Grant Writing Workshop

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Grant Writing 101

Grant readiness
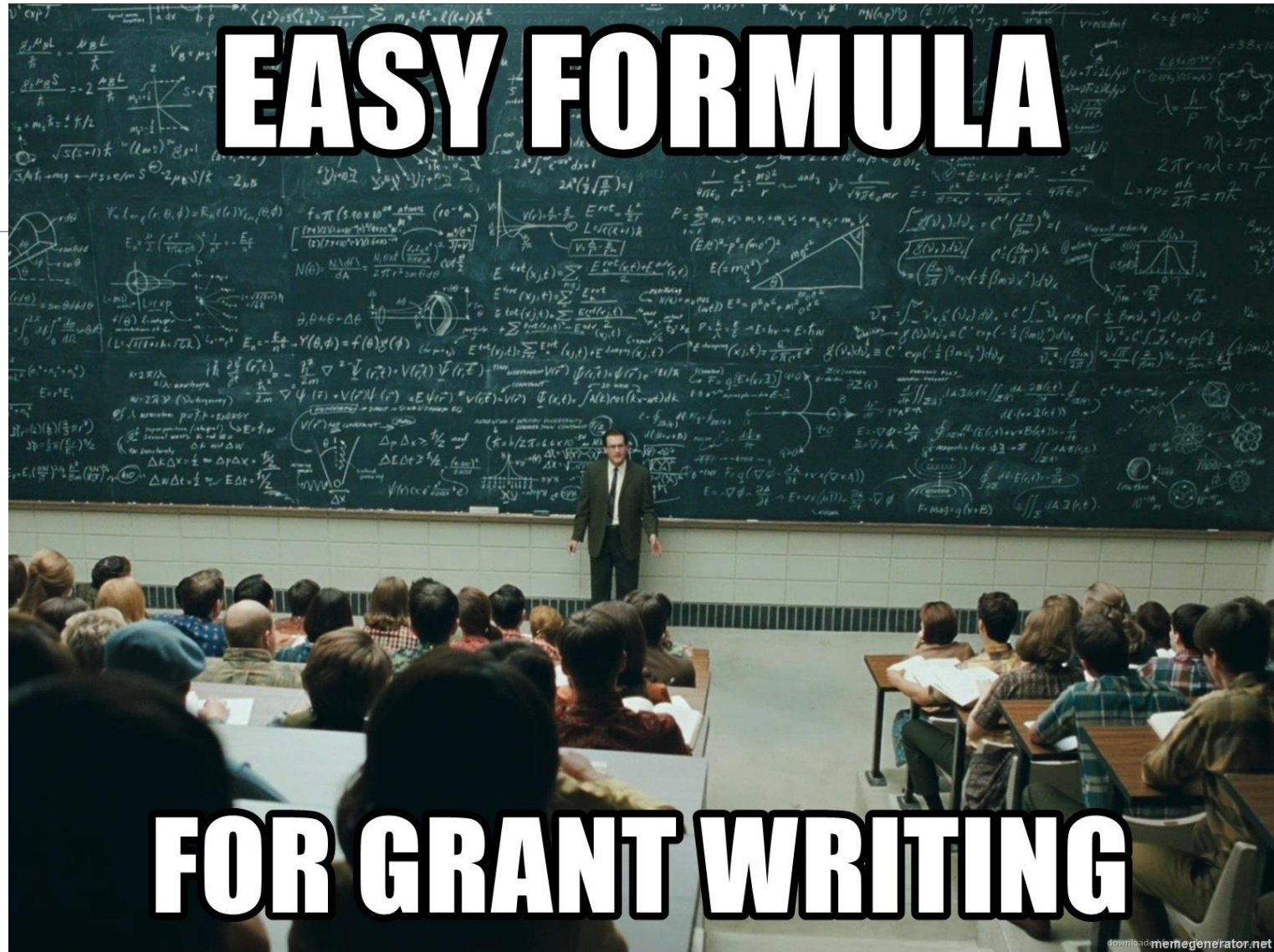
Eligibility

Writing grants
- Need, goals, and objectives
- Budget
- Evaluation
- Sustainability

Success and rejection
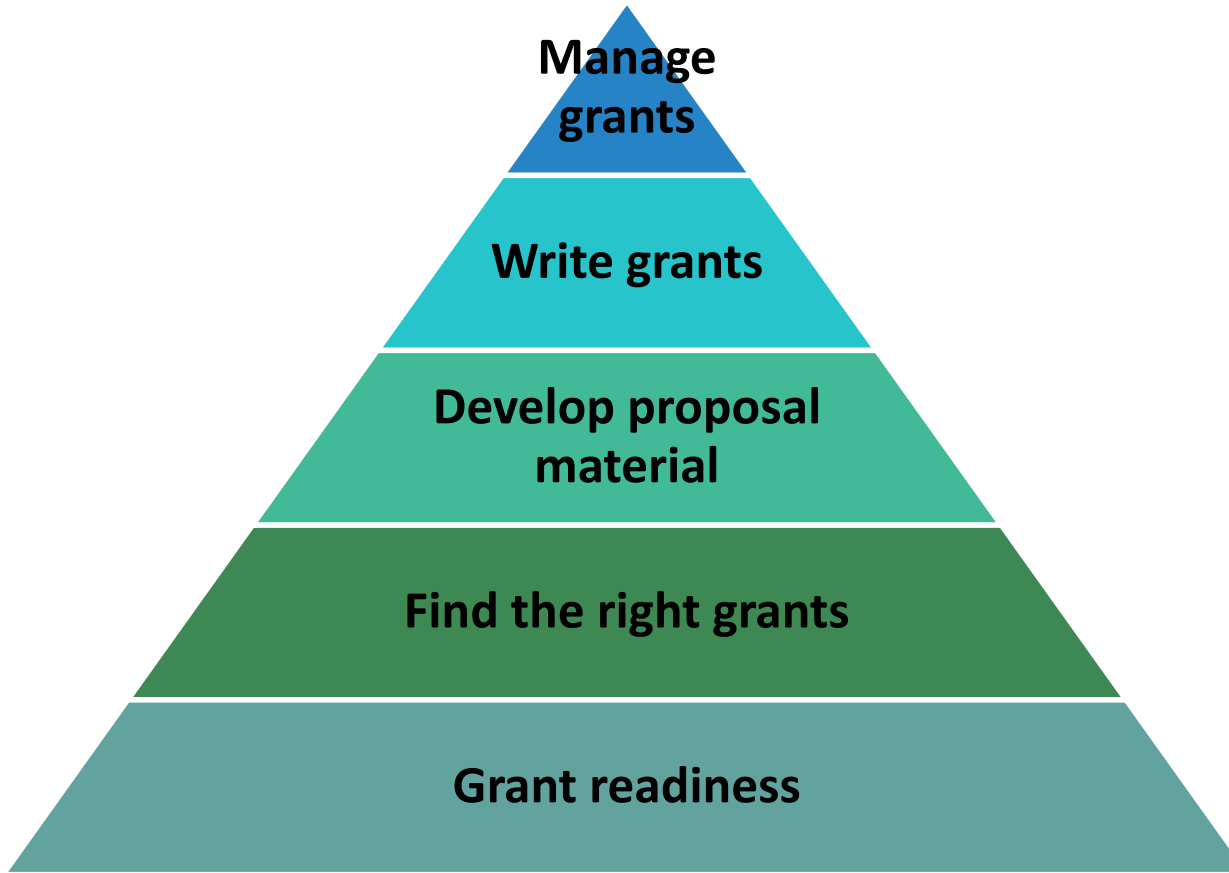
Relationships matter

Tips and tricks

EASY FORMULA

FOR GRANT WRITING

Grant ready

Pyramid (bottom to top):
- Grant readiness
- Find the right grants
- Develop proposal material
- Write grants
- Manage grants

*Upstream Consulting

Get grant ready

Writing grants costs you time (i.e., money)

✓Non-profit status

✓Engaged board of directors that supports fundraising

✓Formal and informal partnerships with other organizations, businesses, educational institutions

✓Professional and dedicated staff and/or volunteers

✓Strategic plan – guides organizational, program, and service decisions

Get grant ready

✓Description and history of the organization

✓Finances – board-approved budgets, *diverse* fundraising plan

✓Recent data that shows the need of your programming in your community

✓Descriptions of programs or services – goals and objectives, activities, key staff, evaluations, and successes

✓***Able to meet reporting requirements and deadlines***

Eligibility and RFP's

Read the guidelines or RFP <u>again</u> and <u>again</u> and <u>again</u>
- **Keep it in front of you as you write**

Get to really know the grant maker
- Why they give?
- Who they give to?
- How small or large they are?
- Where did they money they're granting come from originally?
- Who donates to their foundation?
- Who is on their board and what are their affiliates?

Know the funders materials & language (e.g. vital signs)

Assess how well your mission fit with the funding priorities

Me trying to explain to funders how our missions are aligned

@changefunding
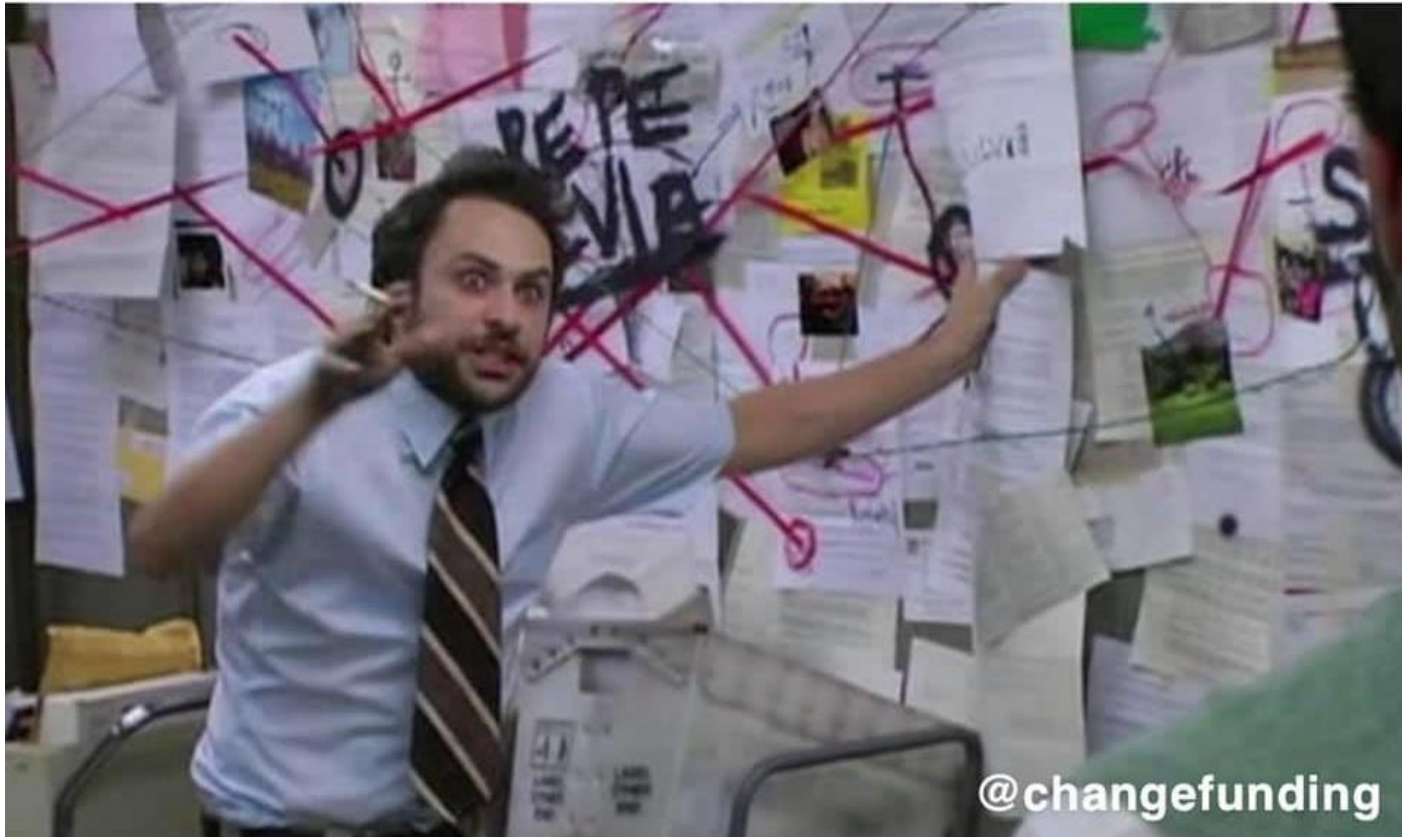
Grassroots and new organizations

Harder, but not impossible!

Show that your organization:
- Good steward of funds
- Is organized and understand what it takes to run programs
- Partners with other groups
- Generates other revenue (e.g. fundraising, memberships, board giving)
- Recruits volunteers

Document in-kind donations!

Writing grants - preparation

❑Understand guidelines

❑Understand how you align

❑Make your outline

  ❑Copy and paste application into word

  ❑Turn questions into headings and subheadings

  ❑Now you're not staring at a blank page!

Describe the **project/program <u>in detail</u>** and **how it helps fulfill the mission** of your organization. Make sure this is clear and concise, **describing the overall program request, not just agency activities**. 2000 characters

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Program description:

Mission:

How it fulfills the mission:

You can removed the subheadings after (character limits), but this ensures you're answering their questions fully and how they want to see it

Preparation

❑Gather your information and material you'll need (e.g. organization info, programs, target population, statistics, reports, marketing materials, resumes of key staff)

Tip: Do this at a 'lull' time in your year and update often!

Tip: Keep your mission, vision, and values in front of you as you write

Writing grants

1. Problem statement/needs

2. Program description

3. Goals and objectives

4. Evaluation plan

5. Budget and budget narrative

Needs

❑Must be compelling – you want the grant reviewer to convince the panel that your program is worth funding because it solves _____ critical problem.

❑**There are MANY needs. Your job is to make the funder care about your need.**

   ❑**Data + stories!**

❑Research local and regional information to support your argument

DATA

SORTED

ARRANGED

PRESENTED
VISUALLY
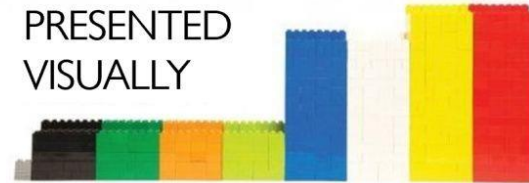
EXPLAINED
WITH A STORY

Credit: Andreas von der Heydt

Problem/need statement

Develop your problem statement/need section

Weak

- "All children need exposure to artists and the opportunity to paint on weekends to keep them out of trouble."

Strong

- "Children in the Wishbone Housing Project have the highest school dropout rate in the city of Rosemont. Their family income is the lowest of any Rosemont housing project. According to their parents and teachers, as well as police officers, clergy, and local business owners, children who will participate in this weekend arts project have no other activities to occupy them. The proposed arts program has been shown in other cities (e.g., Memphis and Sacramento) to provide children with an outlet that increases reading scores, reduces their participation in vandalism, and encourages them to stay in school."

The Only Grant Writing Book You'll Ever Need – Ellen Karsh and Arlen Sue Fox

Program description

❑Clear and clean - no questions remain

❑Clearly shows best practices, sustainability, and measurable outcomes

❑Be explicit with **theory of action** – what will happen when your strategies are implemented?

❑What is the program? Who is the leadership?

❑What makes it great?

❑Why will it accomplish what you hope?

❑Don't use jargon – just say what you're going to do – transformational work!

Program description

Reasonable

Doable

Implementable

Aligned with your vision

Goals

General statement of what you want to achieve

Long-term (beyond funding period)

Objectives

Measurable specific actions and steps you will take to achieve goal

SMART

Objectives

Specific	• Specifically, we will…
Measurable	• To measure to objective, we will…
Achievable	• Objective is achievable because…
Relevant	• Objective is relevant because…
Time-bound	• Timeline is…

Collaborative after-school basketball project

Goal:

"To decrease the number of students who drop-out of high school before graduation."

The Only Grant Writing Book You'll Ever Need – Ellen Karsh and Arlen Sue Fox

Objectives:

"Objective 1: Improved behaviour.

By the end of the first six months, participants in the after-school basketball project will demonstrate improved behaviour in school as a result of project requirements and activities, as measured by incident reports and teacher observation before the league starts and six months later."

Collaborative after-school basketball project

"Objective 2: Reduction in violent incidents

By the end of the basketball project, participants will demonstrate a 50% decrease in violent incidents, as measured by school incident reports."

The Only Grant Writing Book You'll Ever Need – Ellen Karsh and Arlen Sue Fox

"Objective 3: Improved school attendance

By the end of the basketball project, participants will have a 40% better school attendance record than classmates who did not participate in project activities."

Outcomes vs. outputs

Outputs	• Your activities • *Meals served by soup kitchen*
Outcomes	• Observed impacts of your activities on participants/beneficiaries • *Degree serving meals reduced hunger in the population*
Impact or Outcome Indicators	• Degree your activities can be attributed to your outcomes • How much can the meals be attributed to reducing hunger?

Great resource: https://ssir.org/articles/entry/getting_results_outputs_outcomes_impact#

Evaluation plan

Key aspect – needs to be embedded throughout the program

❑ Every program needs to be evaluated to improve

❑ Simple before and after surveys to personal interviews, focus groups, and standardized measures

❑ Your program staff will know what to ask to understand if your program is meeting its objectives. This should be embedded in all your programming so you can share about it on your application.

Just find a way to know if you're making the difference you planned on so you can make changes if needed.

Budget

- Should make sense on its own

- Keep it simple and clear – *must use budget template if provided*

- Reasonable – realistic - appropriate

- Overhead, staffing, program costs – accurate reflection
  - Don't ask for more than they give, but be realistic about salaries and costs

- In-kind
  - Show how you're leveraging in-kind donations

- Show other revenue besides this grant

Sustainability

❑Diversify funding and plan for future financial stability
- ❑Have leadership and vision
- ❑Is there community buy-in for the project?

❑If there is room:
- ❑ Tell them about other ways you're seeking funding for other programs to show sustainability

Sustainability

❑Other ways to raise funds

    ✓Do you have creative ways?

    ✓Board members each raise X amount?

    ✓In-kind donations?

    ✓Membership fees?

    ✓Events?

    ✓Online fundraisers or donations?
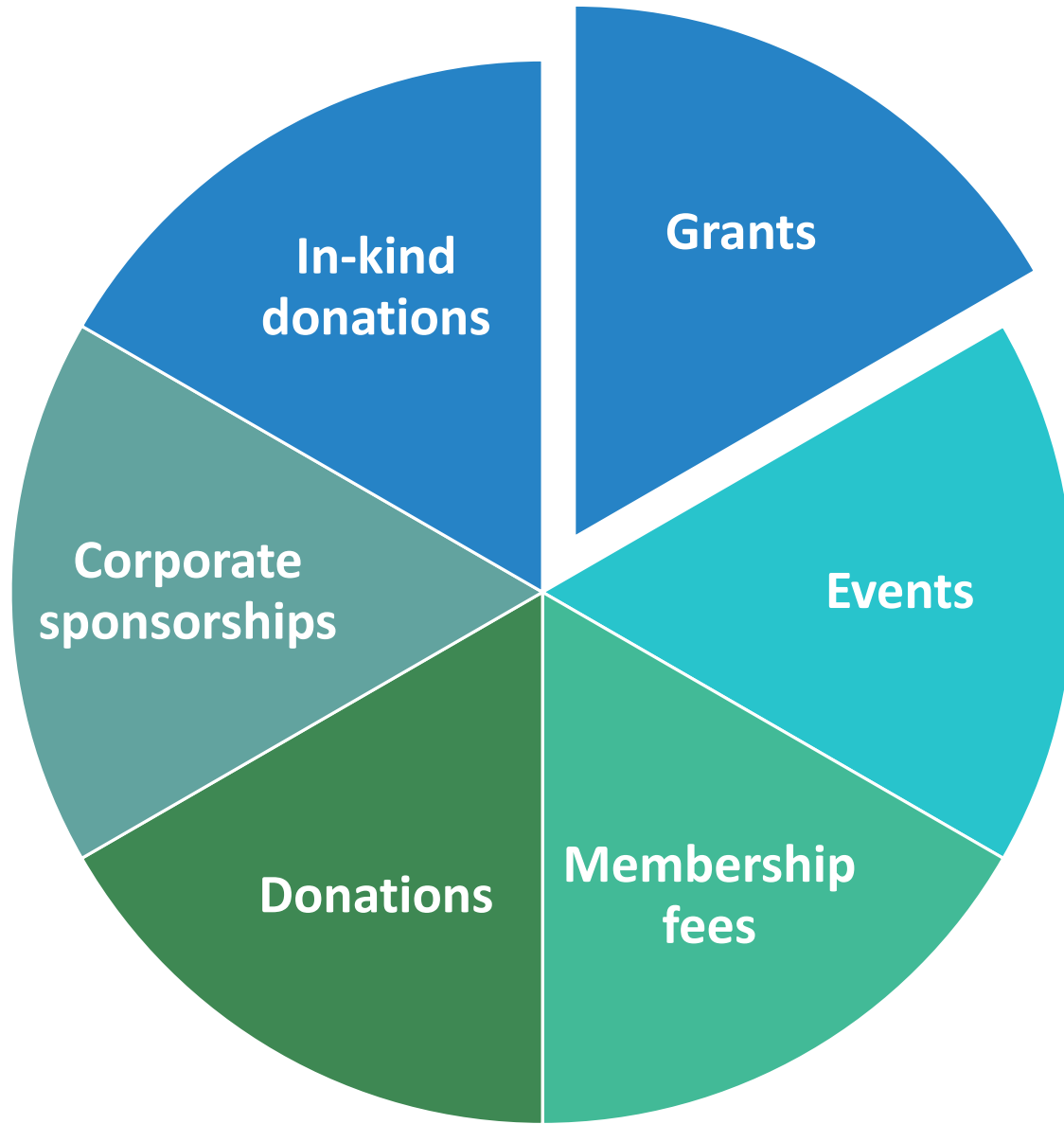
Logic Models & Theory of Change

Google is your friend!

❑Many videos and articles on these to help

❑Not every grants require these – mostly government grants

❑Very helpful in project planning

Logic Models

Provide a graphic depiction of your program's components

Creating one helps stakeholders clearly identify:

- Outcomes
- Inputs
- Activities

WHAT WE DO...

SO THAT THESE OUTCOMES OCCUR:

SHORT TERM   INTERMEDIATE TERM   LONG TERM

Community Engagement
- Education of partners and potential partners
- Collaboration with partners to end homelessness
- Staff participation in and/or leadership of community-wide initiatives

- Community more aware of and knowledgeable about homelessness & related services
- Providers more engaged in assessment & refinement of service network

- Community more engaged & supportive
- Continuum of services improved

- Community committed to ending homelessness
- Continuum of services maximized

Client Based Core Services
- Housing
- Initial intake
- Humane services
- Case Management
- Full assessment
- Referral & linkage to assistance
- Primary Care Medical Clinic (SJMC)
- Meals for residents
- Reunification
- Career Center (DOL)
- SSI & SSDI application assistance
- Transportation
- Computer Lab
- Payee assistance
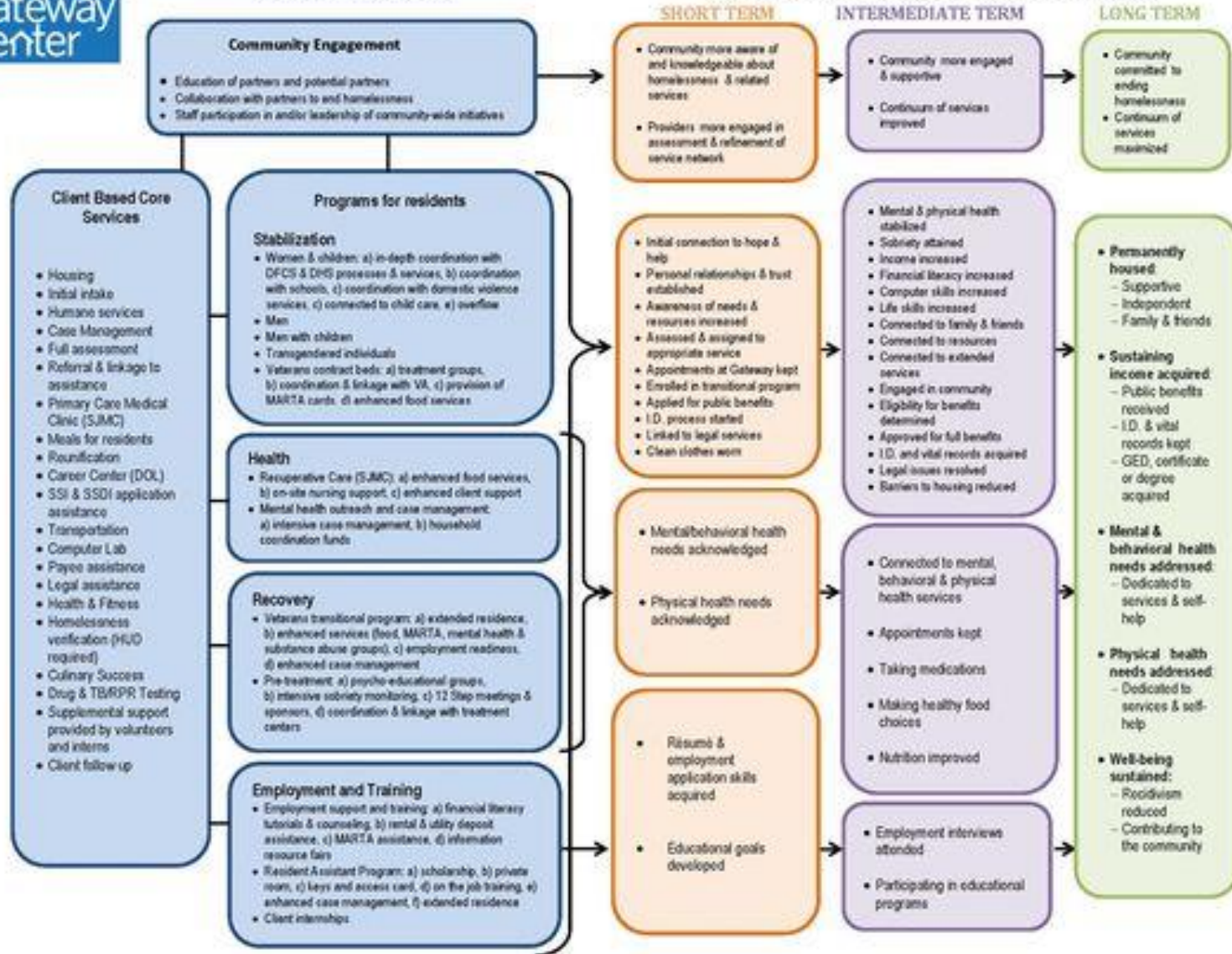- Legal assistance
- Health & Fitness
- Homelessness verification (HUD required)
- Culinary Success
- Drug & TB/RPR Testing
- Supplemental support provided by volunteers and interns
- Client follow up

Programs for residents

Stabilization
- Women & children: a) in-depth coordination with DFCS & DHS processes & services, b) coordination with schools, c) coordination with domestic violence services, c) connected to child care, e) overflow
- Men
- Men with children
- Transgendered individuals
- Veterans contract beds: a) treatment groups, b) coordination & linkage with VA, c) provision of MARTA cards, d) enhanced food services

Health
- Recuperative Care (SJMC): a) enhanced food services, b) on-site nursing support, c) enhanced client support
- Mental health outreach and case management: a) intensive case management, b) household coordination funds

Recovery
- Veterans transitional program: a) extended residence, b) enhanced services (food, MARTA, mental health & substance abuse groups), c) employment readiness, d) enhanced case management
- Pre-treatment: a) psycho-educational groups, b) intensive sobriety monitoring, c) 12 Step meetings & sponsors, d) coordination & linkage with treatment centers

Employment and Training
- Employment support and training: a) financial literacy tutorials & counseling, b) rental & utility deposit assistance, c) MARTA assistance, d) information resource fairs
- Resident Assistant Program: a) scholarship, b) private room, c) keys and access card, d) on the job training, e) enhanced case management, f) extended residence
- Client internships

- Initial connection to hope & help
- Personal relationships & trust established
- Awareness of needs & resources increased
- Assessed & assigned to appropriate service
- Appointments at Gateway kept
- Enrolled in transitional program
- Applied for public benefits
- I.D. process started
- Linked to legal services
- Clean clothes worn

- Mental/behavioral health needs acknowledged
- Physical health needs acknowledged

- Résumé & employment application skills acquired
- Educational goals developed

- Mental & physical health stabilized
- Sobriety attained
- Income increased
- Financial literacy increased
- Computer skills increased
- Life skills increased
- Connected to family & friends
- Connected to resources
- Connected to extended services
- Engaged in community
- Eligibility for benefits determined
- Approved for full benefits
- I.D. and vital records acquired
- Legal issues resolved
- Barriers to housing reduced

- Connected to mental, behavioral & physical health services
- Appointments kept
- Taking medications
- Making healthy food choices
- Nutrition improved

- Employment interviews attended
- Participating in educational programs

- **Permanently housed:**
  - Supportive
  - Independent
  - Family & friends
- **Sustaining income acquired:**
  - Public benefits received
  - I.D. & vital records kept
  - GED, certificate or degree acquired
- **Mental & behavioral health needs addressed:**
  - Dedicated to services & self-help
- **Physical health needs addressed:**
  - Dedicated to services & self-help
- **Well-being sustained:**
  - Recidivism reduced
  - Contributing to the community

*https://www.pinterest.ca/pin/102597697745713655/

Theory of Change

"A theory of change model maps out an organization's path to impact, specifying causal relationships between activities and eventual outcomes. Those outcomes can be in the short, medium, and/or long term."

https://www.sopact.com/perspectives/nonprofit-theory-of-change

SOCIAL JUSTICE GROUP: SUMMARY THEORY OF CHANGE

Ultimate Social Impact: Our region is a healthy, inclusive & sustainable community

Issues We Address	What We Do	What the Community Gets in 5 Yrs.	Long-Term Outcomes
Policies Don't Reflect Needs of All Groups	Leadership Development & Advocacy	More Voices Heard in Community Dialogues	Social Equity
Educational Disparities	Early Childhood & Parent Education, School Reform, Youth Development	Life-long Learning Available to All	Education Equity
Health Disparities	Healthcare Education & Enrollment & Farmers Market	Increased Healthcare Access & Better Nutrition	Health Equity & Community Resilience
Domestic & Community Violence	Violence Prevention & Mental Health Services	Less Violence & More Emotional Resilience	

Eleanor A. Smith & Associates

Target for Change: All Residents in Our Region

https://www.eleanorasmith.com/wp-content/uploads/2015/01/Slide1.jpg

Success and rejection

❑Only 10-40% of grants are approved

❑Grant readiness is important, especially if you are newer or haven't received grants before

❑Think of investing your money – would you take a chance or rather a project that can back up what it says?

❑Read the guidelines again before submitting and proofread!

"Relationships matter"

Funders

❑Get to know your (prospective) funders!

❑Send them new briefs and updates about programs

❑Build trust

Partnerships or collaborations

❑Collaborate with others in the field – no one organization can do it all!

❑MOUs

Tricks - writing

✓Make your outline - turn questions into headings and subheadings

- ✓Bold and change colours of key words = no staring blank page!

✓Use their language

✓Organize responses based on their questions ordering and phrasing ≠ disorganized

✓Use a writing app – e.g., Grammarly, Hemmingway

- ✓ Keep to character counts
  - ◦ Use active voice (give example)
  - ◦ Write meaty, not fluffy
  - ◦ Know your field of work inside and out and policies around your work
  - ◦ Use adjectives appropriately – or use stats instead

- ✓ Stay up to date on language and how to describe populations and everyone and everything else – no slang or casual terms

- ✓ Know the political climate of your region and research related to your mission

- ✓ Think things through **before** you write

- ✓ Starting with bullet points can help

❑ Create an 'old document' and only paste in the good stuff in your working doc – use 'strikethrough' when you've moved the information over

❑Record a voice memo and type it out!

❑Grant reviewers are people, too! Keep the language clear and reader-friendly, don't overexaggerate (prove it!), and keep it professional

Questions?

Who is the Community Foundation
South Okanagan | Similkameen?

About CFSOS

- 30 years of service
- $16 million assets under management
- $6.8 million total in grants
- Over $378,00 in grants for 2022
- Real estate properties
  - Foundry Youth Centre
- Support the South Okanagan Similkameen

Roles at CFSOS

Aaron McRann- *Executive Director*

Sarah Trudeau- *Manager of Grants & Community Initiatives*

Kim English- *Regional Development Officer*

Kelly Helfrich- *Office Administration*

Proud member of:

COMMUNITY
FOUNDATIONS
OF CANADA
all for community.

2022 Grant Timeline

September 10th, 2021	October 15th, 2021	October – November 2021	End of November 2021	Early January 2022
Application cycle begins.	Application cycle ends. All applications must be received by 5pm.	Grants and Community Committees review applications and make recommendations.	Board of Directors approves grant recommendations. Applicants are notified.	Grant payments can be made to successful applicants.

Funding

❑ $378,000
- $200,000 in designated grants
- $178,000 for community grants

Who is eligible?

- Registered charities and Qualified Donees
- Not for profits, service clubs, associations, societies?
  - Intermediary Agreement

![Community Foundation south okanagan | similkameen logo]

Intermediary Agreement

Grants issued through Community Foundation of the South Okanagan Similkameen, can only be made to Registered Charities and Qualified Donees (QD). Alternatively, Non-QDs (NQD) may apply to CFSOS by securing a "fiscal sponsorship" from a QD. A fiscal sponsorship is when a QD agrees to take on a project as its own activity and engages a NQD as an intermediary to carry out the project. This sponsorship should be made between organizations with a mutual alignment of values and missions. If an application with a fiscal sponsor secures a grant, payment will be made to the QD who will be responsible for disbursing funds to the NQD.

For additional information, please visit the Canada Revenue Agency (CRA). What is a Qualified Donee?

The following types of Qualified donees (defined by the CRA) are eligible for funding:

● Registered charities

● Registered Canadian amateur athletic associations

● Registered low-cost housing corporations for the aged

● Registered Municipalities or their housing, cultural and recreational agencies

● First Nations and other registered municipal or public bodies performing a function of government in Canada

Confirmation of an intermediary between a Qualified Donee and Non-Qualified Donee, in compliance with the recommendations of the CRA, is to confirm:

Name of Qualified Donee: _____

Address: _____

Name of contact: _____

Position: _____

Qualified Donee registration #: _____

Has entered into a formal written intermediary agreement with:

Name of Non-Qualified Donee: _____

Address: _____

Name of contact: _____

Position: _____

![Community Foundation south okanagan | similkameen logo]

To take on the following Project: _____, as part of its own activities and in keeping with its charitable purposes, and to engage the Non-Qualified Donee as its intermediary to carry out the Project. The Qualified Donee is responsible to the Funder (Community Foundation of the South Okanagan Similkameen under the Grant Agreement, and this responsibility includes the Non-Qualified Donee's performance in carrying out the Project and any liability that arises as a result, and understands that:

● The grant, if approved, will be made to the Qualified Donee for disbursement to the Non-Qualified Donee,

● The funds are to be used for the Project and that any conditions must be met prior to requesting the funds,

● Any reporting required is completed by the Non-Qualified Donee by the relevant due dates.

Name of President/Chairperson of Qualified Donee: _____

Signature of President/Chairperson of Qualified Donee:_____

Date: _____

Grants will not be awarded to

❑ Establish or add to endowment funds
❑ Establish or add to operating reserves
❑ Projects whose primary purpose is to provide religious activities or beliefs

What do we fund

- 360 degree funder
- Programs and projects that benefit the community
- Programs that fit under CFSOS 4 Key Funding Priorities:
  1. SDG's
  2. Seniors
  3. Projects that Support Indigenous Communities and Reconciliation
  4. Regional Support

Sustainable Development Goals (SDG's)

Seniors

- Ensuring we are supporting senior's focused programs and projects in our area.

Projects that Support Indigenous Communities and Reconciliation

- Prioritizing projects that support Indigenous communities is one step in our commitment to reconciliation. We want to ensure we are funding projects and programs that are Indigenous-led and that support our Indigenous community members.

Regional Support

- Formerly the Smart & Caring, we are supporting local organizations and community partners whose project/programs have a wider regional reach to the communities in the South Okanagan Similkameen, beyond the city limits of Penticton.

Regional Funding

- Regional pool of funds for all of SOS
- Ex: $100,000 in applications from SOS
- All communities must share regional funding

Regional Funding

- In 2021, we received $9,775 in applications from Oliver
- Oliver Community Funds granted $738 in 2021
  - Supported $9,775
    - Desert Sun Counselling
    - Oliver & District Heritage Museum Society

Applying

- One-step online application
- Final Reports

What's New this Year

❑Long form / Short form
  ❑LOI for $2,000 or less (no application)

❑New Funding Priorities

❑ No Vital Signs ⟶ SDG's

❑Multi-year funding

❑Final Report Interview

Check the website!

https://www.cfso.net/grants/apply-for-a-grant/

Evaluating Applications

1. How much does the project touch the CFSOS's 4 key funding priorities: Sustainable Development Goals (SDG's), Seniors, Regional Support, and Reconciliation

2. Community Need: Do you feel this project is needed in the community? Is the project filling a gap in the community?

3. Impact: How much of an impact will CFSOS funding have on the success of the project? Will the project fail without CFSOS funding?

4. Community Involvement and Partnerships: Does the applicant have partnerships with other community organizations/groups to implement the project/program? Is this project/program community led with solid volunteer support?

5. Mission Alignment: Will this project help the organization in delivering its mission**?**

6. Future Planning: Has the applicant planned how the project will be funded in the future?

7. Budget: Does the budget make sense? Reasonable?

CFSOS Grants Programs

- Neighbourhood Small Grants-CFSOS

- Investment Readiness program

- RBC Future Launch Community programs

- Emergency Community Support Funding

- Community Response Fund

- Fund for Gender Equality

- Canadian Healthy Communities Initiative

→ $1 Million in Grants to our region!

How to Prepare

Start a programs and projects wish list
- Roughly plan it out:
  - Budget, new employees, office space, software & equipment needs, why is it needed in the community

- Ensure program/project fits with the funding criteria

How can you collaborate with other orgs

What issues are not being addressed in your community
- What project/program could address it?

Where To Find Other Grants

www.cfso.net/other-funding-sources/

Questions?

Connect with us!

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