

Board Development

Writing a Grant Proposal

You are a staff person or board member tasked with writing a grant proposal. **DON'T PANIC!** The information outlined in the following paragraphs should give you an understanding of what processes to follow and what documentation is necessary to write a grant proposal.

What Do I Do First?

Though the specific requirements of grant makers vary, and your proposal should be tailored for each funder, all grant applications involve just one basic activity: responding to a set of questions about your organization, its programs and your request.

Before you conduct your pre-proposal research you need to gather documentation that will make the writing much easier. You need to gather background documentation in three areas:

1. **Concept** – It is important that you have a good sense of how the project fits into the mission/purpose of your organization. Funders want to know that a project reinforces the overall direction of an organization, and they may need to be convinced that the case for the project is compelling. You should collect background data on your organization and on the need to be addressed so that your arguments are well-documented.
2. **Project** – Here is a check list of the project information you require:
 - a. The nature of the project and how it will be conducted.
 - b. The timetable for the project.
 - c. The anticipated outcomes and how best to evaluate the results.
 - d. Staffing needs, including deployment of existing staff and new hires.
- 3 **Expenses** – You will not be able to pin down all the expenses associated with the project until the project details and timing have been worked out. However, at this stage you do need to sketch out the broad outlines of the budget to be sure that the costs are in reasonable proportion to the outcomes you anticipate.

Where Do I Search for Funders?

There are many types of funders for you to research in order to determine which grants are most appropriate for your project. There are municipal government grants (i.e. Family & Community Support Services), provincial government

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*Your organization's
President/Chairperson and
Treasurer will always be involved
with the proposal.*

*By making contact with the funder
you start to establish a relationship
with them.*

grants (i.e. lottery agencies and foundations), federal government grants (i.e. Heritage Canada), family or private grants (i.e. Muttart Foundation, Kahanoff Foundation), community foundations (i.e. Edmonton Community Foundation, Calgary Community Foundation), United Way, service clubs (i.e. Rotary, Lions) and corporations (i.e. CIBC, Telus).

Many of these funders can be searched through their various websites. Another source of information on funders is an online publication called the "Canadian Directory to Foundations and Corporations" through IMAGINE Canada. You can access this resource at most libraries. You can also look under "Resources" on the website www.charityvillage.com.

When Do I Start? Who Do I Contact and How?

It is very important to know that on average most funders take up to three months to make a decision on an application, therefore, leave yourself plenty of time to put together your background information, research possible funders, inquire and make initial contact, send in the letter of inquiry (when applicable) and write the application.

Making initial contact by telephone may be quicker and more effective since you will have an opportunity to talk about your project, ask questions and even set up appointments. Make sure the person you have contacted is the consultant that works in the funding program. Keep in mind that some funders have no problem with you making contact with them through email or by letter of inquiry (post may take a longer time). When you call or email the funder, tell them who you are, your title, the name of the organization and how you are incorporated. Once you have established that your organization and the project are eligible, ask for a current application form. They will either have the application form on their website or they will mail one to you. Some funders prefer you to fill it out online. Some funders will ask you to send a letter of intent before an application is welcomed. Some funders will ask you to complete the letter of intent online. It is important to ask the funder about their application process, especially if you do not have access to internet or a computer.

The Letter of Intent

Funding agencies or foundations with or without application guidelines may ask for a letter of intent. Some funders provide guidelines for the letter of intent.

View the letter of intent as a brief, focused proposal. The primary objective of a letter of intent is to demonstrate that the organization and the program fit within the grant maker's funding priorities.

Letters of intent are used by funders to make an initial screening and determine whether to ask you for a grant proposal. Some funders can decide from the letter of intent to fund or not to fund.

The letter of intent should meet the following criteria:

- Include funder's name, title and address
- Be directed to the individual responsible for the funding program.
- Provide a brief overview of the organization and its purpose.
- Include the reason for the funding request.
- Include the amount requested.
- Describe the need the project intends to meet.
- Provide a brief description of the project.
- List other prospective funders of the project.
- Include a thank you and describe the next step in the project.
- Do not exceed three pages.
- Include name, email and phone number of contact at the organization.
- Be signed by the person who can speak with authority on behalf of the organization.
- Attach any supporting documentation if applicable.

When you are writing your letter of intent it is important to condense – with only three pages of text, each sentence must be scrutinized when editing. Focus on detail, clarity and conciseness.

Writing the Proposal

The following is a general list of the contents that are generally included in a grant proposal.

Cover Letter

Most proposals should be sent with a cover letter. The cover letter should come from the President or Chairperson of your organization, in order to show the full support of the organization in implementing the project. It should be written on your organization's letterhead, have the same date that the completed application will be sent, and be sent to the person who works in the granting program. The first paragraph should be a short, focused introductory statement that includes the organization's name and ends with the action you request by the funding source. The second paragraph is a three to six sentence statement explaining why your organization is targeting this funder for support. The third and final paragraph is a closing thought or reflection about what the funding partnership can mean for the future of your target audience. Use a standard closing.

Do not send proposals to all types of funders without researching their parameters.

Executive Summary

Although this is the first inside page of the proposal, it is the section that should be written last. You will provide the reader with a snapshot of what is to follow. Specifically, it summarizes all of the key information and is a sales document designed to convince the reader that this project should be considered for support. Be certain to include the name of the organization and its expertise, the problem, the solution and the funding requirements.

Introduction

A good introduction should be brief, interesting and free of jargon. Clearly establish who you are, give a sense of your operating principles and describe your programs and activities. State your mission, whom you serve and your track record of achievement. Add other details that build the credibility of your organization. Explain how you are connected with the community, including your partnerships.

Project Description

The project description is the most important written part of the proposal. It should provide detailed information about your plans, and specific goals and how you will meet them. This is the section you should expect the grant consultant to read most carefully, and where you should spend the majority of your time.

*The funder will ask:
Who, When, Why, What, Where
and How.*

- a. **Statement of Need:** The statement of need will enable the reader to learn more about the issues. You want the need section to be concise, yet persuasive. You must demonstrate to the reader that the project you propose is important enough to merit funding, that it is extensive enough to warrant the amount you are requesting and that it is urgent enough to be funded right now. The statement of need must show an accurate and specific definition of the need/problem, show that there is evidence of need, that the need is clearly defined, that the need is solvable and that there is a logical connection between your organization and the need.

- b. **Objectives:** Objectives signify changed conditions; they describe the results or outcomes of your actions. They must be attainable, realistic and measurable. Objectives have three characteristics:
 - a. They are specific: An objective tells exactly which problem is to be addressed.
 - b. They are measurable: An objective is framed in terms of how much and how many. It states to what extent the problem or need will be resolved.
 - c. They include a time frame: An objective gives a specific date for its achievement.

*Do not confuse your objectives
(ends) with your methods (means).*

There are at least four types of objectives:

1. Behavioural – A human action is anticipated.
2. Performance – A specific time frame within which a behaviour will occur at an expected proficiency level.
3. Process – The manner in which something occurs is an end in itself.
4. Product – A tangible item result.

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- c. **Method and Activities:** The method section describes your project activities in detail, indicating how your objectives will be accomplished. Your methods should:
- Flow naturally from the problem and objectives.
 - Clearly describe project activities.
 - State why each activity was selected.
 - Describe the sequence of activities.
 - Describe the staffing of the program.
 - Describe the clients to be served and how they were or will be chosen.
 - Present a reasonable scope of activities that can be conducted within the time frame and according to the resources of the project.
- d. **Evaluation:** Proposals must include a plan for determining the degree to which objectives are met and methods are followed. The evaluation section should meet the following criteria:
- Present a plan for evaluating the accomplishment of objectives.
 - Present a plan for evaluating and modifying methods over the course of the program.
 - Tell who will be doing the evaluation and how they were chosen.
 - Clearly state evaluation criteria.
 - Describe how data will be gathered.
 - Explain any test instruments or questionnaires to be used.
 - Describe the process of data analysis.
 - Show how evaluation will be used for program improvements
 - Describe any evaluation reports to be produced.

Generally, a straightforward, chronological description of the operations of the proposed project works most effectively.

Financial Information

Budget

Use the budget section of your grant proposal to tell the funder how much money you want, what the money will purchase, what total funding resources are needed and what partners are involved in running the project. The budget is the project plan expressed in terms of the dollars that you require to bring your project to a successful conclusion. While the degree of specificity of any budget will vary depending on the nature of the project and the guidelines of the funder, a complete, well thought out budget serves to reinforce the applicant's credibility.

The budget should be:

- detailed and accurate,
- have expenses explained in the budget notes section,
- be broken down by categories and sub-categories,
- be broken down in order of priority,
- have accurately priced items within each category,
- include the time frame of expenditures,
- have the total income equal the total expenses, and
- note the actual and anticipated contributions of other funders.

You must be careful to make sure that every section of the budget is consistent with the corresponding project description portion of the proposal. It is important to make sure that the format of the budget is realistic, and easy to follow and understand.

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The following is a general sample of a budget you could use as a template:

SAMPLE PROJECT BUDGET

PROJECT TITLE: XYZ SOCIETY'S PROGRAM COORDINATION
PROJECT TIMEFRAME: January 1, 20XX to December 31, 20XX

| 1 | 2 | 3 | 4 | 5 |
|--------------------------------|-------------------|-------------------------------------|----------------------------------|---------------------------------|
| Description of Item | Projected Expense | Funds provided by applicant, if any | Funds provided by others, if any | Funds requested from the Funder |
| Personnel | | | | |
| 1.1 Program Coordinator salary | \$ | \$ | \$ | \$ |
| 1.2 Benefits | \$ | \$ | \$ | \$ |
| Computer | \$ | \$ | \$ | \$ |
| Office Supplies | \$ | \$ | \$ | \$ |
| TOTAL | \$ | \$ | \$ | \$ |
| Funding sources: | | | | |
| Foundation Grant | \$ | | | |
| City/Town | \$ | | | |
| Applicant | \$ | | | |

Check your numbers to make sure the totals add up.

Future Plan and Sustainability

How will the project continue after the funding has ended? All funders will ask this question and it is important to demonstrate that you have developed a long-term funding plan.

Financial Statements

A question funders will ask themselves – is there a need for financial assistance? Submitting your last completed year's financial statements shows the funder a picture of your financial situation, tells them what types of financial partnerships have been established, and what types of fundraising the organization has

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accomplished. Also submitting your current balance sheet and current statement of revenue and expenditure shows the funder your need for financial assistance. Most funders require original signatures on these financial statements unless they have been prepared by a chartered accountant and printed on that company's letterhead.

Cash reserves: If you have any cash assets you should explain to the funder where these funds are allocated if not all toward this project. Indicate to the funder the funds that the board has control to use, and the funds that are designated by other funding agencies.

Community Fundraising and Goods and Services In-Kind

Some funders require you to match the requested amount from your past or current fundraising and goods and services in-kind. Fundraising mainly consists of cash (fundraising events, bingos, casinos, etc.) and donations (individuals, corporations, service clubs, funders, etc.). Goods and services in-kind refer to product that you have or will receive that you can put a market value to (i.e. a donated computer, free secretary services). You can show a breakdown of fundraising from the statement of revenue section of the financial statement. Some funders who require matching funds might ask for an accounting statement showing the funds in the bank.

Matching could be from all types of revenue obtained for the project or from the past year. Ask the funder what can be used toward the matching request.

Organization's Volunteers

It is important to explain how volunteers are used in your organization. Explain how your volunteers are involved in your programs. Some funders allow you to use volunteer hours toward the match of your grant request (guidelines will indicate what value can be assigned to volunteer hours).

List of Board of Directors

Most funders want to see a list of your directors as it may add credibility to your application.

Declaration and Grant Agreement

Most funders request that your president or treasurer or a person with legal signing authority sign the declaration and grant agreement. This is a document that verifies that the information you have submitted is true and by signing this document you enter a contractual agreement with the funder.

Proofread and review all information.

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Be sure to contact the funder if you cannot meet his deadline and do not wait until a week before the report is due.

Make a copy of the proposal for your records.



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Appendices

Please read the guidelines carefully and thoroughly as not all funders require the same appendices. These may include:

- documents of incorporation or proof of legal status,
- cost estimates,
- letters of support for the project, and
- any other special information requested by the funder.

Review and Evaluation of Your Proposal

The best way to evaluate your proposal before you send it to the funder is to ask an outside individual to read and comment on the proposal.

After You Receive the Grant....

Read your grant letter of approval and agreement carefully, diarize the due date(s) for reports, notify your funder of any changes, and recognize the contribution made by the funder.

An organization that accepts a grant must report on the expenditure of those funds. Good accounting practices help toward future positive funding opportunities.

It is very important to thank the funder whether you receive funding or not. This keeps the relationship alive; you may very well submit another grant proposal to this funder in the future.

In Conclusion

A proposal should reflect planning, research and vision. The importance of research cannot be overemphasized, both in terms of the funders solicited and the types of funds requested. The appropriate format should be used, and the required attachments should be included.

The most successful proposals are those that clearly and concisely state the community's and organization's needs and are targeted to funders who fund that field. Submitting a proposal that does these two things is a reflection of careful planning and research.



About the Author:

WINSTON MCCONNELL, eighteen years consulting with volunteer, non-profit organizations on how to best prepare their applications for funding as Coordinator of the former Wild Rose Foundation's Financial Support Unit, and now coordinator of the new Community Initiatives Program Community Operating Grant, has provided Winston with valuable experience in the dynamics of the funder-application relationship and the intricacies of preparing and analyzing applications.