Grant Writing for Novices

by Marie Gress, LMSW–Macro
at Kovir LLC

HELPING ORGANIZATIONS INCREASE
THEIR CAPACITY AND IMPACT

Objectives

PREP AND PLANNING
VISIONING
DOCUMENTATION
LOGIC MODEL
GOALS AND OBJECTIVES
FIND A FOUNDATION
MAKE CONTACT

NARRATIVES
EXECUTIVE SUMMARY
COVER LETTER
TABLE OF CONTENTS
PROGRAM DESCRIPTION
PROBLEM STATEMENT
THE BUDGET

EXAMPLES AND TEMPLATES

CONTACT US AT
INFO@KOVIR.ORG
KOVIR.ORG

Part 1
Prep and Planning

Notes

Visioning

Write down any project you'd love to see your organization accomplish in the next 10 years.

Organize the Organization

Agency History

- ☐ Address, Phone, Website
- ☐ History of Organization
- ☐ Year Established
- ☐ Mission, Vision, & Values Statements
- ☐ Population Demographics
- ☐ Number Served in Last Year
- ☐ Number FTE
- ☐ Other/Notes

Tax Information

- ☐ Tax Exempt Status Letter
- ☐ IRS Form 990
- ☐ W-9
- ☐ DUNS Number
- ☐ Other

Financial Information

- ☐ Organizational Budget
- ☐ Financial Statement
- ☐ Most Recent Audit
- ☐ Program/Project Budgets
- ☐ Sources of Funding
- ☐ Other/Notes

Governance

- ☐ Board of Directors
- ☐ % of Board Giving Financially
- ☐ Organizational Chart
- ☐ Current Strategic Plan
- ☐ Articles of Incorporation
- ☐ Key Staff Bio

Other Documentation Sometimes Required

- ☐ Corporate Compliance Plan
- ☐ Performance Improvement Plan
- ☐ Policies/Procedures
- ☐ Best Practices Utilized
- ☐ MOAs/MOUs
- ☐ Contracts
- ☐ Letters of Support
- ☐ History of grants received/denied
- ☐ Solicitation License
- ☐ By-Laws, including year established

REVENUE REVIEW

Think over last year, who supported you financially? Think of foundations, businesses, individuals and think about when and if they give towards a particular thing each year. Record below.

January	February	March

April	May	June

July	August	September

October	November	December

Logic Model Worksheet
by Kovir Page
LLC

Project:
Problem Statement:

INPUTS:
What we invest

OUTPUTS:
Activities   **Specifics & Numbers**
(What we will do)

OUTCOMES // IMPACT

| **Short-term** | **Medium Term** | **Long Term** |
| **(Grant Life)** | **(1-3 Years Post-Grant)** | **(3+Years)** |

ASSUMPTIONS

EXTERNAL FACTORS

EVALUATION

SMART
Goals & Objectives

S
Specific

What do you want to accomplish? Who needs to be included? When? Why?

M
Measurable

Can you measure this? How will you know when you met your goal?

A
Achievable

Does your agency have the skills? Do you have the resources? What's the motivation? Is it realistic?

R
Relevant

Why this? Why now? How does it fit with what you currently offer? Does it align with the mission?

T
Time-Bound

When are your deadlines? Are they doable?

SMARTER GOALS

Reflect on your initial goals. How will you measure them? These measurements are your KPIs! Key Performance Indicators are the indicators to your community's performance in relation to your goals.

Reflect on your initial goals and action steps (or objectives). What are you evaluating? How are you evaluating them? Use the space below to write out some ideas.

Goal:

Objective 1:

Objective 2:

Objective 3:

E
Evaluate

WHAT are you measuring?
HOW are you measuring it?

R
Re-Evaluate

WHEN are you measuring it?
How OFTEN will you check your progress?
How will you readjust?

Is this funder a fit?

- [ ] I've reviewed their website
- [ ] I've reviewed their annual report
- [ ] Funder prioritizes my population
- [ ] Funder prioritizes my service area
- [ ] Awards amounts similar to my ask
- [ ] Their granting period fits
- [ ] My project is detailed
- [ ] I've called funder to pitch my idea
- [ ] They liked (or tweaked) my idea!
- [ ]
- [ ]
- [ ]
- [ ]

Call Script Template

"Hi, My name is __{Name}__, I'm the __{job title}__ at __{organization}__. I'm calling with a few questions about your open grant application. Who can I talk to about that?"

(Get a name and they should transfer your call.)

(Reintroduce yourself, then...) I'm calling with a few questions about your open grant application. Do you have just a few minutes?"

(If no, arrange a time to call back. If yes...)

Great! So a little bit about what I'm applying for.... Does that sound like something the foundation would support?

If they say yes...
>>I'm planning on asking for $___. Do you have any advice about that?

>>Would you be able to review the proposal for input before the final submission?

If they say no...
>>"Are there any adjustments we can make to be considered?"

>>"What other foundation's should we be talking to about this kind of project?"

Thank you for your time, this has been helpful. If I have any other questions, what is the best way to reach you?

(Hopefully they give you an email.)

Thank you again, have a good day!

Part 2
The Narratives

Notes

Write a Thorough Project Description

5 QUESTIONS TO MORE DETAIL

What's your response?

You've identified a problem in your community or population - that's your problem statement. What will be your organizations response?

What's your hook?

What's the special, unique touch your agency is giving to this project to make it stand out?

What's the research say?

Research has to show the core of your approach is going to be successful for funders to invest. Best practices? Evidence based?

What's your critic say?

Find a critic of your agency or even a critical minded friend and do an elevator pitch of your project. What questions do they have or holes do they point out?

What are your milestones?

When will you establish a collaboration? When will you hire key staff? At what points will you admit and release clients?

QUANTITATIVE vs QUALITATIVE

CHANGE

Pre/Post Test
Rate of
Change

TRACKING

Participation
Financial
Reports
Performance
ROI

DATA

Survey
Questionaire
Feedback

STAFF FACILITATED

Interview
Focus Group
Observation

RIGHT FROM THE CLIENT

Testimonial
Photo
Review

Minimalist Writing Tips

- [ ] Use a word processor

- [ ] Remove...

- [ ] ...Weak punctuation

- [ ] ...Extra punctuation

- [ ] ...Unnecessary repetition

- [ ] ...Unnecessary adjectives

- [ ] ...Filler words

- [ ] Use active voice

- [ ] Avoid overly smart words

- [ ] Choose acronyms carefully

- [ ] Characters count

- [ ]

- [ ]

Minimalist Proofing Tips

- ☐ Read out loud
- ☐ Remove...
- ☐ ...Weak punctuation
- ☐ ...Extra punctuation
- ☐ ...Unnecessary Repetition
- ☐ ...Unnecessary adjectives
- ☐ ...Filler words
- ☐ Fix sloppy grammar
- ☐ Ask someone to read it
- ☐ Repeat
- ☐
- ☐
- ☐

Part 3
Examples and Templates

Cover Letter Template

Ronny Reader CEO
Company Name
123 Address St
Anytown, ST 12345

Month, Day, Year

Dear Ms. Reader,

I am the Executive Director of Name Your Organization whose mission is to name your mission. Our flagship program is to explain your program. We are requesting $10,750 from the Name Your Foundation to pilot the next phase of this program.

In our county, 87% of minority women are unable to open a bank account by themselves. With Name our Program, these women are able to not only open a bank account, but will receive a microfinance loan and will be required to attend finance and business strategy coaching for the duration of their loan.

Name Your Organization met with Another Non-Profit in our neighboring county about their success with this program. We have collaborated with Bank 1 and Business 2 to make this program a reality here in our community. In the last year alone, Name Your Organization has assisted 255 women open their own bank accounts!

Thank you for taking the time to read this letter and reviewing our application. Our Board of Directors agreed that Your Foundation's goals, objectives, and past giving very closely aligns with the work we are doing improving women's access to financial independence.

If you have further questions, please feel free to reach out directly to me using the contact information below.

Sincerely,
Marie Gress, LMSW-Macro
Kovir LLC
marie.gress@kovir.org
Your City, MI 12345
(123) 456-7890

Executive Summary Template

Project Title
Text.

Contact Person
Name of primary contact; phone number; email

Applicant Information
Agency Address and Agency Phone/Fax

Mission Statement
Write out just your mission statement here, expected: 2 lines. Lorem ipsum dolor sit amet, consectetuer adipiscing elit, sed diam nonummy nibh euismod.

Problem Statement
You maybe be thinking about the problem in scope of your agency, but think about the problem in scope of just this program. Include city, county, state, or national data when applicable. Information in these three or four lines should be included in your problem statement section.

Project Summary
This is your response to the problem and it should talk concisely about the structure of the program as well as how it relates to the problem. Include buzzwords or ideas that are involved with your program like "person-centered" or "motivational interviewing." This section is only three or four lines.

Expected Results
Write out your goals and objectives as well as your evaluation process. If you were to be lengthy or switch up formatting to bullet points, this is where you would do that.

Our Investment
Your investment includes time, staff, equipment, collaborations - just to name a few. Mention other groups that are supporting your project. Two or three lines.

Our Request
State your ask and any specifics that are attached to it such as time period, what the money is used for, etc. Two or three lines. Executive summaries are no more than one page.

Table of Contents Template

Kovir LLC
Application for Project X
Table of Contents

Grant Proposal Template

This template was adapted from a grant I wrote to a local endowment in my early days. Some applications can be overwhelming, but some can be a great way to not only win awards for your site but also to get your feet wet in the grant seeking world.

More templates and writing samples are available on KovirPage's portal.

Agency:
Address:
Phone:
Contact Name, Title, and E-mail:

Please attached IRS Letter of Determination documentation.

Summary of the Project *(no more than 2 paragraphs)*

Statement of Need *(1 page)*

Target Population, Intended Impact, and Measurable Goals *(1 page)*

Time Frame for Implementation *(1 page)*

Other Partners *(1 paragraph)*

Description of Key Staff *(2 paragraphs)*

Specific Staff Training Needed *(1 paragraph)*

Grant Amount Requested:

Project Budget Table *(Expenses and Revenues)*

Budget Justification including intended purposes for pending awards. *(1 paragraph)*

Please attach a flyer, cover letter, and bibliography.

Budget Template

Expenses | **Total** | **Ask**

Expenses	Total	Ask
Salaries & Benefits Include taxes, worker's comp, retirement, health care	$34,700	$20,000

Operating Expenses
    Printing, phone, internet, equipment and office "lease,"
    staff development, insurance, office supplies
	$2,000	$2,000

Advertising the program
    Think about social media, special print jobs, serviced
    mailers, email blasts, postage and envelopes
	$500	$0

Books and Materials (vouchers, equipment, or what the program needs specifically)	$3,250	$3,250

Travel Costs
    Many will reimburse staff at IRS rate, others include gas
    and insurance for using a company vehicle
	$750	$0

Other - List out any other expenses, think of everything!!		

Revenue | **Total**

Revenue	Total
Client Contributions Program fees, suggested donations for using services	$1,950

Individual Donations
    TIP: Keep track of your individual donors to this program
    so you can show them the impact of their donations!
	$2,000

Fundraising Corporate sponsors, fundraisers, etc	$2,000

Grant A
    This might be a grant that you've won have a pending
     ask to cover part of the costs you have outlined above
	$10,000

Grant B
    This is the grant proposal you are currently writing.
    I save them for last so they get the sense they are the
    last piece of the programmatic pie
	$25,250

Bibliography Template

Bibliography

Lastname, C. (2008). Title of the source without caps except Proper Nouns or: First word after colon. The Journal or Publication Italicized and Capped, Vol#(Issue#), Page numbers.

Lastname, O. (2010). Online journal using DOI or digital object identifier. Main Online Journal Name, Vol#(Issue#), 159-192. doi: 10.1000/182

Lastname, W. (2009). If there is no DOI use the URL of the main website referenced. Article Without DOI Reference, Vol#(Issue#), 166-212. Retrieved from http://www.example.com

In Proposal Citation Options

In text: "In a 2019 study, M. Gress discovered..."

After text: "Studies show.... (Gress 2019)."

Footnote: "Studies show... (1)."

Grant Report Template

Name of Project Funded
Remind the funder of your agency, agency mission, and the project they funded. You can talk about the main activities of your program, brag on some of your basic but exciting numbers (number of classes, attendance, number of people). Start to get them excited about your success to come in the next section! Keep this intro/recap to one paragraph.

Evaluation Tool or Type of Change
This section is to explain how you gathered the information you promised to gather. Feel free to bulk it up with pictures, quotes, and the like. If numbers are not in your favor, make sure to explain it and reframe it.
100% of participants surveyed said that their knowledge in _____ area has increased significantly
- our goal was 60%.
100% said they feel more confident doing _____ - our goal was 60%.
In addition, participants have remarked how this program has positively enriched their lives.
First Name Last Name (90 year old woman) commented, "Insert quote."
Another participant (58 year old daughter-caregiver) commented, "Insert quote."

Fund Explanation
Talk about remaining funds that might be left and what the plan for spending is. Sometimes another collaborator or funder adds capacity or another service that was not part of your initial grant ask, this is a good spot for that to show additional return on investment. Remember that if you haven't used all the funds, your funder may ask for the remainder back.

Thank you
Wrap it up with a nice thank you and saying you are looking forward to future partnership.

This report is generally only one page long.

Feel free to shift some of these sections around as needed, but headers are helpful to guide the reader. Be sure to follow proof-reading techniques for this document too!

PAPER PLATE STORY

NAME:

DATE:

PROGRAM:

SATISFIED   NEUTRAL   UNSATISFIED

Thank you for eating with our Senior Cafe! Please write how this service has impacted your life. We are excited to display your stories at our upcoming fundraiser.

Frequently Used

GRANT SEARCHING
- Guidestar
- Council of Michigan Foundations
- Foundation Directory Online (FDO)
- GrantStation
- GrantWatch
- Grants.gov
- Double the Donation
- Benevity.com

BOOKS ON MY SHELF:
- Demystifying Grant Seeking: What You Really Need to Do to Get Grants By Larissa Golden Brown and Martin John Brown
- How to Write a Grant Proposal By Cheryl Carter New and James Aaron Quick

SOCIAL MEDIA I FOLLOW:
- Funding for Good
- Get Fully Funded
- The Balance Small Business
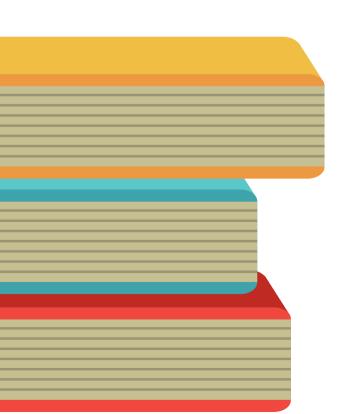- Reddit: r/nonprofit

PODCAST IN MY EAR:
- The Small Non-Profit

OTHER TOOLS:
- Canva.com
- Google Suite
- KovirTech

CONTACT US AT
INFO@KOVIR.ORG
KOVIR.ORG