GOVERNOR’S GRANTS OFFICE
BASIC GRANTS TRAINING 2017

Jennifer B. Jones
MARYLAND GGO: BASIC GRANTS TRAINING

Part I – Business of Non-profits

Part II – Prospect Research

Part III – Grant Writing Basics
PART I – BUSINESS OF NON-PROFITS

ESSENTIAL ELEMENTS OF STRATEGIES TO WIN
Your non-profit business is a business!
Vision & Mission
What am I going to do?
Envision - Name, Colors, Logo

Purpose
How do I do it?
What do I need?
Who will help me?
Who to serve?

Strategy, Planning & Capacity Building

Structure, Infrastructure Programs, Development & Impact Assessment

Business 101 - Infrastructure
SUSTAINABILITY: SURVIVAL VS. LEGACY

Non-profit Organization

Sustainability Plan

Grant Funding
Sponsorships, Annual Giving Campaign
Fundraisers Events & Campaigns
Membership & Partnerships

Endowments
Social Entrepreneurship
Strategic Restructuring
Board Reengineering
ROADMAP TO FUNDING SUCCESS

START

1. Determine Funding Needs
2. Strategic Program & PR Implementation
3. Identify Funding Sources - Sponsors
4. Build Relationships and Collaborate
5. Media Highlighted Launch & Gala Reception - Ball
6. Establish Sponsors, Partners & Celebrity Face
7. Pursue Grant Funding, Donations, Campaign

RE-EVALUATE SERVICES
SUSTAINABILITY: SURVIVAL VS. LEGACY

Non-profit Organization

Sustainability Plan

Grant Funding

Sponsorships, Annual Giving Campaign

Fundraisers Events & Campaigns

Membership & Partnerships

TODAY YOU ARE HERE

BASIC GRANTS TRAINING 2017 - JENNIFER JONES
GRANT WRITING BASIC – 3 SIMPLE STEPS

- Identify
- Prepare
- Submit

Three Simple Steps. No Simple Feat!
GRANT FUNDING SOURCES

- Government (Federal, State, Local Government)
- Private Foundations, Associations, Organizations
- Corporations
SUSTAINABILITY: SURVIVAL VS. LEGACY

Non-profit Organization

Sustainability Plan

Grant Funding
Sponsorships, Annual Giving Campaign
Fundraisers Events & Campaigns

STRATEGIC BUSINESS PLAN

Partnerships
Marketing & Communications Plan
Sustainability Plan
Fiscal Administration & Management
Research, Measurements & Data

BASIC GRANTS TRAINING 2017 - JENNIFER JONES
ROADMAP TO FUNDING SUCCESS

START

Determine Funding Needs

Strategic Program & PR Implementation

Identify Funding Sources-Sponsors

Build Relationships and Collaborate

Establish Sponsors, Partners & Celebrity Face

Research, Measurements & Data

Sustainability Plan

Partnerships

Media Highlighted Launch & Gala Reception-Ball

Marketing Plan & Social Media Strategy

Pursue Grant Funding, Donations, Campaign

Fiscal Administration & Management

RE-EVALUATE SERVICES

BASIC GRANTS TRAINING 2017 - JENNIFER JONES
PART II – PROSPECT RESEARCH
IDENTIFYING THE RIGHT OPPORTUNITY
PROPOSAL DEVELOPMENT STAGES

- Funding Strategy (Goals, Partners, Focus)
- Fundability Assessment
- Prospect Research
- Content Development
- Grant Identification
- Proposal Preparation & Submission
- Award Notification & Debriefing
- Grant Management & Fiscal Administration
- Grant Closeout
PROPOSAL DEVELOPMENT STAGES

- Funding Strategy (Goals, Partners, Focus)
- Fundability Assessment 🔄
- Prospect Research
- Content Development
- Grant Identification
- Proposal Preparation & Submission
- Award Notification & Debriefing
- Grant Management & Fiscal Administration
- Grant Closeout

What do you need? vs. What you want?
Definition: a process in fundraising wherein a researcher identifies and provides relevant information about potential donors to an organization (http://www.aprahome.org)

Resources:
- Governor’s Grants Office (http://grants.maryland.gov)
- Foundation Library (http://foundationcenter.org)
- Grantsmart (http://grantsmart.org)
- Grantspace (http://grantspace.org)
- Guidestar (www.guidestar.org)
- WAGM (www.washingtongrantmakers.org)
- Grant Watch (www.grantwatch.com)
Your non-profit business is a business!
PART III – GRANT WRITING BASICS

SUBMITTING A WINNING GRANT APPLICATION
THE GRANT APPLICATION

WEALTH OF INFORMATION!

- Overview Of Funding Entity
- Background Or Purpose Of The Opportunity
- Application Instructions
- Guidelines And Policies (Eligibility, Award, Funding Restriction, Data Sharing, Etc.)
- Evaluation Criteria
- Submission Criteria
- Point Of Contact
GRANT APPLICATIONS

FOUNDATION CENTER
(http://foundationcenter.org/findfunders/cga.html)

COMMON GRANT APPLICATION
(http://www.commongrantapplication.com/)

GRANTS.GOV (http://www.grants.gov)

USA.GOV (http://www.usa.gov)

NEW USA FUNDING (http://www.newusafulfunding.org)
RULES FOR SUCCESSFUL GRANT WRITING
BEFORE WRITING THE GRANT!

- **Read** The Grant Application, Instructions, Attachments
- **Establish A Timeline** For Preparing The Application
- **Establish A Comprehensive List of Deliverables**
- **Assign Deliverables & Tasks To Team With Deadlines For Completing Each Deliverable**
RULES FOR SUCCESSFUL GRANT WRITING
BEFORE WRITING THE GRANT!

- Communicate And Update Progress Regularly – Face-to-face Meetings, Conference-calls, Emails
- Create A Hard Copy Of The Proposal (Working Document)
- Assemble The Grant (Signatures, Letters Of Support, Etc.)
- Proposal Review – Primary Team, Second Team, Final Review Team (Build In Time For Mistakes, Errors, Etc.)
RULES FOR SUCCESSFUL GRANT WRITING

PRE-APPLICATION INSTRUCTIONS
LIST OF GRANT DELIVERABLES

NON-PROFIT BUSINESS PROFILE
Business Name & Address
President (Name, Address, Email, Telephone, Alternate Telephone)
Primary Point of Contact (Name, Address, Email, Telephone, Alternate Telephone)
Non-profit (Copies – Articles of Incorporation, Tax Exempt Letter, 990, etc.)

GRANT PROPOSAL
Project Title
Project Narrative
Project Summary (Abstract)
Specific Aims
Statement of Need (Services Provided, Demographic Served, Data, Statistics, Supporting Information)
Impact (Outcome, Measurements, Milestones, Definition of Success)
Models of Success (Source of Project Ideas)
Bibliography and Cited Literature Sources (when applicable)

RESUMES
Business Organizational Structure
Project Organizational Structure (Collaborative Partners, Governmental, Faith-based, etc.)
Contact Information List

BUDGET
Budget (Project & Non-Profit Annual Report)
Budget Justification

SUPPORTING DOCUMENTS
Target Demographic
Letters of Supports (Collaborative Partners, Consortium/Contractual Agreements
Management Plan (Staff, Volunteers)
Facilities and Other Resources
RULES FOR SUCCESSFUL GRANT WRITING

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RULES FOR SUCCESSFUL GRANT WRITING

SECTIONS OF THE PROPOSAL!

- Proposal Narrative/Research or Project Plan
- Background, Significance or Supporting Data
- Organizational Structure & Management Plan
- Experience & Past Performance
- Budget & Budget Justification
- Implementation Plan - Use of Funds, Quality Assurances, Reaching Target Group, etc.
- Collaborative Partners, Letters of Support & Matching Funds Commitments
- Plan for Self-Evaluation & Reporting
RULES OF SUCCESSFUL GRANT WRITING

WHAT IS ESSENTIAL TO SUBMITTING THE GRANT!

- Outstanding Packaging, Organized Presentation and Table of Contents
- Answers the Basics with Specific Details/Data – Who, What, When, Where, Why and How?
- Well-substantiated approach, data, statistics, etc.
- Infrastructure, Experience, “Skin in the Game” to Accomplish Tasks and Reach Milestones
- Well-Documented, Justified Budget
- Effectiveness or Measurable Outcomes
RULES FOR SUCCESSFUL GRANT WRITING
IT'S ALL ABOUT THE NUMBERS!

- Volunteer Hours: [http://www.handsonnetwork.org/tools/volunteercalculator](http://www.handsonnetwork.org/tools/volunteercalculator)
- Organizational Self-Assessment: [https://www.councilofnonprofits.org/tools-resources/organizational-self-assessments](https://www.councilofnonprofits.org/tools-resources/organizational-self-assessments)
- Impact: [http://managementhelp.org/evaluation/program-evaluation-guide.htm](http://managementhelp.org/evaluation/program-evaluation-guide.htm)
# The Sapeo Foundation - Required Grant Proposal Budget Format

## Citizens for Planned Growth

### General Operating Budget

<table>
<thead>
<tr>
<th>Category</th>
<th>FY2023 Budget</th>
<th>FY2024 Actual</th>
<th>FY2024 Budget</th>
<th>FY2024 3rd Qtr.</th>
<th>FY2024 Projected</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Income</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Events</td>
<td>50,000</td>
<td>50,000</td>
<td>50,000</td>
<td>50,000</td>
<td>50,000</td>
</tr>
<tr>
<td>Grants (loss at least of other sources of proposed PCB funding)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Public Welfare Foundation</td>
<td>20,000</td>
<td>20,000</td>
<td>20,000</td>
<td>20,000</td>
<td>20,000</td>
</tr>
<tr>
<td>Taylor Family Foundation</td>
<td>15,000</td>
<td>15,000</td>
<td>15,000</td>
<td>15,000</td>
<td>15,000</td>
</tr>
<tr>
<td>Annie E. Case Foundation</td>
<td>30,000</td>
<td>30,000</td>
<td>30,000</td>
<td>30,000</td>
<td>30,000</td>
</tr>
<tr>
<td>Corporate Contributions</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Total Income</strong></td>
<td>$204,000</td>
<td>$197,600</td>
<td>$226,300</td>
<td>$175,300</td>
<td>$256,700</td>
</tr>
</tbody>
</table>

### Expense

<table>
<thead>
<tr>
<th>Category</th>
<th>FY2023</th>
<th>FY2024</th>
<th>FY2024</th>
<th>FY2024</th>
<th>FY2024</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accounting/Bookkeeping</td>
<td>5,000</td>
<td>5,000</td>
<td>5,000</td>
<td>5,000</td>
<td>5,000</td>
</tr>
<tr>
<td>Board &amp; Officers' Expenses</td>
<td>3,000</td>
<td>3,000</td>
<td>3,000</td>
<td>3,000</td>
<td>3,000</td>
</tr>
<tr>
<td>Conferences &amp; Meetings</td>
<td>2,000</td>
<td>2,000</td>
<td>2,000</td>
<td>2,000</td>
<td>2,000</td>
</tr>
<tr>
<td>Dues &amp; Memberships</td>
<td>800</td>
<td>800</td>
<td>800</td>
<td>800</td>
<td>800</td>
</tr>
<tr>
<td>Furniture &amp; Equipment</td>
<td>1,400</td>
<td>1,400</td>
<td>1,400</td>
<td>1,400</td>
<td>1,400</td>
</tr>
<tr>
<td>Legal Expenses</td>
<td>10,000</td>
<td>9,000</td>
<td>12,000</td>
<td>10,000</td>
<td>12,000</td>
</tr>
<tr>
<td>Miscellaneous</td>
<td>500</td>
<td>500</td>
<td>500</td>
<td>500</td>
<td>500</td>
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<tr>
<td>Personnel</td>
<td>55,000</td>
<td>55,000</td>
<td>55,000</td>
<td>55,000</td>
<td>55,000</td>
</tr>
<tr>
<td>Executive Director</td>
<td>20,000</td>
<td>20,000</td>
<td>20,000</td>
<td>20,000</td>
<td>20,000</td>
</tr>
<tr>
<td>Office Manager</td>
<td>30,000</td>
<td>30,000</td>
<td>30,000</td>
<td>30,000</td>
<td>30,000</td>
</tr>
<tr>
<td>Rent &amp; Utilities</td>
<td>4,000</td>
<td>4,000</td>
<td>4,000</td>
<td>4,000</td>
<td>4,000</td>
</tr>
<tr>
<td>Health &amp; Disability Insurance</td>
<td>3,000</td>
<td>3,000</td>
<td>3,000</td>
<td>3,000</td>
<td>3,000</td>
</tr>
<tr>
<td>Meals &amp; Travel</td>
<td>2,000</td>
<td>2,000</td>
<td>2,000</td>
<td>2,000</td>
<td>2,000</td>
</tr>
<tr>
<td>Social Security Tax</td>
<td>2,000</td>
<td>2,000</td>
<td>2,000</td>
<td>2,000</td>
<td>2,000</td>
</tr>
<tr>
<td>Professional Fees</td>
<td>2,000</td>
<td>2,000</td>
<td>2,000</td>
<td>2,000</td>
<td>2,000</td>
</tr>
<tr>
<td>Printing</td>
<td>1,500</td>
<td>1,500</td>
<td>1,500</td>
<td>1,500</td>
<td>1,500</td>
</tr>
<tr>
<td>Annual Report &amp; Promotion</td>
<td>50,000</td>
<td>50,000</td>
<td>50,000</td>
<td>50,000</td>
<td>50,000</td>
</tr>
<tr>
<td>Rent &amp; Utilities</td>
<td>5,000</td>
<td>5,000</td>
<td>5,000</td>
<td>5,000</td>
<td>5,000</td>
</tr>
<tr>
<td>Supplies, Office</td>
<td>1,000</td>
<td>1,000</td>
<td>1,000</td>
<td>1,000</td>
<td>1,000</td>
</tr>
<tr>
<td>Technology/Training</td>
<td>1,000</td>
<td>1,000</td>
<td>1,000</td>
<td>1,000</td>
<td>1,000</td>
</tr>
<tr>
<td>Telephone</td>
<td>5,000</td>
<td>5,000</td>
<td>5,000</td>
<td>5,000</td>
<td>5,000</td>
</tr>
<tr>
<td><strong>Total Expense</strong></td>
<td>$290,170</td>
<td>$287,600</td>
<td>$326,300</td>
<td>$275,300</td>
<td>$256,700</td>
</tr>
</tbody>
</table>

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1. The legal name of your organization.
2. List all of your organization’s categories using this format.
3. Your Board-approved budget for the last complete operating year.
4. Your Board-approved budget for the current operating year.
5. The revised income and expenses for the last 3rd quarter of the fiscal year.
6. Your Board-approved projected budget for next year.
7. Grant income must be itemized and identified as secured or pending. You may use the last page to explain the status of proposed funding. List funding by source, amount requested, and status of receipt.
8. All cash in the Program Budget must be identified as secured or pending. List all proposed funding sources using this format. The Sapeo Foundation will not fund 100% of any operating budget, program, or project.

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**GRANT APPLICATION BUDGET!**
## Operational Budget!

### XYZ Nonprofit Community Theater Operations Budget

**Operations Budget Overview Fiscal Year 2019**

<table>
<thead>
<tr>
<th>Earned Revenue</th>
<th>Expenses</th>
<th>Net</th>
</tr>
</thead>
<tbody>
<tr>
<td>Concerts</td>
<td>48,500</td>
<td>43,860</td>
</tr>
<tr>
<td>Films</td>
<td>93,600</td>
<td>93,000</td>
</tr>
<tr>
<td>Arts in Education</td>
<td>15,550</td>
<td>17,090</td>
</tr>
<tr>
<td>Rentals</td>
<td>130,590</td>
<td>99,800</td>
</tr>
<tr>
<td>Concessions</td>
<td>37,200</td>
<td>18,020</td>
</tr>
<tr>
<td>Ticketing Fees</td>
<td>34,400</td>
<td>24,990</td>
</tr>
<tr>
<td>Marketing</td>
<td>21,200</td>
<td>21,200</td>
</tr>
<tr>
<td><strong>Total Earned Revenue</strong></td>
<td><strong>$360,150</strong></td>
<td><strong>$315,930</strong></td>
</tr>
</tbody>
</table>

| Unearned Revenue        |                          |              |
| Membership              | 46,800                   | 3,109        |
| City Funding            | 16,400                   | 10,400       |
| County Funding          | 2,580                    | 2,500        |
| State Funding           | 2,090                    | 2,090        |
| Individual & Business Sponsors | 12,700 | 12,700 |
| Monthly Program Guide Sponsors | 9,000 | 9,000 |
| Earmarked Education Grants | 15,000 | 15,000 |
| Concert & Film Sponsors | 2,500                    | 2,500        |
| Event Sponsors          | 22,500                   | 22,500       |
| Fundraising Events      | 92,709                   | 48,200       |
| Interest                | 24                       | 149,990      |
| **Total Unearned Revenue**| **$115,524**             | **$243,722** |

**Total Revenue**      **Total Expenses**  **Total Income**

$575,674                $558,152                $17,522
EXCEPTIONAL GRANT PROPOSALS

- Clearly and concisely presents the organization and provides all of the requested information.
- Ease of Reading & No Typos, Misspelled Words, etc.
- Logical Presentation of Justified Need or Specific Request
- Passion “Tell The Story”…. “Sell the Story”
EXCEPTIONAL GRANT PROPOSALS

- Strong Collaborations, Innovation or Impact
- Achievable Approach & Measurable Results
- Efficient Use of the Grant Award
- Experience, Progressive Growth, Data-Driven, Details, etc.
- Vision/Plan for the Future, Next Steps, etc.
RULES FOR SUCCESSFUL GRANT WRITING

LET'S TALK ABOUT THE BUDGET!


- Components of the Budget
  - Direct Costs – Personnel, Fringe Benefits, Equipment, Supplies, Travel
  - In-Kind Contributions
  - Indirect Costs (Building, Operating Costs…)

- [http://nonprofit.about.com/od/foundationfundinggrants/a/grantbudget.htm](http://nonprofit.about.com/od/foundationfundinggrants/a/grantbudget.htm)
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GRANT WRITER OR NOT?

- You are responsible for the grant that you sign and submit!
- Read the Application – You are the Subject Matter Expert and must implement the plan that is proposed.
- Ask for writing samples, client references, win rates.
- Sign an agreement that clearly states or ensures terms, process, timelines and confidentiality assurances.
- Establish a plan for communication - Grant Writers are only as good as the information provided!
- You get what you pay for!
You are responsible for the grant that you sign and submit!

Training, Tools and Resources

- Maryland Governor’s Grants Office (http://grants.maryland.gov)

- Maryland Nonprofits (http://www.marylandnonprofits.org)

- Foundation Center (http://foundationcenter.org/findfunders/cga.html)
SUCCESSFUL GRANT WRITING TIPS

- Collaboration, Partnerships, Strong Board
- Prospect Research, Funding Strategies
- Data, Research, Information
- Integration Of Technology & Innovation
- Hot Buttons & Win Themes
GOVERNOR’S GRANTS OFFICE

BASIC GRANTS TRAINING 2017

Jennifer B. Jones
jonesjipad@gmail.com
240.640.9546