LAKELAND DISTRICT
for Sport, Culture & Recreation

Guide to Effective Proposal Writing

Working with our members towards building healthy, active communities through sport, culture and recreation.

Who We Are

The Lakeland District for Sport, Culture and Recreation Inc. is a non-profit volunteer based organization. We exist to facilitate the development of sport, culture and recreation programs and services to the residents of our District. We are governed by a volunteer board of directors and employ five full-time and one part-time staff. Our main office is in Prince Albert at 99 Terry Simpson Lane and we had a satellite office in Nipawin that has since been moved to Naicam. The Lakeland District for Sport, Culture and Recreation is one of 12,000 organizations and groups that receive funding from Saskatchewan Lotteries.

Our Mission

To facilitate capacity building in our communities that will develop a sport, culture and recreation delivery system that enhances the quality of life of the people within our District.

Our Vision

We envision people actively participating in quality sport, culture and recreation programs within our communities.

Our Values

We value ….

- Partnerships and collaboration
- Opportunity
- Diversity
- Integration
- Inclusivity
- Honesty
- Innovation

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FOREWORD

As Lakeland District for Sport, Culture and Recreation enters its fifth year of activity, we are pleased to launch our new manual, *A Guide to Effective Proposal Writing*, for community organizations, as well as directors, managers and leaders in the district. This manual focuses on one key area in the cultural and community sector: fundraising. It will offer users some practical guidance on tackling the challenges of effective proposal writing.

Fundraising is a necessary part of non-profit and community organizations in Saskatchewan. We hope this guide will be useful and motivating to those of you who are trying to raise funds for your projects. This workbook is an easy-to-use guide and skill-building tool for those who must deal with the complex task of developing funding proposals. The Lakeland District for Sport, Culture and Recreation is grateful to SaskCulture for their generous support in helping us build this most essential manual for the non-profit and community sector.

Whether you are nervously anticipating writing your first grant proposal or are a seasoned grant-writer, it is our hope that this manual will assist you in developing coherent and fundable proposals.

Originally conceived as a companion resource for our Grant Writing Workshops, this manual has evolved into a resource tool for district members to use on its own. It provides guidance and tools that will help you to choose appropriate funding agencies and offer a process whereby you can proceed in writing your proposals with confidence.

It is important to remember that just as every community is different, so too are funders. Your own self-assessment, research and planning is critical in developing suitable funding contacts in your area and tailoring your approach appropriately and effectively.

Although we obviously can make no guarantees, we wish you every success as you put pen to paper (or fingers to keyboard). Let’s get started!

CHAPTER 1 GETTING STARTED

Proposal writing is a skill that you can master with the right tools, knowledge, and a bit of practice. The manual will serve as a guide to best practices for fund seeking and proposal development. You will gain insight on how to find the ideal funders, do project planning, budgets and how to write an effective proposal. The workbook can be read in its entirety, or each chapter used on an as-needed basis. The manual will help you to write winning proposals for government agencies, private foundations and corporate donors. Our goal is to give you the skills and the confidence to pursue those winning grants, and ultimately increase the capacity of your organization.

Good Idea + Good Grantsmanship = Effective Funding Proposal

At the core of any good grant application is a good idea that fills a gap or brings meaningful programs or services to your community. However, it takes more than a good idea to be an effective proposal writer. A compelling and competitive proposal needs one other essential ingredient: *good grantsmanship.*

What is good grantsmanship?

A successful proposal is a carefully constructed plan that will show a genuine need and an effective way to address this need through a set of activities and resources. Our step-by-step guide will teach you how to use "good grantsmanship" in the construction of an effective proposal. Outlined below, is the content that you will find in each of the chapters, along with essential tips and worksheets.

- **Assessing Your Readiness.** Before preparing a funding proposal, show that your project fulfills a need and has the resources and data to build a persuasive argument. *Competitive applications will show strength in all of these areas.*

- **Identify Funding Sources.** Before preparing a funding proposal, identify the type of funding mechanism required (i.e. to run a program, purchase equipment). *Competitive applications make requests only for eligible funds that are within the funder's criteria.*

- **Assess the Funding Agency.** Before preparing a proposal, research the target funder to gather information on its mission, strategic plan and community investment priorities. *Competitive applications closely align with and support the agency's goals and objectives.*

- **Know Yourself – Assets Inventory.** To ensure you apply to funders that are a good match, you must properly assess your values, mission, priorities, demographic, strengths and weakness, needs, objectives and outcomes. *Competitive applications highlight assets while reflecting a project that is a good match for the funder.*

REMEMBER!

A good idea + good grantsmanship are essential to creating a compelling and competitive funding proposal.

- **Reading the Proposal Request.** Read the funding request carefully to gain as much information as possible about the kind and scope of projects the program will support. Highlight criteria, requirements and the order of information requested. *Competitive applications fully address all of the requirements and in the format requested.*

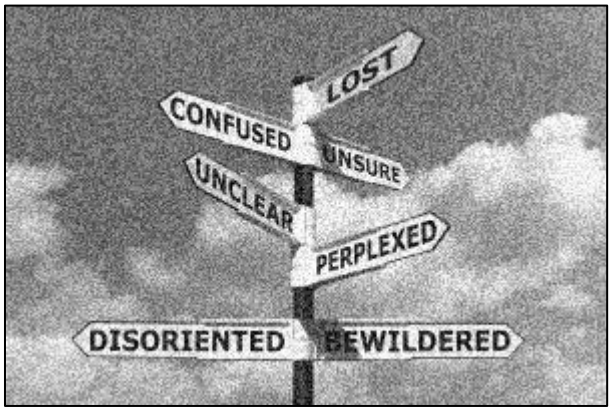
- **Understanding the Review Process.** Learn as much as possible about the reviewers, review process and review criteria used to evaluate an application. Remember that the administrator or officer is there for guidance. *Competitive applications address all review criteria and make contact with the officer.*

- **Drafting the Application.** The grant application is the only means of communicating a proposed idea to reviewers. If the reviewers have difficulty understanding the proposal, they will not advocate on your behalf during the review process. *Competitive applications communicate ideas clearly and convey passion, excitement, and commitment to the proposed project.*

- **Follow Up Reports and Activities.** Although the successful awarding of a grant is the goal of writing a proposal, the follow up reports and activities are key to relationship building with funders and to your accountability. *Competitive applications have accountability strategies and good reporting practices.*

Who should use the manual?

This manual is specifically for those who may not feel confident about writing proposals, and for those who may or may not have experience in drafting proposals. Additionally, the manual is for individuals and organizations that are committed to increasing their capacity for raising money and achieving good results.



CHAPTER 2 ASSESSING YOUR READINESS

When you are passionate about an idea, you may find it tempting to begin drafting a proposal right away. However, properly preparing an application requires an investment of your time—*beforehand.* If all the elements of a good application are in place – a great idea, sound plan, qualifications, resources and the data to support it – a writer can proceed with confidence and clarity. The best advice for preparing a grant application is to give yourself ample time and take all the necessary steps towards achieving your goal of preparing a competitive proposal.

Why is assessing important?

The proposal will become the basis of building your relationship with a funder. If a funder reviews a proposal written without careful thought and planning, your relationship will be very short lived! First impressions are key. You want the reviewer to be confident that you have identified a need and that you have developed a carefully committed plan to addressing that need.

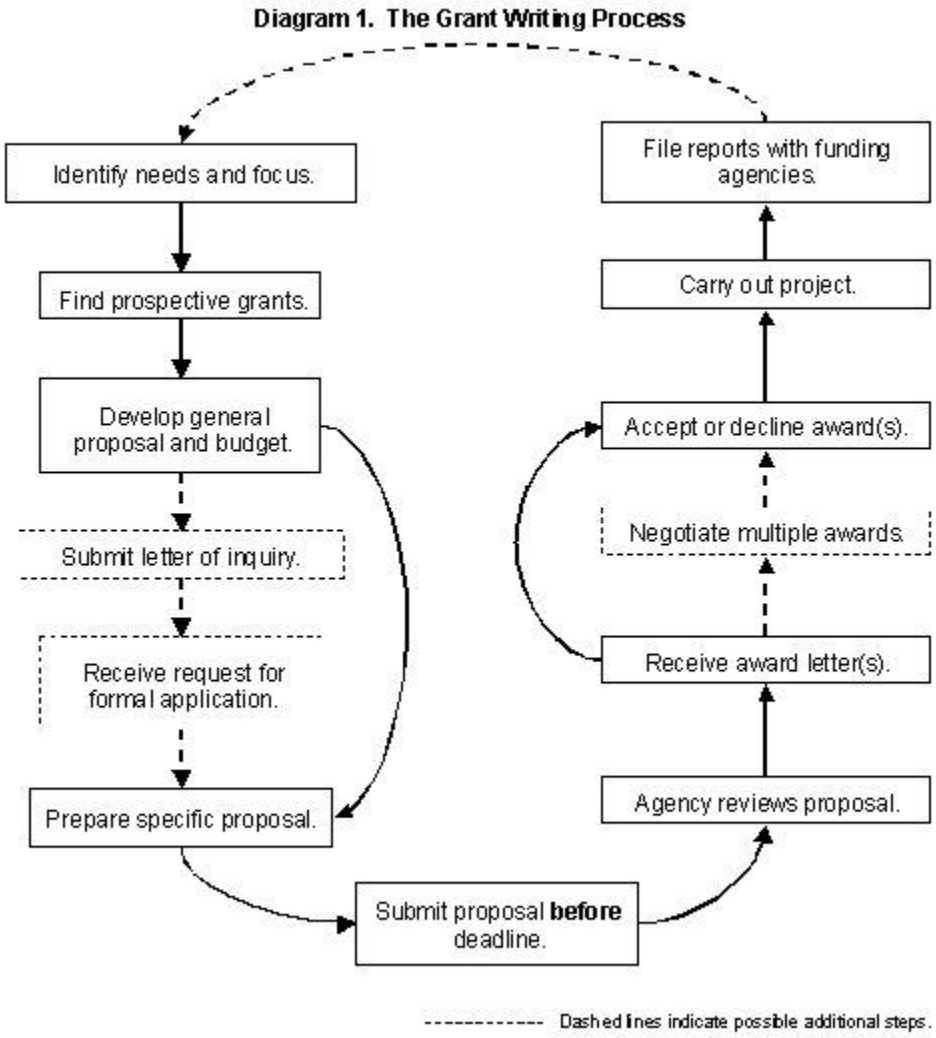
REMEMBER!

- Do not start writing a funding proposal before you have done the necessary research, thinking and planning.
- If possible, begin preparing at least a month before submitting a funding proposal. As you will learn, there is a lot to do and you need time to do it properly.

Give yourself enough time

Constructing a good application requires time. Lead-time will help you identify, refine and assess your proposed idea. In short, giving yourself ample time to bring everything into a sharp focus will save you from "burning the midnight oil" a week before the due date. Working on a proposal at the last minute can greatly reduce your chances of success and creates unnecessary stress.

Instead, give yourself enough lead-time to collect support materials, get appropriate signatures, board minutes and familiarize yourself with the application criteria and guidelines. This will leave you with the proper amount of time to plan and draft the application, have it vetted by colleagues, revise and edit the text before submission. Below is a diagram from the UNC – The Writing Centre website that shows the circular stages of the grant writing process.



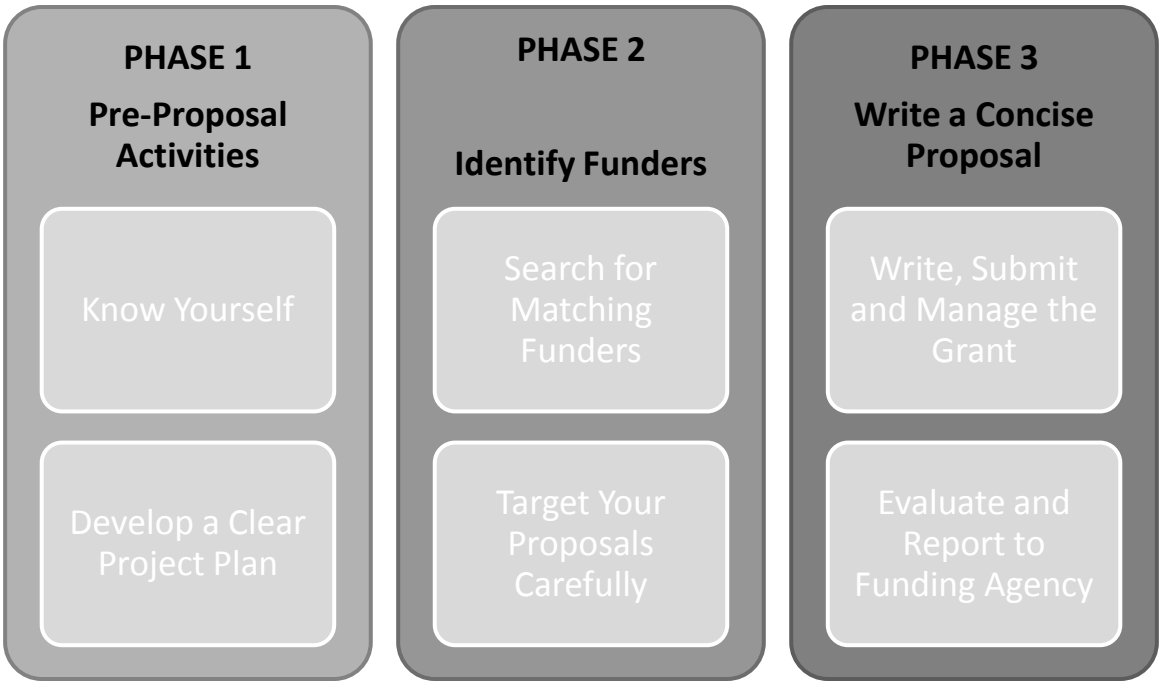
Create a schedule

Without tools or a good plan of action, the steps outlined above may seem like a daunting process. However, by breaking the steps down into phases and tasks, we will help you to simplify the process. To get you moving in the right direction, we have provided a proposal production schedule and a chart that outlines each of the task areas required in the three phases (as outlined on the next page).

Worksheet 1: Proposal Production Schedule Template

Three phases of grant writing

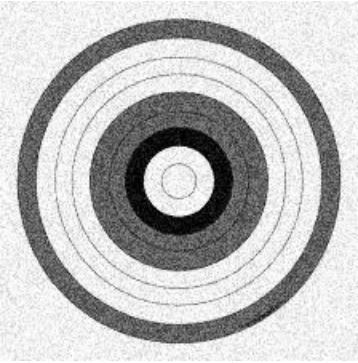
The chart below shows the order of the activities that you should follow when you are developing a funding proposal. However, for practical purposes, we will take you through the "Identify Funders" section first. Why? Understanding how the funding system works will give you a much clearer picture of why the pre-proposal stage is so crucial to your process and to a successful outcome!



OTHER WAYS TO STAY ORGANIZED

- Keep an electronic or paper file of support letters, mission statement, updated board of directors list, incorporation documents, list of achievements, program descriptions, etc.
- Invest in a wall calendar to add upcoming grant deadlines or grant report due dates.
- Create an excel spreadsheet, binder or file folder with a listing or hard copy of potential funders, deadline dates, criteria and contact information.
- Code all receipts or expenditures with a project number to help facilitate the final reporting requirements at the end of your project.
- Keep copies of all grant applications and acceptance/rejection letters.

CHAPTER 3 IDENTIFY FUNDING SOURCES



Before you even consider preparing a funding proposal, it is necessary to understand the types of grants available, the different types of funders and the best way to search for the ideal funding opportunities. This will keep you on target by ensuring that you do not stray too far from your funding goals or potential funding matches.

Understanding funder interests

Every potential funder (government, foundation or corporation) has specific types of funding it will or will not support. The first step is to learn about the different types of grants available. Sometimes you will find that a grant falls under multiple categories such as "operations and program development" or "capital and project." The following table will provide you with some details about the specific types of funding that may be available to you:

FUNDING TYPE	DESCRIPTION
Building/Renovation Funds	Funding to build or renovate a facility. Building funds are the most difficult to secure. Only a small percentage of foundations and corporations award grants for these types of projects.
Capital Support	Funding for equipment and other capital projects. Large-scale projects may take 1-3 years to secure total funding. This type of request can be a major or minor undertaking depending on the scale of the project.
Matching Funds	Funding awarded with the requirement of other funding to match or exceed the initial grant amount.
Capacity Building	Funding to strengthen infrastructure such as board development, staff training, strategic or policy planning and succession of staff.
General/Operating	Funding for general budget line-item expenses such as salaries, travel, administration and other expenses necessary to operate organization.
Program Support or Development	Funding for expenses related to ongoing programs or the development of new programs.
Project	Funding for expenses related to specific projects or activities that may or may not continue in the future. These are usually one-time grants.
Marketing	Funding for expenses related to promoting or marketing your program or activities like websites, advertising, campaigns or promotional materials.
Seed Money	Funding for expenses related to specific projects or activities that may or may not continue in the future. These are one-time grants.

Identifying the different types of funders:

Once you have a clear picture of the types of grants available, it is helpful to understand the different types of funders that exist. Each funder listed below comes with a set of advantages and disadvantages that you need to consider before searching for those ideal funding opportunities.

TYPE OF FUNDER	ADVANTAGES	DISADVANTAGES
Federal Government or Agencies	● Often have a lot of money. ● May be useful on issues of policy, access and industry. ● Projects that fit government strategy increases chances. ● Program or project specific. ● Provide guidance or feedback.	● Gives and takes away based on political agenda. ● Complex applications. ● Higher accountability. ● Review process is slow. ● Payment slow and inflexible.
Provincial and Municipal Governments or Agencies	● Community or regionally focused. ● Focus on gaps or new priorities. ● Support for operation, capital, project, program and capacity. ● Multi-year funding opportunities. ● Officers provide guidance or feedback on your application.	● Limited in scope. ● Limited funding available. ● Conditional terms or narrow criteria. ● Funds not sent until final report. ● Program only supported once unless there is an expansion.
Private Foundations	● Small to large sums of money to give. ● Advance particular causes rather than for public profile or commercial gain. ● Philanthropic vs. Public -- give out of goodness of their heart. ● Often behind the scene, less need for recognition or extensive reports.	● Process for application often a two-step process with Letter of Inquiry and invite for application ● Regional restrictions. ● Finding private foundations can be more difficult. ● Priorities change or limited scope.
Corporate Funding	● Small to large sums of money to give. ● Usually clear on what they want. ● Support quality of life. ● Focus on employable or new clients. ● Reflect corporate values or improve community profile.	● Change priorities quite often. ● Sometimes want direct representation or specific public profile opportunities. ● Often sensitive to anything that might alienate other stakeholders or customers.

Searching for funding opportunities

Self-directed searches of funding agency web sites, combined with the complementary use of Google, Yahoo or other search tools, are effective ways to identify funding opportunities. There are also many free online databases and other published resources listed on the next page.

Municipal, provincial and federal agencies have fairly robust and well-organized web sites to help you search for potential grants. Subscription-based e-mail funding alerts, newsletters, and resource booklets targeting new funding opportunities and other non-profit resources often complement these. You should visit their sites regularly as funding programs do often change while new ones announced.

You will also find that most corporations have well-organized web sites, clear guidelines and easy online applications. Private foundations, however, can sometimes be a challenge to find. Some foundations have websites while others may require more digging through databases such as the Revenue Canada Agency charities listing, http://www.cra-arc.gc.ca/charitylists/ or more expensive databases such as Imagine Canada or GrantStation.

Tips for Finding the Right Funding Sources	
ACTIVITY	**WHY?**
Utilize websites and search engines like google.	Websites and online searches are a good way to explore a wide area of information, very quickly. Keep looking! You may have to dig deep to find grant information that suits your needs.
Investigate public libraries.	Sometimes librarians can be a key source of help in identifying certain data or locating foundation directories and computerized databases. Ask!
Look for a match between your ideas and those of the funding agency.	Submitting proposals/grant applications to only funding agencies that would be interested in funding you saves time and money!
Make direct contact by phone.	Find out if your idea is reasonable, and if there is interest by the funder.
Request for proposal guidelines includes key information like submission deadline, eligibility, award level, funding priorities and contact info. Read thoroughly and highlight key points!	Make sure your proposal or application exactly matches the requests and needs of the funder. Organize according to THEIR criteria not yours!

Google is your friend

Google and Yahoo searches offer a very robust way of finding web sites containing funding opportunities. In many cases, a modified question used as the search text string will identify funding directories, help narrow the focus of the search, and in many cases identify other or new funding sources. The search text may be as simple as “funding arts and culture,” “grant green programs” or “funding affordable housing.”

List of Funding Directories, Resources and Tools:

- CharityVillage is an excellent online resource for Canadian non-profit with news, how-to information and an extensive funding directory. http://charityvillage.com/

- Lakeland District for Sport, Culture and Recreation Community Resource Manual - http://www.lakelanddistrict.ca/pdfs/2012/CommunityResourcesManual.pdf

- Saskatchewan Parks and Recreation Association Grant Opportunities Booklet - http://www.spra.sk.ca/funding/grant-opportuntiies-booklet-march-2013.pdf

- Fundsnet - http://www.fundsnetservices.com/

- Saskatchewan Urban Municipalities Association (SUMA) http://suma.org/

- CEGN (Environmental) http://www.cegn.org/english/grantmaking/dbintro.html

- SaskCulture Inc. is a non-profit, community-based, volunteer-driven organization that works toward building a culturally vibrant province through membership benefits, training and funding opportunities. http://www.saskculture.sk.ca/

- TechSoup Canada serves non-profits by providing affordable access to technology and software. http://www.techsoupcanada.ca/

Funding opportunities and information management

Searching for funding can be an overwhelming task. Developing a structure for collecting and saving this information will help you keep it organized and easy to access. You may find it useful to set up email folders or create a "Hotlink Table of URLs" to serve as a single document tailored to your needs. Alternatively, you might want to create an excel spreadsheet with agency name, contact information, web link, request amount, deadline date and a short synopsis of the agency. If you prefer hard copy files, just print a copy of the agency's request or guidelines and file into a binder or folder.

In the next chapter, you will learn how to analyse funders in ways that will help you successfully match your project with the ideal funders. Please feel free to reference the "project plan and funding prospect assessment tool" (Worksheet 2) while you work through this section. The worksheet is a great resource and an excellent tool for matching your projects with funders immediately and in the future.

Worksheet 2: Project Plan and Funding Prospect Assessment Tool

CHAPTER 4 ANALYSING FUNDING SOURCES

Grant writing is what you do when you write a granting request – also known as a proposal for funding.

A grant is a conditional gift or conveyance of funds with strings attached. The strings will vary from funder to funder, but typically include public recognition and a final report after the project's completion. A grant is also a cooperative agreement or, a request in an advance promise of what the grantee proposes to do with the grantor's money.

What is the purpose of a funding proposal?

A funding or grant proposal is the tool that will help you "sell" or persuade an agency (or donor) to give you money for your project. The purpose of a funding proposal is to convince the reviewer to support your project based on a need or problem, and a good solution. Therefore, while your task is to describe the project to the funder, you should do so in a way that persuades them to "give you the money."

The most common reasons for an organization to seek funding include:

- Funds are required in order to access the necessary resources to run a program, supplement a capital project or operate an organization.
- An organization might decide to "diversify" their funding base, or rather, have more than one funder who supports their organization or project.
- A proposed project might fit closely with the criteria, priorities or broader framework of a local, regional or national granting agency, foundation or corporation.
- An organization or project has expanded its scope or recently experienced a growth period that has increased operational or programming demands. More funds are necessary to develop or sustain this growth.

PLEADING THE CASE FOR FUNDING

Similar to a lawyer pleading a case or a debater making a point, a proposal writer must build a logical argument that justifies funding. The main reason a proposal fails is that it does not make sense. The idea might be good, but it lacks coherence and sound logic to back the request.

Who is the funding proposal for?

To put it simply, write the proposal for a funder. The effectiveness of your proposal will depend on developing it with a specific funder in mind. In order to write a good proposal, you must make an informed decision about the agencies that you choose. This means learning as much as you can about each potential funder. Different funders have different priorities and interests. Approaching the wrong funder wastes their time and yours. Preparing an effective proposal requires you to consider the "who":

- "Who" meaning what funding agency do you have in mind?
- "Who" meaning what sort of person or committee is likely to read the proposal?

Why is this important?

Matching your project to the interests and priorities of a funder will greatly increase your chances of success. If you have only a little experience, it may be helpful to speak to other non-profits about their own experiences working with different agencies. However, the best idea is to contact an agency directly and speak with the officer. Making contact with an officer prior to drafting or submitting a proposal can greatly increase your chances of success.

85% of successful grantees contacted the program officer prior to drafting a proposal.

Additionally, taking the time to understand the mission, priorities and culture of a funder will greatly enhance the quality and persuasiveness of your proposal. Knowledge about an agency will help you make better decisions about how to develop your proposal because you will have gained a deeper understanding of how your project fits within their investment priorities.

REMEMBER!

Agencies will fund good ideas that are clearly developed and linked to their mission, vision and strategic plans or priorities.

Studying the funding agency

Studying a potential funder will help you to realize that they are not just passive grantors. Funders generally view themselves as leaders in the community and supporters of local, regional or national issues or causes. Funders support people—and programs—that fall within the scope of their mission, values or priorities. This is often a source of frustration to applicants who believe that a good idea alone should merit funding—and even if their project is completely disconnected or only vaguely attached to an agency's priorities! Simply put -- this is a failed approach.

Know the donor

Remember, at its heart, a funding proposal is a tool used for persuasion or selling. Anyone in the retail world will tell you that when you sell something, you need to know what that prospective "buyer" really wants. Funders are essentially buyers who have agendas or sets of values (priorities) that direct how they "spend" their money. Remember, it is not ALL about you or your cause. The funder is a potential stakeholder too!

What do donors want?

Most donors want a range of things for their investment. As outlined in the chart on page 9, their priorities or strategies may be vast, but will be very quantifiable and characterized by the following:

- To make an impact or a difference – they want their money to count, they want the work they fund to be successful, and they want to be a showcased in a positive or successful manner.
- Be publicly aligned with causes or projects that have shared values, demographics or investment priorities.
- To acquire knowledge, understanding and information.
- To share knowledge, understanding, information, and in so doing, adding value to their chosen interventions.
- To increase their influence in addressing what they consider are the problems of the world, the region, the country, or within their own community.

What does it mean to prepare a funding proposal?

It means most importantly, that your overall agenda must not differ too much from that of the funder's. If your organization supports the arts, for example, then it does not make sense to submit a proposal to an athletic agency or company (unless the arts is one of their priorities!). Your proposal must persuade the funder to support your project—one that they can be proud of or identify with (or those they want to influence) and that aligns with their values. People identify with people. This means that you must tell a human story, not just a dried up summary about your project.

REMEMBER!

Analysis of the funding agency will help you focus on key elements for your proposal:

- Who is the audience (e.g., agency, program officers, and reviewers) and what is the best way to address them?
- What is a fundable idea and how best to characterize it within the context of the agency's investment priorities?
- How are claims of the need best supported in the proposal text and do they reflect the agency's priorities?
- How does the applicant best communicate his or her passion, excitement, commitment, and capacity to perform the proposed review panels?

A funder that is inspired or moved by your project will want to add value to its own name or priorities by supporting or contributing money to your cause. To a greater or lesser degree, this also means that they have a speciality (or values) and want to fund a project that fits within that specialization (or set of values). The more you know about the funder, the more likely you are to choose one that is the ideal match. It also means that your research on the funder will contribute directly to your ability to develop a persuasive and logical proposal.

The packaging

Whatever the funder requests for a proposal, they will expect to see it well packaged. Therefore, this means getting the presentation right too. Once you have discovered that your goals and values align with the funder's, you must then follow what the agency requests in terms of packaging. This includes formatting, what details to include, order of information, number of pages and so on and so forth.

The administrator or program officer will provide you with all of the information that you need for presenting the best package. This initial contact is very important. It can set the tone for any future relationship, and even increase your chances of writing a successful proposal. Here is a list of information that you will need, and of which, you can usually find on the agency's website, in the guideline package or by direct contact:

- Name, address, telephone and fax numbers, e-mail address, name and title of the contact person.
- The goals, mission and concerns of the funder, including areas of interest, whether it funds particular geographical areas only, what its funding criteria are, or what else it funds.

- What size of grant the funder usually gives. Most funders will have a listing of grantees from previous years on their website where you can explore who they have given funding to and what their average "give" amount may be.
- What the funder's decision-making process is and how long a decision is likely to take once you have submitted a written proposal.
- The dates when proposals are considered and the dates/deadlines for submission of proposals.
- Whether the funder has a special proposal format or guidelines that you should follow. Some funders may want a short preliminary proposal (referred to as a Letter of Inquiry) before asking you to complete a full proposal.

The personal contact

It is essential to remember that funders are representative of the people – the administrator, program officer, regional development officer, board of directors, or review committee. These are people with concerns, interests and enormous demands on their attention and time.

What does this mean for you?

- You must communicate professionally with the funding representatives. Do so with purpose and do not waste their time or yours.
- You must be honest and open when you communicate. Be prepared to listen and to share information and ideas.
- You must project the human side of your organization or community so that the funder is able to identify with your project or proposed idea at a human level.

In summary, the initial sequence of events for developing a proposal is to:

- Make some general inquiries about appropriate funders.
- Do a detailed assessment of the funder to determine a good match.
- Follow up by making contact with a program officer.
- Begin work on the planning stage of your proposal.

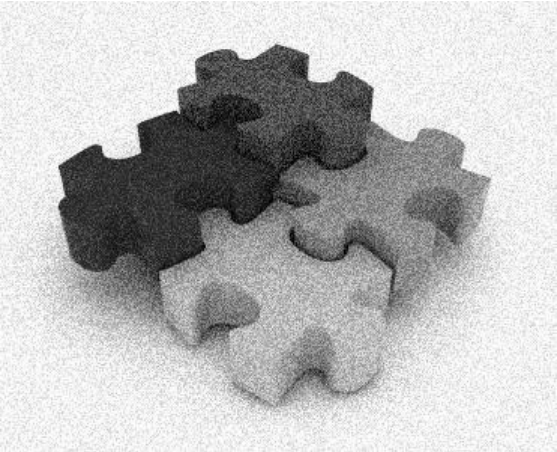
However, before you even begin addressing the above, there is one more essential ingredient for your recipe to success. You need to know yourself! This means that you must know your organization and understand your project. Why? Because the "buyer", investor or partner has to believe in and be persuaded by your organization and the presentation of your project.

In the next chapter, we will cover the reasons why knowing yourself is such a key step, and what the process will be for performing a good self-inventory of your project, program or organization.

REMEMBER!

Pay close attention to the deadline date and submission requirements. Why? Some agencies will request that the application package be submitted to the office OR postmarked with the deadline date (sometimes both). Online applications may have a certain date or a time deadline (4pm or Midnight).

CHAPTER 5 KNOW YOURSELF – ASSETS INVENTORY



A strong proposal will open the door to a funder who wants to support a cause that they can get behind. The key to ensuring that you have made the ideal match is by first assessing and laying out your own values, mission, priorities, demographic, strengths and weakness, needs and outcomes.

How does "knowing yourself" help with the proposal process?

It makes the process a whole lot easier. It can be very difficult to sell or promote your project if you do not even know, and cannot present, a clear picture of who you are and what your need is. This means that you will be unprepared in showing how your project is a "good" versus "bad" risk or the impact it will have on your community. Imagine that your project and a funder are two pieces of a larger puzzle. Essentially, your goal is to know yourself well enough that you can create a persuasive picture of how that funder fits into your puzzle.

Many organizations make requests to funders. Now, think about how many applications that might be. Probably hundreds! The goal is to make sure that your proposal stands out—in fact, shines brightly. Funders are in the "business" of giving money or investing in projects that give value. When a funder makes that kind of investment, your project must be both a good risk and a good fit – one that will make the funder shine through the impact (or promotion) of the project. Knowing yourself will give you that necessary edge in creating a persuasive picture (story) of why their contribution is so vital. To achieve this you will need to "know" the following about "yourself":

- Who you are, what your identity is.
- What your strengths and weaknesses are as a project or organization, and what opportunities and threats confront your organization or project (see SWOT Analysis or Asset Inventory Tool).
- Your record of accomplishments (what you have achieved and what you can show from past work that will give a donor the confidence that you are a "good risk").

Organizational identity or profile

The organizational profile will help you to present yourself as a unique, accountable organization that is competent to achieve its goals and objectives.

To present your identity appropriately, you will need to gather and compile the following information:

- An overall mission and goal for the organization – why it exists, who it benefits, how it is linked to the intended beneficiary community and what it plans to achieve through its work.
- A visible and recognizable identity in the form of a logo or promotional strategy and campaign.
- A Board of Directors provides the organization with a credible governance structure. This means developing a short biography of each person that reflects his or her education, experience, community links and cultural background.
- Key staff or volunteers are in place to make the organization and proposed projects happen. Here too you want to present brief biographies about the people central to the project and show why they are appropriate.

Worksheet 3: Asset Inventory Tool and Worksheet

SWOT analysis

A SWOT analysis is a simple planning tool that can help you to identify the **S**trengths and **W**eaknesses, as well as the **O**pportunities and **T**hreats facing your project or organization. This analysis will show funders how your project will build upon your strengths, address your weaknesses, use the opportunities and confront the threats. Essentially, this shows a funder that you have a realistic picture of the project, and the insight and determination to ensure that its goals are achievable and sustainable.

Remember that strengths and weaknesses refer to **internal factors** while opportunities and threats refer to **external factors**. So, for example:

A strength might be:

Experienced and committed staff

A weakness might be:

Insufficient technological skills among the staff

An opportunity might be:

Government policy supportive of the kind of work the organization does

A threat might be:

Current donors have changed their focus

The chart below is a great tool to use for developing a SWOT profile of your organization or project. Do the exercise as a team or distribute to individual members for compiling and assessing later on.

Strengths	**Weaknesses**
Opportunities	**Threats**

Know your track record

Remember, if a funder supports your project, they are taking a risk, so you must present evidence that shows it to be a "good risk." The Asset Inventory Tool can help you to accomplish this task. As well, here a list of areas that will help you to highlight your project's feasibility and/or your capabilities:

- Previous results and impact.
- Good management competence with regard to projects and people.
- Good financial management skills and strategy.
- Technical competence, knowledge or expertise in your particular field.
- Public recognition such as awards, publicity or published research.
- Letters of support or feedback from those who have benefited from your program or collaborated with/supported your organization.

Where will you find all this evidence?

The organization's annual report is a useful place to start. It usually contains details of projects that have happened during the year, board members and staff, and some feedback on impact in relation to activities. If you do not have an annual report, then you may need to sit down to write or gather the contents for this inventory. Refer to previous grants, planning documents or promotional materials. For finances, a copy of the most recent audited financial statements or a profit/loss is useful. These documents can also be included as support material. If your organization is new, it will be a bit more difficult to show that you are worth a risk. **Nevertheless, you can still present this evidence by:**

- Enlisting the written support of credible governance members and patrons.
- Getting a letter from credible accountants to say that you have set up a good financial management system, with appropriate checks and balances.
- Compiling information about staff members and/or volunteers that reflects each of their accomplishments on similar projects.

In summary, before you get to the project details, the funder will want the following from you:

- Your name and position in the organization or project.
- The name, contact details and business or charitable number of the organization.
- What community you serve and what your links to the community are.
- The mission, goals and strategy of the organization.
- What your governance structures are and who is on them.
- The level of expertise of the staff and/or volunteers involved.
- Your particular strengths as an organization in the context within which you function.
- Your record of accomplishment in terms of impact, competence, project and financial management.

Now, one other area needs your attention before you draft that winning proposal! Before you dive into that first draft, you need to map or plan out your project in detail.

REMEMBER!

Don't Chase the Money!

All too often, community organizations start by identifying a grant possibility, and only then make decisions and plans about their project. This practice can lead to a group running programs that they may get funding for, rather than running programs that come from a genuine need within the community. Trust your knowledge and understanding of your own community, and find money to fit your vision, rather than fitting your vision to a call.

Planning the project

The initial step for developing a project plan is to make a strong link between your organizational mission, strategy and the project itself. It can be a serious mistake to make the search or discovery of a funding source your starting point: "How can we get this money?"

A project is a response to a need, a problem or an opportunity in your environment. The whole point of building a project plan is that you want to respond to an expressed need or problem in your community. Thus, it is from within the "need" that the goals and objectives of your project will flow. Essentially, the goals and objectives are the methods by which your project will offer to address the need or present a solution to the problem. In the context of raising funds, your project plan and request for funding should be perfectly in line with this need and solution.

Develop your project plan based on the following elements:

- Your understanding of the context of the project.
- How the project connects to the organization's mission and strategy.
- What the need is and how you will address it.
- The goals and objectives of the project.
- The process and/or activities that will achieve the goals and objectives.

Know the context

Funders have many demands on their resources. They have to decide where best to use them, in terms of geographical area, region, issue or challenge. This means that you must contextualise your project in such a way that you clearly show how it:

- Fits with the funder's values or priorities.
- Tackles the need or opportunity in a unique or significant way.
- Highlights potential learning or outcomes that are meaningful and achievable to the beneficiaries.

Other more common areas that you may want to explore:

- Country, region, area details (location in region, government, population, etc.);
- Demographic served.
- Any important statistical data or research that supports the need or sheds light on the problem, and shows how the project will benefit the demographic or make an impact on the community.

If, for example, your organization wants to establish a new folk festival, you may want to include other information, such as the number of people who do not currently have access to live music performances in your area. A good example of a goal for such a festival might be:

There will be an increase in the availability of live musical performances for rural people in XYZ by the year 2014 because of our annual folk festival.

What other information can help with context?

From the example above, you may then include data comparing the number of festivals in urban versus rural areas, or show how access to live music will benefit the arts or community (economic, educational, enjoyment, vibrancy). However, do not write a thesis! You simply want to provide useful information that gives CONTEXT to the reader—including potential impact. Do not overwhelm them with details. At this stage, you also need to be clear about your goals and objectives.

REMEMBER!

- Layout the 5 Ws: who, what, where, when and why.
- No one sends money to strangers.
- Money comes from the heart (human stories) and the brain (feasibility).
- Bring your thoughts to life in a way that conveys true and serious need.
- Use powerful words to paint a picture of the need, problem or opportunity.

Goals and objectives

Now you need to define the objectives and what those objectives are intended to achieve. A good objective usually states:

- What you want to achieve (your ends).
- How you want to achieve it (your means).
- Who the main beneficiaries will be (your audience or participants).
- How your methods will measure the outcomes (your results).

By "main beneficiaries", we mean the "end beneficiaries." In a project that focuses on improving adult literacy by training tutors, the end beneficiaries are the adult learners, not the tutors. The focus should be on how training the tutors will help the organization achieve its objective of increasing literacy for a targeted adult population.

Another example might be improving the physical access to a viewing area of a facility where youth engage in gymnastics or dance programming. The objective is to create an environment that will enrich **their** experience of the physical arts by ensuring that **their** achievements will be accessible and appreciated by **their** family or peers. The facility upgrade will help to ensure that seniors, parents, siblings or friends who face physical challenges will have proper access in order to be a part of the program's effectiveness and objectives (solution).

Here are two examples of an objective:

1. *There is an increase in the literacy of adults in XYZ by the year 2014 because of better adult education and literacy practices.*

2. *Women heads-of-household living in the ABC region of XYZ improve their standard of living by the end of 2014 through the development of literacy skills training that will increase their opportunities for employment and will supplement generational learning at home.*

What is the difference between these two objectives?

Can you see that one is very broad and one is very specific?

Most projects need both general and specific objectives:

Objective 1 is a general or overall objective (also sometimes called a "goal").

Objective 2 is a specific objective (also sometimes called a "project purpose").

Overview of planning objectives

The general objective or goal:

- The general objective or goal provides a benchmark against which the success of your project and that of others with a similar purpose are measured.
- The general objective or goal must be compatible with your organization's mission statement and with the mission of the donor to whom you are applying for funds.
- It will usually take longer to achieve the general objective or goal than to achieve the specific project purpose. (Long term versus short term).

The specific objective:

The specific objective is something that your project is able to achieve and measure through its work. It is a result that should be feasible in the time specified, and is the core strategy that makes a positive contribution by addressing a particular need, problem or opportunity for a specific area or group. A project may have more than one specific objective but it is best to focus on the most important one(s):

- The more specific the objective is, the easier it will be to design a process for achieving it.
- Include specific targets, e.g. how many women heads of household will improve their standard of living and by how much? This ensures the inclusion of indicators against which you can measure your progress, e.g. employment for participants, literacy improvements via testing.
- The project achievements are what measures its success. So keep them feasible! Do not promise the impossible by overestimating your skills or capacity.

Why do you need objectives?

Objectives will map your project with terminology that will help to direct your activities in a language that speaks to or echoes the funder. Essentially, your objectives serve two purposes:

1. **Your objectives will tell the funder:**
   - Whether or not the project fits within its own priorities.
   - How clear you are about what you are trying to achieve.
   - Whether or not you are realistic and, if so, whether or not the project is likely to have a useful impact.

2. **Your objectives will help your organization:**
   - Clarify the strategy required for achieving your goals.
   - Give you a framework for your project plan or design.
   - Provide a "reality check" for the feasibility of your project.
   - The objectives link the project to the mission and goals of the organization.

Worksheet 4: Project Planning Tool

Designing the project plan

Worksheet 4 is a useful tool that will help you map out all the elements of your project plan—including how you are going to achieve your objectives. The design process is as a systematic process that begins with the need, moves to your objectives, activities and then ends with your outcomes. The creation of a project map will require you to answer and clarify the following questions:

- What is the need?
- What will you do?
- Where will you do this?
- How will you do it?
- Who will be involved?
- What outputs will there be?
- When will the various activities and outputs happen?
- How will progress be monitored and the project evaluated?
- How will the project be evaluated?
- What resources are needed to carry out the activities?

Why is it necessary to do all of this planning before writing the proposal? The more you know about your project, the clearer your funding goals will become and the more concise your proposal will be. It is as simple as that. Laying the groundwork means that you can write a proposal that is coherent, logical, appropriate, and ultimately, more successful.

Worksheet 5: Strategic Planning Tool for Developing a Blue Print

REMEMBER!

Every program is based on a "theory of change" - a set of assumptions, risks and external factors that describes how and why the program is intended to work. This theory connects the project's activities with its goals, objectives and outcomes. It is inherent in the project design itself and based on knowledge and experience of the project, research, evaluations, best practices and lessons learned.

Creating a road map using the logic model

A logic model is a visual expression (road map) of the rationale behind a project or program. This tool will help you to outline the intended results of the program, activities the program or project will undertake and the outputs it intends to produce to achieve the expected outcomes.

LOGIC MODEL CHART

COMPONENT	DESCRIPTION	EXAMPLES
INPUTS	Resources dedicated to or consumed by the program	● Money ● Staff & staff time ● Volunteers & volunteer time ● Equipment & supplies ● Transportation
STRATEGIES	What the program uses to organize the inputs to fulfill its mission.	● Provide … ● Educate … ● Counsel … ● Create … ● Conduct …
OUTPUTS	The direct quantitative product of program activities.	● Number of classes ● Number of sessions ● Number of educational materials distributed ● Number of hours of service delivered ● Number of participants served
OUTCOMES	Benchmarks for participants during and after program activities	● New knowledge ● Increased skills ● Changed attitudes or values ● Modified behaviour ● Improved Condition ● Altered status
IMPACT	A change in systems and processes after the funding is expended.	● New approaches ● New services ● Stronger partnership working agreements

CHAPTER 6 READING THE PROPOSAL REQUEST

The application or proposal request is the introduction to or guideline for the proposal writing process. Essentially, a request is an invitation by an agency for the submission of a formal proposal by an applicant in the areas of interest to the agency.

The request and/or application guideline is what you will use as the reference point for each stage of the proposal planning and writing process. This will ensure that the need and the narrative fully addresses and accurately reflects the goals and objectives of the funding agency—including its match with the review criteria.

The application guideline contains most of the essential information that the proposal writer will need to develop and produce a proposal that:

1. Clearly outline the needs, objectives, activities and outcomes of the project; and
2. Is fully responsive to the funder's objectives, priorities and review criteria.

Identify the contents

The application guidelines typically include these items as listed below:

A. Application Form
B. Organizational Profile (mandate, vision, history of achievements, governance structure, key personnel, financial management)
C. Project Summary or Abstract
D. Proposal Narrative – Need Statement, Objectives and Activities (methods)
E. Project Budget
F. Support Materials (letters of support, financial statement, brochures, posters)

Review the application

The application is not a document that you read quickly, lightly, or only once! The guidelines give a very detailed picture of the funder's expectations for developing the format AND content of a competitive proposal. It needs to be read and re-read, and understood fully, in detail and as an integrated whole. The guidelines will set the direction and define the parameters of your proposal. Highlight key areas such as deadlines, eligible costs, review criteria and format specifications for reference.

Call the program officer!

If any confusion or questions arise, you should call the agency and get clarification from the program officer. A well-written set of guidelines will clearly state the agency's objectives. However, guidelines are not all written equally. Therefore, never be timid about asking for clarification! **One major variable in successful funding is contact with the program officer.** Keep asking questions until you are satisfied. Clarity about the request is critical to writing a successful proposal.

IMPORTANT TIPS

1. Read the criteria carefully prior to and while building your grant application.
2. The criteria will tell you what peer reviewers will read and how they will rate it.
3. Check for due dates, number of awards, average size of grants, and eligible applicants.
4. Always follow the order of information and leave nothing out!
5. As you read the application guidelines, highlight all narrative writing requirements and look for rated areas.
6. Formatting grants to match ratings will increase your competitive edge.
7. If you are confused or unclear about any of the criteria please do not hesitate to contact the officer or person in charge of the program. They are there to help!
8. Do your homework! Provide statistics and facts regarding the problem that your organization is trying to solve.
9. In the case of corporate grants, be sure to spend time at their website learning their values and community initiative directives.
10. Use a checklist and make sure you have not left anything out. Otherwise, you will risk disqualification or lose marks (i.e. ED or president signature, number of copies, page numbers, attachments, organizational information, etc.).

The role of the proposal guidelines

In addition to referencing the agency's priorities and criteria, the guidelines give important instructions to the packaging of your proposal. Use the guidelines to develop the structure of the proposal narrative, as well as the template for sequencing and the headings for each section. For example, selectively copy and paste the headings into the first draft to map the process. This ensures that the request functions as a guide while also making it easier for reviewers to connect your proposal to the review criteria.

Identify and address the review criteria

Most agencies publish their review criteria on their web pages and/or in the request guidelines. The review criteria is an especially important part of the funding request. Why? Typically, reviewers will

assess the proposals while marking them against the criteria. The more your proposal aligns with the criteria, the higher your overall mark is likely to be. The higher you are on the list, the more likely you are to receive funding.

Thus, a competitive proposal must clearly address each review criteria, and the proposal structured in a way that this criteria is easy for them to find. Subject headings, graphics, bullets, and bolded statements using similar language will make the reviewers' job easier to assess and rate the proposal.

REMEMBER!

Most agencies subject applications to both a merit review and an administrative and/or feasibility review. The reviewers will evaluate the following:

- The quality of the proposed project or program
- The degree to which it meets the agency's review criteria
- The ability of the program to achieve its goals, objectives and outcomes.

Understanding the review process

When evaluating a grant application, reviewers will not only consider the quality of the ideas and its feasibility, but also the extent to which the application addresses the agency's review criteria and priorities. The review process varies – sometimes significantly – from one agency to the next. The review process may include a peer review, where outside experts in related fields or disciplines will review the proposal; an internal review, where agency personnel evaluate the proposal; or a combination of both. However, most review processes do share one common feature: the applications will receive both a merit review and an administrative or feasibility review.

The review, step-by-step

1. The review process starts as soon as the agency receives the application. The agency will log the application, check it for completeness and route it to the appropriate program. At this point, the review panel will receive all of the applications from the officer. Review panels (juries or committees) vary in size, but will usually include experts, peers or program officers.

2. The review panel will conduct a merit and feasibility review of the application to evaluate the quality of the proposed project, the degree to which it addresses the agency's mission and meets the review criteria, and if it is a feasible project.

3. Reviewers will evaluate the applications, and then e-mail their reviews or travel to meet as a panel. During the panel, reviewers will discuss the merits or problems of each application. Once this process is completed, the reviewers will be asked to rank the applications and/or identify which ones are meritorious, i.e., worthy of funding.

4. After the review panel adjourns, some agencies mail or e-mail the organization a letter of acceptance or rejection. With a rejection letter, be sure to make contact with the program officer to learn more about reviewer comments,, where the proposal ranked, and what areas need improvement for future submission.

Know the reviewers

While it is important to identify the review criteria and understand the review process, it is equally important to identify who the reviewers will be. Some panels include a jury of peers from mixed disciplines, while others are a panel of professionals who may or may not be familiar with your region or sector. Therefore, it is imperative that you write your proposal from the point of view of a reviewer who knows nothing about your project or organization. The proposal must tell a compelling story about who you are, what you do, who you serve and what your strengths or capabilities are.

Write for the reviewers

It is easy to forget that real people review your proposal. Reviewers are smart, compassionate, accomplished, dedicated, and human. In short, your proposal should expedite and inspire their process, not confuse it. Most reviewers will have to go through a multitude of proposals. Make sure that your proposal has all the required elements in an easy-to-read and compelling manner. Present the project with enough clarity that the reviewers will grasp the ideas in ways that persuade them to advocate on your behalf. Thus, be sure to incorporate reviewer-friendly text, formatting, and graphics that will greatly enhance the effectiveness of your proposal.

CREATE REVIEWER-FRIENDLY TEXT

Techniques for developing reviewer-friendly text include the following:

- Divide the proposal into the required sections with headings.
- Place the sections in the proper order.
- Use logical paragraph breaks.
- Open paragraphs with clear topic sentences.
- Discuss important items first.
- Avoid the use of inflated language or obscure words.
- Use declarative sentences.
- Define potentially unfamiliar terms.
- Spell out acronyms and abbreviations.
- Employ appropriate style and usage.
- Use correct grammar, punctuation, and spelling.
- Run a spell-check and proofread the application.

CREATE REVIEWER-FRIENDLY FORMATTING

Techniques for developing reviewer-friendly text include the following:

- Follow page limitations for both the whole proposal and for individual sections.
- Conform to margin requirements.
- Conform to font and point size requirements.
- Incorporate headings and subheadings to provide a “roadmap” for reviewers.
- Incorporate ample white space
- Incorporate page numbers, headings and label support material or appendixes.

OTHER REVIEWER-FRIENDLY TIPS

- Use many headings.
- Use numbered and bulleted lists.
- Keep paragraphs short, no more than 3-6 sentences.
- Use 12-point Times New Roman font (preferred by 80 percent of agencies).
- Stick with one font to avoid a jumbled appearance.
- Avoid using all capital letters (except for section headings)
- Underline sparingly.
- Use boldface and italics to emphasize key words and phrases.
- Never write in first person.

CHAPTER 7 DRAFTING THE APPLICATION

Grant proposals are a key part of any fundraiser's portfolio. Grants may come from a variety of sources, but most require the same basic information in the proposal. Writing the proposal is the most important task. However, your attention to the finer details of the package will make or break the success of your request. Most funding agencies provide a detailed list and description of what they require in the proposal. The guidelines will vary from one agency to another and some offer no guidelines at all!

A. **Cover Letter**
B. **Application Form**
C. **Organizational Profile**
D. **Project Summary**
E. **Project Description**
F. **Project Budget**
G. **Support Materials**

PLEASE NOTE

Not all agencies or funders will require applicants to include the information listed, nor will they require it in this order. You may find your own style of presenting, or follow the outline here, which is effective. However, REMEMBER, always follow the guidelines where requested!

A. Cover Letter

A cover letter introduces your organization to the correct person, will show the funder the project has board support, and will clearly state what you are asking for, how much and for what. Use a cover letter for corporations and foundations. Federal, provincial or municipal grants rarely require a cover letter.

Attributes of a good cover letter

In the case of a corporation or foundation, your cover letter should be no more than one page, gets to the point quickly and captures the attention of the reader. Beverly A. Browning, author of Grant Writing for Dummies, suggests that you write the cover letter after you have completed the proposal and are in a reflective mood. In her book, she writes the following:

"As you consider your great achievement (the finished funding request), let the creative, right side of your brain kick in and connect your feelings of accomplishment to the person who will help make your plans come true."

The cover letter is an opportunity to appeal to the heart side of the reader while also showing the logic of your plan. On the next page, we have included a sample cover letter that will give you some idea of how to construct a good one page cover letter that shows who you are, what the need is and why you are requesting funding. For a more "heart-felt" example, I would encourage you to visit this page: http://www.dummies.com/how-to/content/how-to-write-a-grant-application-cover-letter.html or refer to page 157 of Browning's Grant Writing for Dummies.

A sample cover letter:

Ms. Beth Brown
Program Officer
Community Foundation
4321 Common Lane
Some Town, SK S7K 4L3

Dear Ms. Brown:

The Some Town Senior Center is respectfully requesting a grant for $20,000 for our Senior Immigrant Community Outreach Project. As the only senior center in Some Town, serving over 135 seniors each day, we are aware of the changing demographics in our service area, and are committed to growing and adapting our services to meet these emerging needs. The Senior Immigrant Community Outreach Project will help us to initiate our efforts in determining whether we can effectively (1) provide comprehensive access to health and social services to immigrant seniors in our area, and (2) fully integrate the cultural competency of the board, staff, and volunteers of the Some Town Senior Center.

Our board of directors is enthusiastic about this project and are eager to launch our effort to be an inclusive and culturally competent center for immigrant seniors. Should this program be successful, our board is committed to integrating a portion of expenses for this initiative into our annual operating budget so we can offer the program as part of our core services.

Through the project, the center will serve as the primary referral point for Health Access Immigrants, Open Door Society, and the community clinic in our area. We will also take referrals of Immigrant seniors from other community agencies in our immediate service area.

Thank you for your consideration of our request. I will follow up with you in the next week to answer any questions you might have, as well as to learn whether there is a possibility of meeting with you to discuss the merits of our proposal. Should you have any questions in the interim, please feel free to contact Jennifer Stone, our Program Director, at (333) 333-3333, x333, or jstone@stsc.org.

Sincerely,

Carl Happy
Executive Director
ENCLOSURE

GUIDELINES FOR FORMATTING A COVER LETTER

- Use your organization's letterhead. Put the same date on the cover letter that is on the completed application. Keep the documents in your proposal package consistent.

- For the agency address (top of letter), use the foundation or corporate contact name and title, following by the funding source's name, address, city, province and postal code. Double-check this information with a phone call or email.

- Your first paragraph should be short and focused. Introduce your organization (its legal name) and tell the funder how much money you are requesting and why. Include a sentence or two about what your organization does, and then one research-based point or fact that shows there is a need for what your organization or project does.

- Write one or two more paragraphs that are very brief and succinct. Include purpose, and how it fits with the funder's mission or funding priorities. Include the fact that your board of directors is in full support of the project.

- End your letter with a final, summarizing paragraph. Include a thought about what this funding partnership can mean for your project's target audience.

- Use closing such as "Sincerely."

- An executive director or the board president, or both should sign the letter. Below the signature, type the signer's first name, last name and job title. Although the ED or board president should sign, the contact person and information can be included at the end of the paragraph.

- At the bottom of the letter, include the word, "ENCLOSURE" (in all caps).

B. Application Form

The application form is an essential part of the application package. It is important that you complete all of the requested areas, which typically include contact information, contact name and title, charitable tax or business number, requested amount, project dates, project summary and the submission date with signatures. **Always adhere to the following when filling out the application form:**

- Write legibly.
- Double-check all contact information.
- Be sure to include business or charitable number.
- Be sure the requested amount matches your budget.
- Scan or photocopy the signed copy for your records.

C. Organizational Profile

This section of your proposal should be as concise as the rest. Stick to the information that will establish your organization's credibility and ability to accomplish the goals and objectives of your project. You should include the following information in this section:

- The full, legal name of your non-profit and its legal status (non-profit or charitable).
- The history of your non-profit – including your mission or mandate statement, when it was founded, who founded it, for what purpose, and the community and/or clients it serves.
- A summary of your programs.
- Your organization's position and role in the community. Mention any collaborating partners.
- How your organization is unique. Explain why your services do not overlap with other services.
- Your organization's most important achievements that relate to this proposal. Include awards or special recognition. Consider using a bullet format to lay these out.
- A brief statement or organizational chart with your board, staff, membership and volunteers.

D. Project or Executive Summary

An effective abstract or proposal summary is a brief, one-page or two-paragraph overview of what the grant reviewer will find inside the full grant application. It should accomplish several things:

- Provide the reviewer with an overview of the conceptual framework of the proposal.
- Offer a “roadmap” for the rest of the proposal that will give the reader a clear idea of where the proposal is going and how the sections will fit together.
- Grab the reviewer’s interest, communicate excitement and generate support or enthusiasm.

How you write the summary will depend on the goals, criteria, and priorities of the agency, your organization and the reviewer. A well-written summary invites the reader to explore further, and delivers the bones of what you are asking for. Use your skills to persuade the reviewer that your project is worthwhile by ensuring that they understand the need and expected results.

The summary can be one of the more challenging areas of the proposal narrative as it requires completeness and brevity. Author of Grant Wring for Dummies, Dr. Beverly A. Browning, suggests that you create an abstract or summary by pulling key sentences from each section. You can do this through a quick cut and paste, and then build the summary from there. This will ensure that you have captured all the key points while maintaining the order as they appear in the proposal. Additionally, you can also use the answers from your project planning tools to flesh out the summary.

1. **Proposed Initiative:** Name of your project or program and the full name of the funding category or grant program of the agency.
2. **Introduction of Target Population:** A sentence or two about the group you are planning to target and serve with the project or funding.
3. **Goals:** Include goals from the project design section of your proposal narrative.
4. **Program Measurements and Outcomes:** Copy and paste your objectives and performance targets from the project design section of your proposal.
5. **Plan of Action:** Highlight key activities that comprise the programs implementation process.

TOP FIVE GRANT WRITING MISTAKES

- **Talking more about the problems than solutions**
  A proposal is not a brochure for educating the public. Show that you are familiar with the issue and focus on what you will do about the problem or need.
- **Addressing specific problems with general solutions**
  Do not just speak eloquently about the problem, but also provide concrete and/or specific details about the actions you will take to address the problem.
- **Using buzzwords and jargon**
  Use simple prose that "tells a powerful story or paints a vivid picture" of the problem and the solution. Avoid vague claims, trendy language and obscure.
- **Budgets that don't make sense**
  Many proposals have budgets with math errors, which undermines the applicant's credibility. Budgets should add up and support the proposal narrative.
- **Repeating exact phrases from the funder's guidelines**
  Writing a proposal that resonates with the funder values or its priorities can be a great strategy. However, cutting and pasting phrases directly from the guidelines will not result in funding. A good proposal will tell a story about how and why their project fits within the funder's criteria.

Sample Executive Summary:

Established as a charitable organization in 1901 by a collective of seniors aged 60 to 82, the Some Town Senior Center is a community hub of activities and support services that specifically cater to the needs of seniors. The Center focuses on the health, social, recreational and living needs of the elderly population in the area. We are the only senior centre that serves the area and over 135 older adults each day through a variety of programs. Our mission is to help seniors improve and maintain a healthy and independent lifestyle and to maximize their quality of life. ***[WHO THEY ARE, DEMOGRAPHIC, MISSION]***

We are sensitive to the changing demographic in our centre's service area and are committed to adapting our program to meet emerging needs. The Senior Immigrant Community Outreach Project will open our doors to Immigrant seniors who are seeking health and social services. ***[NEED]*** Program objectives include ensuring that we increase Immigrant seniors by 50% for first time visits, engage a minimum of 35 immigrant seniors in our new healthy multi-cultural cooking class, and increase our referrals from the community clinic and senior focused community organizations. After the first phase of the program has been completed, we are committed to phasing in access to our center's other programs. ***[PROPOSED INITIATIVE, ACTIVITIES AND OBJECTIVES]***

The Center plays a vital role in the lives of seniors in Some Town and surrounding areas, as indicated by our 90% approval rating from our clients since 2009. Our services account for 85% of those accessed by seniors in the area, which has recently experienced a surge of immigrant seniors from both established and newly located families. Many of these seniors have limited access due to income, language barriers or lack of awareness of our services. ***[WHY THEY ARE IDEALLY SUITED TO RUN NEW PROGRAM]***

We believe that this project will introduce our center and services to an extremely underserved senior population. ***[NEED or PROBLEM]*** As a result, we anticipate a rise in a range of health issue, increased diversity among our clients, and improved quality of life for those clients. The total cost for initiating this program is $75,000. Of this amount, $55,000 has been committed from our town, provincial funders and other donors. Your investment of $20,000 will complete the funding that we require to for implementation of this project. **[*OUTCOMES AND REQUEST SUMMARY]***

TIPS FOR WRITING A GOOD PROJECT DESCRIPTION

1. Pinpoint the need or problem within the community or organization.
2. Use statistics that are clear and support your argument.
3. Use comparative statistics and research. Citing a community that did something similar to your proposal and its beneficial results makes a strong case for your proposed actions.
4. Quote authorities on topic, and include names and sources for verification.
5. Document all your data (i.e. books, studies, website links, etc.)
6. Use stories but anchor them in hard data. A well-supported need statement that also includes effective stories is a winner.
7. Provide a sense of urgency. Help the funder understand why the funding is important now.

E. Project Description

A good project description requires that you to commit yourself to clarifying the need or problem, along with a structured set of objectives, implementation plan, a logic model, and outcome measurements. Essentially, this is a detailed plan, comprised of the following elements:

1. **Need or Problem Statement**
   A description of the need or problem facing a certain group or geographic area.
2. **Goals and Objectives**
   Where your program or constituency aims to be once the project has come to its completion.
3. **Method and Outcome Measurements**
   Measurable benchmarks or specific steps that lead up to the accomplishment of your goals.

1. **The need or problem statement should:**
   - Clearly relate to your non-profit's mission and purpose.
   - Focus on the people you serve, rather than your organization's needs.
   - Be well supported with evidence such as statistical facts, expert views, and trends.
   - Be directly connected to, and substantiate, your ability to respond to that need.
   - Easily digestible. Use the KISS principle (keep it sweet and simple).

Avoid circular reasoning

The need statement should avoid circular reasoning, a common error in proposals. For example, "The problem is that we have no senior center in our community. Building a senior center will solve the problem." This is not the need, but an obstacle or gap to addressing the need. Why does this community need a senior centre? The answer to this question is the real need or problem that requires addressing, e.g. a lack of senior specific programming, reduced quality of life or an increased risk of health issues.

Worksheet 6: Problem and Needs Statement Activity and Tool

Sample Need Statements – Comparison and Analysis

Successful Need Statement:

A 1999 report from Regional Health showed that the Little Creek ranked among the worst in the province over a 3-year average for infant mortality, low birth weight and premature births, late entry into prenatal care, unmarried parents, teen pregnancies and poverty. A Prenatal Rural Focus Group report revealed that communication by families and doctors is generally poor. There is a need for information on childbirth education opportunities, support services, childbirth preparation, breastfeeding, sibling preparation for new baby, and postpartum depression. The focus group indicated that the town's library could help in directing new parents to resources and materials. To meet this need, the library proposes a program to expand services by linking with family health practitioners and the Memorial Hospital to reach expectant and post-partum mothers and their children.

Statement Analysis:

This is a good needs statement. The author first references the community problem through a report done by a provincial health organization and then mentions other findings from a local focus group. In the planning stages, the focus group provided data regarding the target population and their needs. It is important to note where you get the information – a documented problem has more weight than a general observation by one person. There is a clear definition of the problem and there is a clear role for the library. This project naturally suits the library's mission to provide information and resources to the community. There is mention of appropriate partners that work directly with the target population.

Problematic Needs Statement:

Little Creek is an economically depressed community with many people out of work. In the past, this community was a thriving town, but with many industries, moving out there is a large segment of the population who need help. Little Creek has a population of teen mothers living in poverty. The library can help this population by providing services. The library will expand their family services collection by 1,500 titles dealing with pregnancy needs. The library and its partners will also offer eight programs over the grant year that deal with pregnancy topics such as breastfeeding, prenatal care, post-partum depression and more. The addition of a grant-funded staff member to coordinate efforts with the local medical field will make the project a success.

Statement Analysis:

This needs statement could be greatly improved. The author did not cite or specify information or data on the teen pregnancy problem or an assessment process. The needs statement does not provide details about its target population or the significant impact of the project or services.

2. Goals and Objectives

The goals and objectives are the aims or markers for what the project hopes to accomplish. A goal is a broad statement: general, intangible, and abstract. You will effectively "hook" reviewers by using visionary words such as decrease, deliver, develop, establish, improve and produce.

TIPS FOR WRITING GOOD GOALS AND OBJECTIVES

- Tie your goals and objectives directly to your need statement.
- Include all relevant groups and individuals in your target population.
- Always allow plenty of time to accomplish the objectives.
- Do not confuse your outcome objectives for methods.
- Figure out how you will measure the change projected in each objective. If there is no way to measure an objective, it needs to be changed.
- Do not forget to budget for the evaluation (measurement) of your objectives.

Sample GOAL:

"*Increase the degree of literacy among young children in the district."*

A goal is only as good as the objectives that go with it. The objective represents a **specific** step toward accomplishing a goal. In contrast to the above goal, an objective is narrow, precise, tangible, concrete, and measurable. An example of an objective that would go with the sample goal above is:

Sample OBJECTIVE:

"By the end of year one, provide 200 young children in the district with a two-hour after-school program that will increase literacy through storytelling, tutoring and reading time."

<u>One of the best and easiest ways to write outcome objectives is to think "SMART."</u>

- **S:** Is the objective **SPECIFIC**, rather than abstract?
- **M**: Is the objective **MEASURABLE**? Are results tracked with valid measurement tools, such as surveys, pre- and post-needs assessments, and more?
- **A**: Is the objective **ATTAINABLE**? Can your organization really pull off the objective?
- **R**: Is the objective **REALISTIC**? Are the measurements actually attainable for the target population in the given period?
- **T:** Is the objective **TIME BOUND**? Can your organization accomplish all the required tasks to achieve the objective in the given period?

Worksheet 7: Tool for Developing a Goals and Objectives

3. Outcome Objectives and Measurement Methods

"In order to achieve the objectives for our literacy program, Some Town Youth Centre will employ the measurement methods outlined below. We have confidence in these methods, as they have been tested and proven successful by statistic from Literacy for Life and a similar non-profit organization, Little Creek Youth Centre in the province."

Objective One

Ensure that a minimum of 30 youth with literacy challenges complete our after-school storytelling and reading comprehension tutoring sessions for three consecutive months.

Outcome Measurement Methods

- *Some Town Youth Center will hire a program assistant, three storytellers and six tutors who specialize in reading comprehension and literacy education for youth.*
- *The storytellers and tutors will adapt the centre's current literacy curriculum including storybooks, materials and activities appropriate to youth who face literacy challenges.*
- *The program director and tutors will develop the protocols for testing and tracking program participants for three consecutive months after completing the after school program.*
- *Staff will track participants' progress on a weekly basis for three months following completion of the after school program. The program assistant will formally chart the progress of each participant. Use this list of questions to explore how the activities and methods support your goals and objectives:*

CHECK YOUR PROJECT DESCRIPTION BY ASKING THESE QUESTIONS

- Do methods derive logically from the need statement and your goals and objectives?
- Have you accurately presented the program activities you will be undertaking?
- Did you explain why you chose these activities or measurement methods?
- Is there a timeline that makes sense?
- Have you made it clear who will perform specific activities?
- Given the resources you do have, are the activities feasible and are they accurately measureable?

F. Budget

For many proposal writers, the budget is one of the most intimidating sections of the application. However, by learning some of the basic principles of budget development, you can reduce the stress and create a sound budget. Here are some key rules to follow when you are developing a budget:

- Be specific. State up-front what you would like the donor to fund, whether it is the whole project or just a part of it.
- Be realistic. If you have done your homework properly, you will have some idea of the usual size of grants from this donor for this kind of work.
- Do not itemise line details in the body of the proposal. Rather focus on totals per year, and per broader category e.g. capacity building rather than each training workshop.
- Provide a picture of your financing strategy for the project e.g. who else you are approaching, whether any money or support has already been offered and if so, how much and in what form. If your intention is to raise funds from the beneficiaries, explain the reasoning behind it, and the mechanisms in place to facilitate it.
- Address the cost-benefit issue, justifying the cost in terms of the benefits.

Worksheet 8: Tool for Developing a Proposed Budget

Budget Preparation for Grants

Always try to leave your budget until last. Your detailed plan will make it much easier for you to map out and list your expenses and revenues. The goal is to present your budget in a way that makes a good impression and links directly back to your need, objectives and activities. Most funding agencies will provide a budget form. If not, then set up a budget in an excel spreadsheet or in table form in word processing. It is important to organize your budget so it is easy to read and understand. The first step is to go through your proposal and make a list of potential expenses. A comparison of direct versus indirect expenses outlined next will help to delineate how a budget should be set up. We have also included a proposed budget worksheet/tool that will help put together a good budget.

Direct Costs:

- Staff and Staff Benefits related to some operations, programming or projects
- Volunteers (t-shirts, appreciation events or other related costs)
- Facilitator, artists, teachers or other professionals consultants
- Travel (accommodation, air fare, tax, gas or per diem)
- Equipment (audio, computer, photocopier, camera, printer, etc.)
- Materials and supplies (crafts, booklets, costumes, etc.)
- In-kind contributions (volunteers, facility, advertising, objects, transportation
- Marketing or promotions (brochures, tickets, posters, website)

Indirect Costs

- Facility (rent, insurance, maintenance, utilities)
- Banking, book keeping or accounting
- Office supplies or equipment.
- Administrative support staff, training or professional services

Note about in-kind donations

In-kind contributions are a legitimate budget item. REMEMBER, you must add in-kind contributions as both an expense and a revenue. For example, if you calculate volunteer time as $1000 in your revenues then you must also add volunteer time as an expense. Estimations of in-kind services or goods are "market value." For example, calculate a volunteer's time working in an unskilled position at minimum wage. You may include a formula as follows: 5 volunteers X $10 hourly X 5 hours per week X 36 weeks = $9000. In-kind contributions will impress reviewers because they are evidence of community support. For any in-kind goods or services, obtain an invoice showing the real cost to keep on file.

BUDGET PREPARATION TIPS

1. The budget and proposal should be mutually reinforcing. Budgets reflect the depth of project planning. A poorly articulated budget may be evidence of an ill designed project.

2. Budgets should be reasonable. Funders have experience reviewing budgets. They know when a budget is inadequate for the tasks proposed, filled with errors or padded.

3. Create a budget by analyzing the tasks and resources needed to complete each activity.

4. Avoid lump sum requests. A budget with a flat $1,000 for "travel" will pale beside a request that breaks down the total amount into airfare, ground transport, lodging and meals.

5. Allow for inflation. Salaries, fringe benefits (health insurance), utilities, rental and transportation costs often increase each year.

6. Follow the funding eligibility guidelines. Call agency if you have specific questions.

7. Matching funds are your organization's contribution to a proposed project. A funding agency may state that they will provide up to 50% of the eligible costs. Pay attention to their average contributions, and ensure that your budget reflects other contributions.

SAMPLE PROJECT BUDGET:

	A	B	C	D
1	**LITTLE CREEK JAZZ – EMERGING SERIES – Budget 2012 – 2013**			
2				
3	**Project Budget**	**Total Project**		
4		**Budget**		
5				
6	**Income**			
7	Sponsorship – St. John's Music	$500	Confirmed	
8	**Concert Tickets:***			
9	Friday Night Jam 500 tickets @ $5 per	$2,500		
10	Emerging Series 1000 tickets @ $15 (avg)	$15,000		
11	SJS Big Band/High School 500 @ $5	$2,500		
12	**Other funding sources:**			
13	RBC Emerging Artist Program	$5,000		
14	Saskatchewan Arts Board	$2,000	Confirmed	
15	**Total Income**	**$27,500**		
16				
17	**Expenditures**			
18				
19	Sound Technician/Equipment (24 Shows @ $300 each)	$7,200		
20	Artistic Director Fee	$1,500		
21	Mentors for Jazz Sessions (10 Trio Live Jams)	$3,500		
22	Emerging Artist Fees (10 concerts)	$7,500		
23	Facilities Cost (Portion):	$3,000		
24	Project Staff (Manager and Club Staff)	$3,000		
25	Promotional Materials (brochure, poster, phone app)	$1,800		
26	**Total Project Expenditures:**	**$27,500**		
27				
28	***Ticket sales based on 2011-2012 Season**			
29				
30				

Sheet1

READY 100%

PROJECT BUDGET IN TABLE FORMAT: [Incorrect Version]

<u>EXERCISE:</u> Compare this budget with the one on the following page and find the errors.

Description	Projected Budget	ABC Funding Agency	Little Creek Centre
EXPENSES:		**50%**	
Program Coordinator $1200 a mo. X 6	7200	5000	2200
Artist Workshop Fee 24, 3 hour sessions @ $150 per session	3600	2000	1600
Facility Rental – In Kind (24 x $100)	2400		2400
Art Materials and Supplies Fabric, paints, brushes and mixed media for arts and craft projects @ $50 per session	1200	600	600
Participants travel Bus to community centre 30 kids x $5 x 6	900	450	450
Administrative Support 6 months x $600 per month	3600	`1650	1950
Office related costs: Supplies, photocopying, computer usage	1300	400	900
TOTAL EXPENSES	**20200**	**10100**	**10100**
REVENUES			
Saskatchewan Arts Board Project Grant	**4000**		**4000**
ABC Funding Agency	**10100**	**10100**	
Some Foundation	**2500**		**2500**
Fundraising Event	**2500**		**2500**
TOTAL REVENUES	**20200**	**10100**	**10100**
BALANCE	**0**		

ELIGIBLE COSTS: ABC Funding Agency rewards up to 50% of the direct costs related to projects with a focus on community arts for youth. Non-eligible costs include indirect costs such as administration or facility expenses.

PROJECT BUDGET IN TABLE FORMAT [Correct Version]:

Description	Projected Budget	ABC Funding Agency	Little Creek Centre
EXPENSES:		**50%**	
Program Coordinator $1200 a mo. X 6	7200	5000	2200
Artist Workshop Fee 24, 3 hour sessions @ $150 per session	3600	3600	
Facility Rental – In Kind (24 x $100)	2400		2400
Art Materials and Supplies Fabric, paints, brushes and mixed media for arts and craft projects @ $50 per session	1200	950	250
Participants travel Bus to community centre 30 kids x $5 x 6	900	550	350
Administrative Support 6 months x $600 per month	3600	`	3600
Office related costs: Supplies, photocopying, computer usage	1300		1300
TOTAL EXPENSES	**20200**	**10100**	**10100**
REVENUES			
Saskatchewan Arts Board Project Grant	**5000**		**5000**
ABC Funding Agency	**10100**	**10100**	
Some Foundation	**2500**		**2500**
Fundraising Event	**2500**		**2500**
TOTAL REVENUES	**20200**	**10100**	**10100**
BALANCE	**0**		

PLEASE NOTE: Compare the light shaded boxes to figure out the errors in the first budget.

G. Support Material and Appendices

Support material is what you add to your application that demonstrates your work as an organization, and the feasibility or support surrounding your project. When requested, these attachments should follow the order as outlined in the request.

Read the guidelines carefully and provide an attachment list for the reader's reference. For example, Attachment 1 – Board Bios, Attachment 2 – Letters of Support, and so on. Make sure you label each attachment with the proper code or number.

Do not underestimate the importance of this section! Remember, support material is a valuable persuasion tool that communicates important messages about your organization and the impact of your work to the reviewers, such as:

- Telling a story about your strengths, public recognition and best achievements.
- Bringing the human element of your work to life through images, events or partnerships.
- Supporting the feasibility or impact of your project through charts, data or essential research.
- Highlighting your fiscal management, internal policies and capacity.
- Bringing attention to community support through volunteer, membership, partnership or client feedback.

Depending on the funder you are applying to, support material may include the following items:

- Letters of support, testimonials or quotes from partners, donors, clients or volunteers.
- Plans or architectural drawings for a renovation or building project.
- Promotional material (media clippings, visual material, brochures, posters)
- Charts, data or research supporting your problem or impact statements.
- Certificate of non-profit incorporation or charitable status.
- Annual Report and most current Audited Financial Statements
- Strategic, Business or Marketing Plans

Letters of Support

If letters of support are required, keep in mind that it may take more than four weeks to obtain such a letter from an organization, business, volunteer, client or associate. Ask early, ask nicely and ensure that people have the right information to supply what you require in time for submitting your application. It can also be helpful to provide an example or template for someone to build his or her own letter. Remember to collect letters of support year round from people or organizations who have benefitted from or support your work.

Annual Report

An annual report can help demonstrate your accomplishments, cultivate new partnerships and recognize important people including participants and supporters. Within an application, it can highlight a range of things including fiscal management, funding support, success stories and other general information about your board, operations or annual programs or activities. Although not a requirement, it can be an invaluable communication tool that an organization should consider establishing.

Audited Financial Statement

Audited statements are becoming the standard for best practice among non-profit and charitable organizations seeking to provide reassurance of their financial integrity. Governments, donors, suppliers, board members and other volunteers often look to this annual examination of an organization's financial records as evidence of financial transparency, accountability and stability.

Promotions, Advertising and Marketing Materials

Apart from the powerful images or messages about your organization, promotional materials give you an advantage—particularly with potential corporate donors. A strong public profile is often a key component of a corporation's decision-making process for funding support. Providing an overview of your promotional materials will provide insight into the public profile a funder may gain through your brochures, events, posters, programs, invitations, banners and advertising.

A FEW NOTES AND TIPS

- Check the Program Guidelines to see what materials you can send in.
- Do not send in the only copy of materials that you have. Always keep extra copies of letters of support, posters, brochures or articles in a file for application purposes.
- Submit the required number of support materials, and no more.
- Ensure that you have marked the attachments properly and placed them in the correct order.
- Always check the guidelines for rules about the number of copies required for each attachment (i.e. brochures), or if they prefer to have that material in digital copy.

CHAPTER 8 FOLLOW UP – REPORTS AND ACTIVITIES

There are two types of follow-up related to the submission of funding proposals. Firstly, there is the kind of feedback related to receiving a letter of rejection. The other kind relates to the expectations you will have to meet once you have received a successful response to your application.

One letter is obviously more agreeable than the other one, but both can help you to build strong and supportive ties with funders or potential funders.

The letter of acceptance offers support through a funding gift while the other can offer invaluable gifts of learning through direct feedback. Most of us would agree that a letter of rejection is both a painful and frustrating experience. However, you might want to keep the following in mind:

- It was your proposal that received a rejection – not you.
- Remember that even the best grant writers receive rejection letters. No grant writer will receive 100% of his or her grants.
- A rejection letter is an excellent opportunity to connect with a funder and learn about how you could improve your application.

Rejection letter

Connecting with a funder is the best way to learn why your proposal received a rejection. Most officers, whether they are from an agency, foundation or corporation, will welcome the opportunity to discuss your proposal. There are usually many good reasons for getting a "no," and the feedback you receive will help you improve on your chances for the next time. Alternatively, it may help you to decide that the funder was not a good match for your project**. Some possible reasons for a rejection might be:**

- Your proposal did not meet the funder's criteria and priorities.
- The proposal had weak areas such as errors in the budget or not enough clarity about the need, objectives or outcomes of the project.
- The proposal did not impress the representatives who reviewed the application.
- The funder did not have sufficient funds available at the time to support the proposal.

Consider the following example:

An arts organization in Saskatoon had applied for an Arts Presentation grant through Canadian Heritage 3-years in a row. Each time they were unsuccessful. The letter was general (as they often are), stating that the agency supported the program, but that other organizations better met their criteria. The

organization was confused about these decisions as they had previously received funding under a different program, and by most counts, did fit the agency's criteria. However, when they finally took the time to meet with the officers, what they discovered was very simple. Despite the strength of their application and programs, the agency was rewarding new funding to arts presentation programs within rural or isolated communities, not in urban centres.

The more you know about the reasons for a refusal, the less likely you are to make the same mistake again, or waste valuable resources. Funding programs are competitive, and receiving a rejection on your first try is common. However, the information you gain will help you to decide whether it is worthwhile sending in another request—and if so, what you can do to take the application to that winning level. Unless the rejection was due to a complete mismatch, you should keep them in your stewardship file for future reference. **Whatever you decide, it is important to remember that your fact-finding mission helped you to achieve two things:**

1. You have learned how and if you can improve your proposal and correct any mistakes.
2. You have made contact with a funder in a professional manner, which has opened the door to developing a positive relationship with the funder in the future.

Successful application

You have just heard that your proposal was successful. It was clearly a job well done. Congratulations! After some well-earned celebration, you will need to sign a contribution agreement or agree to the conditions set out by the funding agency. Each funder will have different expectations on how to account for all financial dealings, report on activities, and acknowledge the funder in your promotional materials. You may also have other arrangements such as presentations, signage or promised tickets. No matter the agreement, it is crucial that you fulfill your obligations in a professional and timely manner.

Final reports

Final reports are usually the last component in the grant writing process. Most funding agencies will provide a list of reporting requirements such as a written report, a final budget, and copies of related promotional material. It is crucial that you complete and submit this report for approval. Failing to do so will result in not receiving future funding, or worse, having to return the funds. An award means that you must focus on building and retaining a strong relationship with that funder. This will ensure that you continue to receive annual funding, or keep that door open for a future successful proposal.

Here is some key reminders on accountability and relationship building with your funder:

- Thank the funder for their favourable response. By approving your proposal, the funder has shown that your work is valued. It is important to respond in ways that show them that you value their commitment and support. Thank them both personally and publicly!

- Keep the funder up-to-date on what is going on in the project and/or the organization by sending regular or final reports, annual reports or other material that may be of interest to them. If you have done your homework properly, you might also personalise the process by including a card with a note.

- Invite your funder to your events – even if you think they may not be able to come.

- Always meet the reporting requirements of the funder. This means providing the right material (narrative and financial), in the right format, at the right time. Make a note in your calendar for a month before the reports are due so that you are prepared.

- Put mechanisms in place for collecting the information that will be required. You may need to code relevant receipts, photograph events or projects, monitor and evaluate outcomes, or request letters of support from clients or other key stakeholders.

- Keep communication open at all times, and be available for meetings or requested tours or visits of your organization or events. Be prepared to provide explanations or details about your activities and achievements.

- Make sure that you know what the funder is hoping to get from the relationship, and then provide it. If you do your homework well, you will know what the donor will please the donor.

- Celebrate your funding successes. Be enthusiastic about your funder commitments, and do not forget to thank them for their generosity and support. Remember, by servicing your funders, you are also creating the potential for a long-term relationship, and commitment to your community.

Some final words of encouragement

When you are in the midst of writing a grant and feeling like you will never make your way through it, just remember, you can do it. The deadline will come and go, so just keep focused on your task and ignore all the other distractions. Keep working on those proposal writing skills – and remember; practice makes perfect. Your proposals WILL get better and the writing process WILL get easier. Just keep at it, and do not take a rejection personally. You will get your share of wins too, but also some uphill battles on raising the funds you need for your projects.

We know that non-profits are competing for fewer grant dollars and that government grants are shrinking. It will not always be easy to reach your fundraising goals, but we hope this manual gives you the tools and confidence that you need to write those award-winning proposals and keep building on the capacity of your organization. Be smart; stay on track and good luck!

CHAPTER 9 WORKSHEETS

Worksheet 1: Proposal Production Schedule Template

Worksheet 2: Project Plan and Funding Prospect Assessment Tool

Worksheet 3: Asset Inventory Tool

Worksheet 4: Project Planning Tool

Worksheet 5: Strategic Planning Tool for Developing a Blue Print

Worksheet 6: Problem and Needs Statement Activity and Tool

Worksheet 7: Tool for Developing a Goals and Objectives

Worksheet 8: Tool for Developing a Proposed Budget

Recommended Reading and Bibliography:

Books

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Browning, Dr. Beverly A. Grant Writing for Dummies, Hoboken, NJ: Wiley Publishing Inc., 2009.

Clarke, Cheryl A. Storytelling for Grantseekers: A Guide to Creative Nonprofit Fundraising, San Francisco, CA: Jossey-Bass – A Wiley Imprint, 2009.

Funding Advice

Blog @ Imagine Canada: Building Your Prospect List: What Makes a "Good" Funder?
http://blog.imaginecanada.ca/2011/10/27/building-your-prospect-list-what-makes-a-good-funder/

Blog @ Imagine Canada: The Silver Bullet

http://blog.imaginecanada.ca/2011/09/29/the-silver-bullet/

Canada Business: Search tool listing over 400 government funding programs.
http://www.canadabusiness.ca/eng/search/sof/

Proposal Writing

Blog @ Imagine Canada: Making the Pitch: Writing an Effective Statement of Need

http://blog.imaginecanada.ca/2012/04/12/making-the-pitch-writing-an-effective-statement-of-need/

Cass CCE: The Art of Refusal

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Foundation Center: Proposal Writing Short Course
http://foundationcenter.org/getstarted/tutorials/shortcourse/index.html

Grant Makers Reveal the Most Common Reasons Grant Proposals Get Rejected

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Civicus: Writing a Funding Proposal Toolkit

https://www.civicus.org/new/media/Writing%20a%20funding%20proposal.pdf

GrantSpace: Free collection of winning proposals, cover letters, letters of inquiry, budgets, and more.

http://grantspace.org/Tools/Sample-Documents

The Writing Centre - Grant Proposals (or Give me the money!)

http://writingcenter.unc.edu/handouts/grant-proposals-or-give-me-the-money/

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