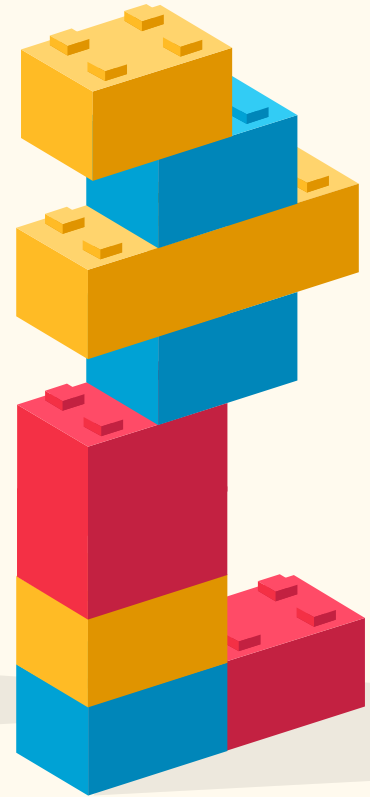
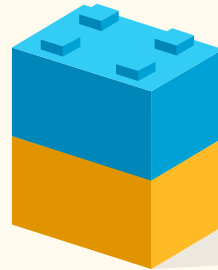
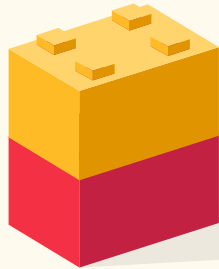
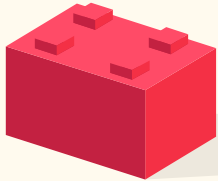
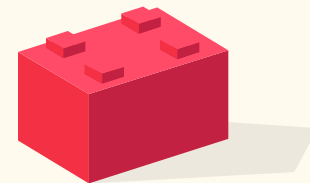


# BUILDING BLOCKS FOR SUCCESS IN GRANT WRITING

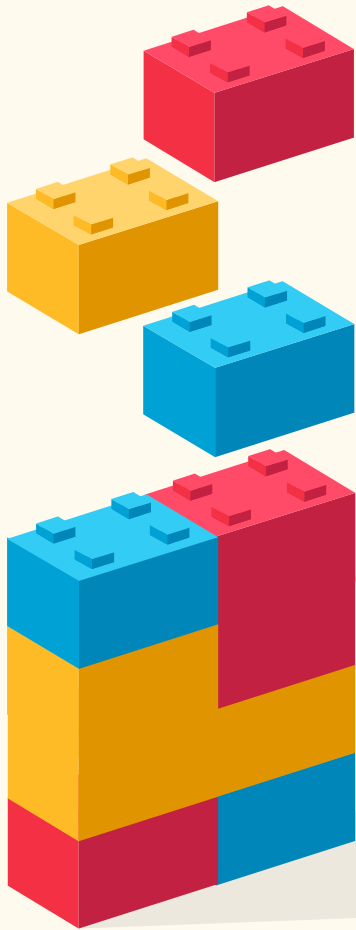
Presented by: Erica V. Ekwurzel & Amy Loar  
2023 TEFN Annual Conference



# WORKSHOP AGENDA



|   |   |
|---|---|
| <b>INTRO TO YOUR BUILDING GUIDES</b>    | Learn more about the direct experience, perspectives & fun facts of your trainers |
| <b>STAND TALL GROUP SURVEYING</b>       | Interactive 'Stand Up, Sit Down' activity to draw out wisdom of the participants  |
| <b>OVERVIEW OF GRANT WRITING</b>        | (Amy)   |
| <b>TYPES OF FUNDERS &amp; GRANTS</b>    | (Amy)   |
| <b>HANDS-ON 'BUILD-A-PROPOSAL'</b>      | (Amy)   |
| <b>'BLUEPRINT' JOURNALING</b>           | Reflecting on what you've learned thus far, and what you hope to cover ahead      |
| <b>TIPS FROM A PROGRAM OFFICER LENS</b> | Learn practical tips from the person reviewing your grant proposal                |
| <b>LEVEL-UP IN STEWARDSHIP</b>          | Best practices in developing, maintaining and deepening donor relationships       |
| <b>BUILDING YOUR ARCHITECT TEAM</b>     | (Amy: includes FDO & add'l resources)   |



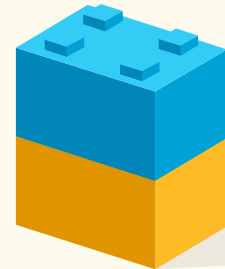
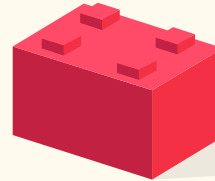
**“FUNDRAISING IS MOTIVATING AND  
ASKING OTHERS TO SHARE WITH YOU  
IN A GREAT ADVENTURE,...**

**VISION,...**

**A DREAM.”**

**A**

Source: Jerold Panas, Renowned Author, Coach, Consultant to Major  
Gifts Fundraising



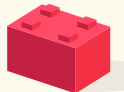
# YOUR BUILDING GUIDES



Experience in grants

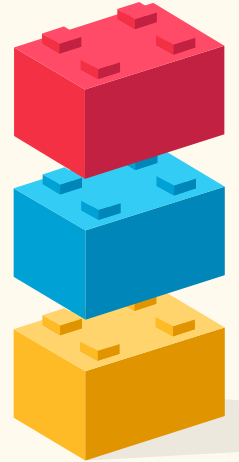
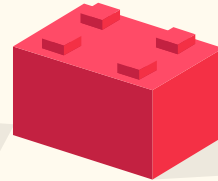
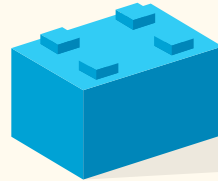
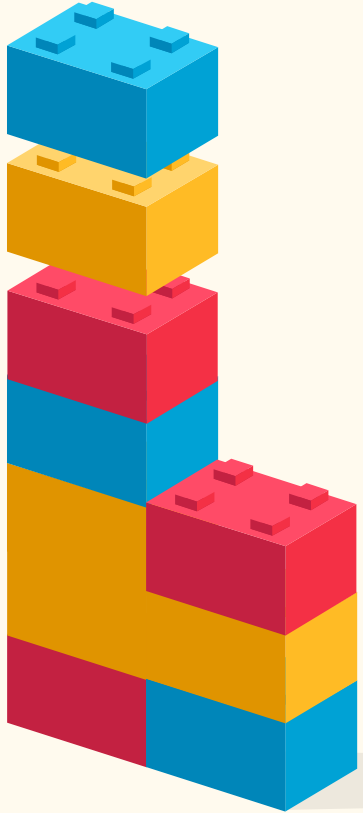


“Wish I would have known then, what I know now...”



“My proudest grant writing story...”

# STAND TALL GROUP SURVEYING

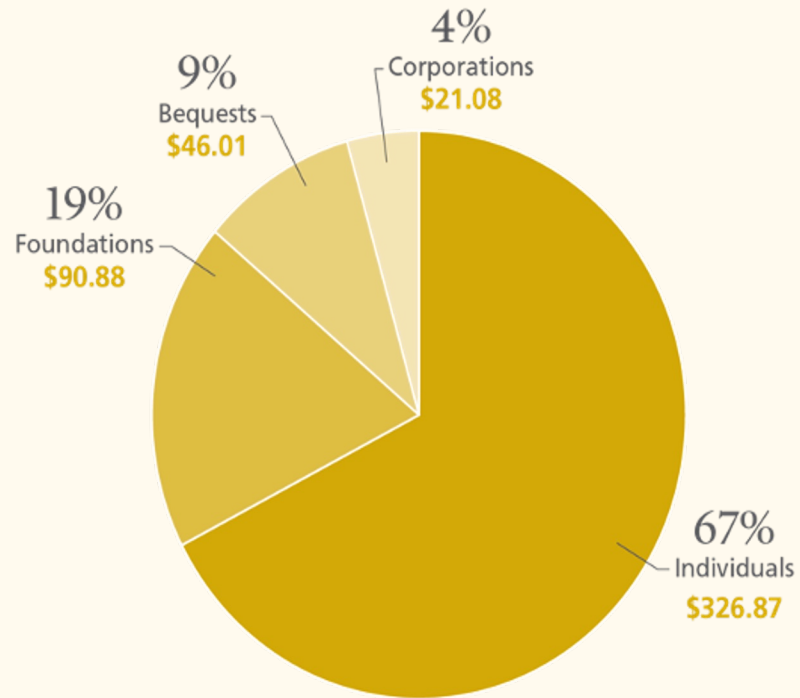


# **BUILDING YOUR GRANT PROPOSAL**



# 2021 contributions: \$484.85 billion by source of contributions

(in billions for dollars – all figures are rounded)



# PROPOSAL WRITING PROCESS STEPS

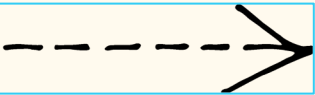


What do you need the money for?

Who will you approach?

How to put it all together?

What to do once the decision has been made?

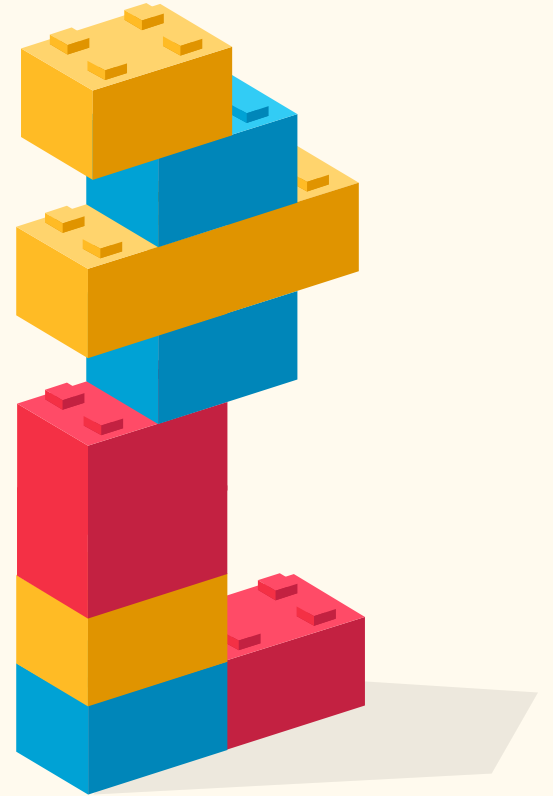


**Tip:** Always follow the funders' guidelines



# TYPICAL PROPOSAL ELEMENTS

- Executive Summary
- Narrative
- Statement of Need
- Project Description
- Organization Information
- Conclusion
- Budget
- Supporting Materials



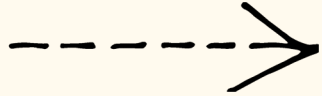
# **WHAT FUNDERS REALLY WANT TO KNOW**

# WHAT SPECIFIC NEED ARE YOU ADDRESSING?

-----> Tip: Make sure it fits the size and scale of your solution

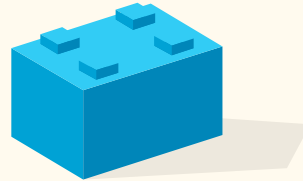


# WHAT ARE YOU TRYING TO ACHIEVE?



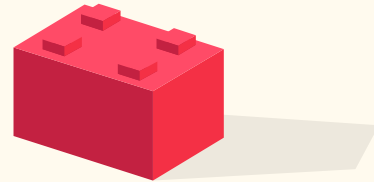
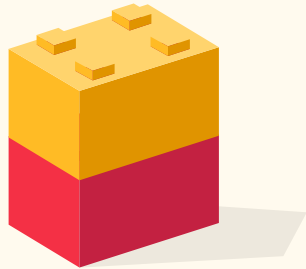
**MEASURABLE**

**TIP: YOUR OUTCOMES MUST BE**



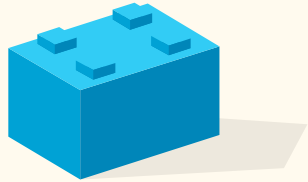
# WHAT ARE YOUR STRATEGIES FOR MAKING IT HAPPEN?

-----> **Tip:** Think of your proposal as an organizing plan

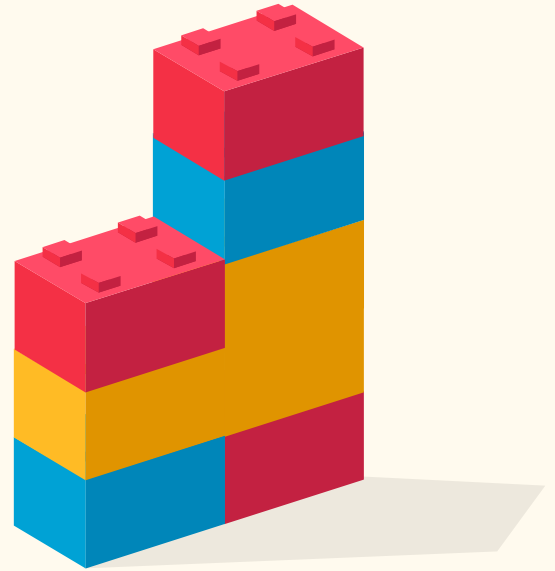


# HOW DO YOU KNOW IF YOU'RE SUCCESSFUL?

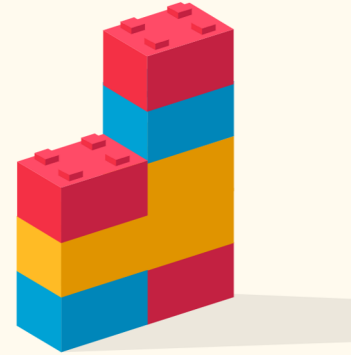
- Specify program objectives in measurable terms
- Identify key indicators of success
- Outline data collection and analysis activities
- Develop a timeline to monitor the success of the program



**WHY ARE YOU THE BEST  
ORGANIZATION  
TO DO THIS WORK?**



# HOW WILL THE PROJECT SUSTAIN ITSELF IN THE LONG RUN?

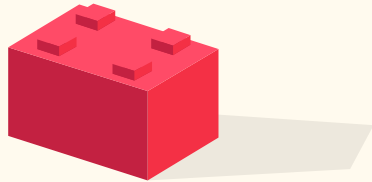




# TYPES OF FUNDERS & GRANTS



**NOT ALL FOUNDATIONS ARE ALIKE**



# TYPES OF FUNDERS & GRANTS

**01**

## **INDEPENDENT**

Private, often funded by individuals or a family.

**02**

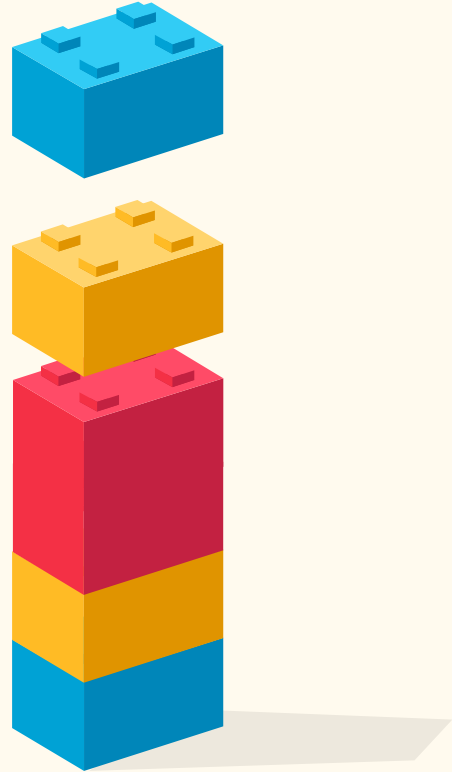
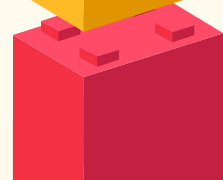
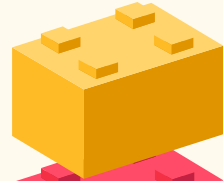
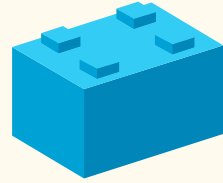
## **OPERATING**

may award some grants but the total is generally small relative to the funds used for the foundation's own programs

**03**

## **COMPANY-SPONSORED**

private foundations whose grant funds are derived from the contributions of a for profit business



# TYPES OF FUNDERS & GRANTS

**04**

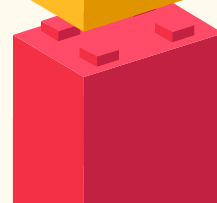
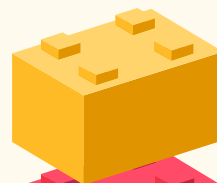
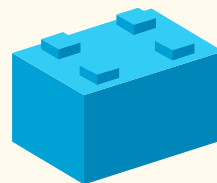
## **DIRECT CORPORATE GIVING PROGRAMS**

grantmaking programs established and administered within a profit-making company

**05**

## **GRANTMAKING PUBLIC CHARITIES**

receive funds from a variety of sources instead of a single source like private foundations.



# FUNDER MOTIVATIONS

- **PRIVATE FOUNDATIONS**

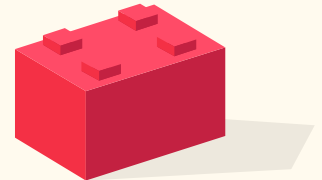
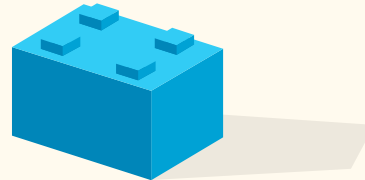
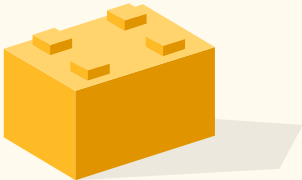
**PRIMARILY WANT TO FULFILL PHILANTHROPIC GOALS AND INTERESTS WHILE SUPPORTING A VARIETY OF ISSUES THROUGH AN OBJECTIVE PROCESS**

- **CORPORATIONS**

**TEND TO FOCUS MORE ON BRANDING, VISIBILITY AND CORPORATE SOCIAL RESPONSIBILITY (CSR)**

- **GRANTMAKING PUBLIC CHARITIES**

**TYPICALLY WANT TO MAKE AN IMPACT IN DESIGNATED COMMUNITIES OR REGIONS, OR FOCUS ON SPECIFIC POPULATION GROUPS OR ISSUE AREAS**



# **HANDS-ON** **BUILD-A-PROPOSAL**





# EXERCISE

## CREATE A PROJECT OUTLINE

**Candid.**

### Proposal project outline worksheet

Organization name:

Project name:

Project time period:

**Need**

(Explaining why your project is necessary)

**Project Description**

The Project Description includes information from Goals, Objectives, Methods, Staffing, Partnerships, Evaluation, and Sustainability.

**Goals**

**Objectives**



**15-MINUTE STRETCH BREAK  
RESUME AT 2:45 PM**

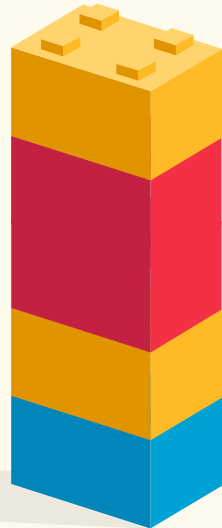
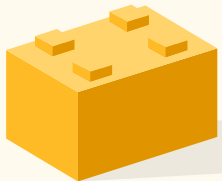


# TIPS FROM A PROGRAM OFFICER LENS



# HOW FOUNDATIONS OPERATE - *GENERAL* TREND

|                    | <b>Small Foundations<br/>(90%; under \$10M)</b>                            | <b>Large Foundations<br/>(10%; over \$10M)</b> |
|--------------------|--|--|
| Staff              | Few to no staff  | Multi-level staffing                           |
| Public Profile     | Keep a low profile   | Public-facing, report & share grantmaking data |
| Geographic scope   | Tend to focus locally  | More expansive;<br>local/regional/national     |
| Typical grant size | 4-5 figure, one-year   | 5-6 figure, multi-year                         |
| Reporting          | Storytelling with data   | Qualitative & quantitative                     |
| Metrics            | Informal reporting   | Formal evaluations                             |
| Cultivation        | <b><i>Conduct funder research &amp; approach through relationships</i></b> |  |



# **PRACTICAL TIPS:**

## **IMPORTANCE OF ARTICULATING YOUR CASE**

- ❖ **Vague articulation of intended impact**
  - Utilize common language - ditch technical terms
  - Lack of compelling reason to act/give
  
- ❖ **Weak evidence of program impact**
  - Evaluation data is weak or non-existent
  - No innovation
  - Duplication of other program efforts

# **PRACTICAL TIPS:**

## **DO YOUR NUMBERS MATCH?**

- ❖ Program needs align with Budget
- ❖ Program metrics match with expected Outputs
- ❖ Cite any and all assumptions/projections
- ❖ Proofread, proofread, proofread!!!

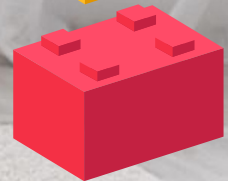
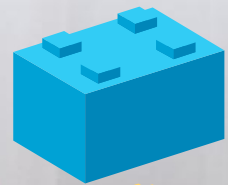
# **PRACTICAL TIPS:**

## **RELATIONSHIPS & RAPPORT**

- ❖ Visible and dedicated governance
- ❖ Visible and capable leadership & staff team
- ❖ Relations with other funders (current & prospective)



# LEVEL-UP IN STEWARDSHIP



# IMPORTANCE OF THE FOLLOW-UP

The grant request is the beginning of the relationship!

- Stay attune to status of grant
- Send a thank you note, regardless of funding decision
- Most importantly, *follow-up & follow-through* as these actions reiterate your organization is accountable, responsible and attentive!

# **DON'T LET REJECTION DISCOURAGE YOU**

- Rejection is part of the process of finding funding
- Reasons for rejection may have nothing to do with the quality of your program or proposal
  - Funding is limited, timing is essential
  - Funding priorities may have changed
  - Reached annual quota
- Contact the funders again next year. Strengthen communication lines and elevate program awareness



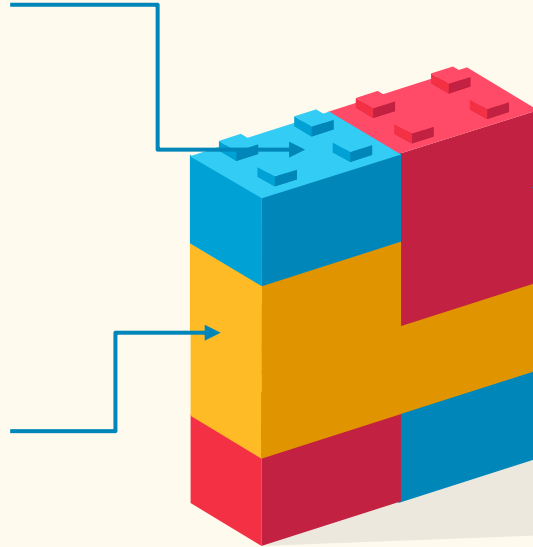
# BLUEPRINT JOURNALING



# BLUEPRINT JOURNALING

## UPPER RIGHT

Something that stood out for me from the first session...



## UPPER LEFT

Right now I feel...

## LOWER RIGHT

One question I still have...

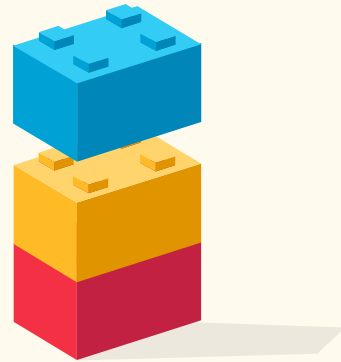
## LOWER LEFT

My hope for the rest of the Workshop...

**PREPARE, PREPARE,  
PREPARE**



# LET'S TAKE A LOOK AT THE FOUNDATION DIRECTORY ONLINE





# HOW TO ACCESS THE CANDID DATABASE

Locations in Texas:

Tom Green County Library

Burleson Public Library

Community Foundation of West Texas

Texas Grants Resource Center

Dallas Public Library

City of Plano Neighborhood Services Department

Austin College - Abell Library

Pleasanton Public Library and Information Center

Amarillo Area Foundation

Longview Public Library

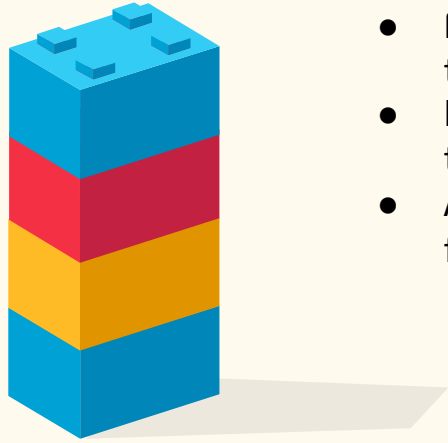
Houston Public Library

Texas A&M University - Texarkana

R. C. Miller Memorial Library - Beaumont Public Library System

Center for Civic Engagement - UTEP

# EQUITY TRENDS IN GRANTMAKING



- Equity work is a learning process
- Foundations who are looking to improve their equity try to be transparent about their process
- Reductions in requirements and paperwork are common trends
- Attempts to streamline grant awards and seek feedback from nonprofits are becoming more common

Links for more information:

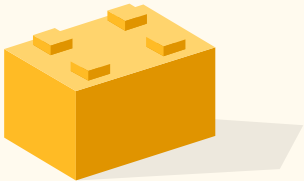
[Equitable Grantmaking Continuum](#)

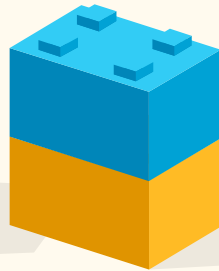
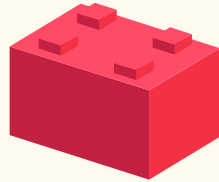
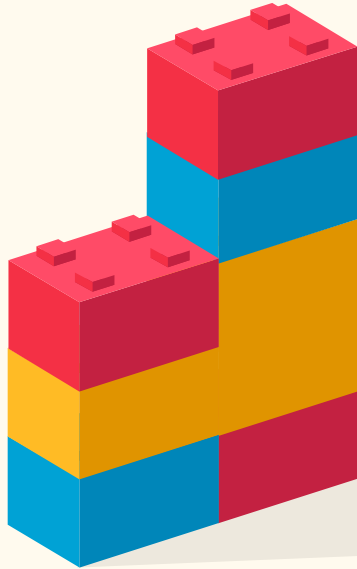
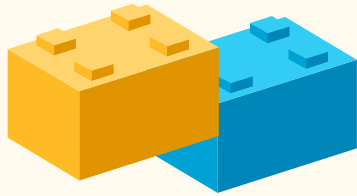
[Grantmakers for Education](#)

[Making Philanthropy More Equitable](#)

# GRANT WRITING RESOURCES

- The Grantmanship Center
  - [www.tgci.com](http://www.tgci.com) - hub to build skill & knowledge on grant writing
- Candid Learning
  - <https://learning.candid.org/> - training and downloadable templates and budgets for grant writing
- Grant Professionals Association
  - [www.grantprofessionals.org](http://www.grantprofessionals.org) - professional affinity group fo grant writers across the nation





# THANKS!

Does anyone have any questions?

[erica@civicaim.com](mailto:erica@civicaim.com)  
[civicaim.com](http://civicaim.com)

[amy.loar@austin.utexas.edu](mailto:amy.loar@austin.utexas.edu)  
[texasgrc.org](http://texasgrc.org)



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