delaware Community Foundation and the Northwest Area Foundation.

**Company-Sponsored Foundations-** These foundations differ from independent foundations in that they are created by existing, for-profit companies. Corporations usually establish their foundations with endowments and/or make contributions from their profits. Although these foundations are sponsored by companies, legally they are separate from them. The Aetna Foundation is an example of a company-sponsored foundation.

Two types of foundation programs do not generally provide grants to organizations outside of their own, and should not be approached as sources of private giving. These are: Corporate Giving Programs, contributions made by corporations directly to charities; and Operating Foundations, that use most of their income to offer philanthropic activities or run their own charitable programs.