2023 Grant Application
Writing Workshop

Introductions, starting with me…

- Kevin Ronaghan: currently managing Grants & Community Initiatives at the Community Foundation of the South Okanagan Similkameen

- Previous grantmaking experience with Vancity Savings Credit Union and Vancouver Foundation (Centre for Not-for-Profit Sustainability)

- Naramatian since 2016

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An introduction to your Community Foundation

- 30 + years of service

- Nearly $16 million in assets under management

- $8.6 million in grant funds disbursed over its history (that's more than 2400 grants)

- Supports the entire South Okanagan Similkameen region

- Home - Community Foundation of the South Okanagan Similkameen (cfso.net)

Credits

- Some content for this presentation is adapted from our 2022 grant writing workshop, which was developed by:
  - **Kim McPhedran** (www.writtenbykim.com)
  - **Sarah Trudeau** (Manager, Grants & Community Initiatives, CFSOS)

The reality of grant programs

- They are generally <u>very</u> competitive.

- The total dollar value of requests often far outweighs the funds available to grant.

No two funders are the same

- Each funder will have their unique requirements, processes and approaches to grantmaking.

- Understanding your funder(s) is <u>important</u>.

Getting to know your funder(s)

Before putting effort into a grant proposal:

- Do your research. Learn about the funder's history, their goals/priorities and their past grant allocations.

- Review their eligibility guidelines, application form and supporting documents carefully.

- Make the effort to talk to their grant staff and ask questions. Be sure you know what they're looking for and if your organization/project/program is a good fit.

Where can I find information on available grant programs?

- Here's a place to start:

[Other Funding Sources - Community Foundation of the South Okanagan Similkameen (cfso.net)](cfso.net)

The task of grant staff/grant review committees

- They need to read and evaluate <u>all</u> eligible applications received for a given grant program.

- For our Foundation grant program, that can mean 40 – 60 applications!

- You want your application to stand out from the crowd (in the best possible way!)

- A well written application can have a positive impact.

What makes a good grant application?
(not an exhaustive list…)

- It's complete and adheres to the funder's application instructions and guidelines.

- It matches well with the funder's eligibility criteria and funding goals/priorities.

- It's clearly written and straightforward to understand.

- It outlines a demonstrated need, and an achievable and measurable plan to address that need.

- The project, program or activity fits well with your organization's mission and purpose.

Good grant proposals take time

You'll need time for:

- Researching funding opportunities

- Contacting funders and asking questions

- Gathering your information

- Drafting, editing, re-writes

- Proofreading before submission

Don't wait until the last minute! Give yourself the time you need to create the best possible proposal.

Time saving strategy: "Grant Proposal Tool Kit"

Consider building a central electronic file for your proposal writing!

Include typically requested information you can adapt for your applications. Some ideas:

- A description of your organization and its history and achievements

- Your mission and vision

- Your organization's registration details (CRA or Society number)

- A list of current Board members and their roles

- Up to date financials

More tool kit items...

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

- Recent data that shows the need for your programming in your community

- Electronic copies of supporting documents: letters of reference, brochures, annual reports, media coverage, etc.

Revisit your toolkit often to keep the information current!

Consider your audience

- Remember that the average grant reviewer will likely not share your depth of knowledge of your field or issue.

- Use plain language. Avoid using your field's "jargon" whenever you can (and explain it when you can't).

- Tip: have someone unfamiliar with your organization's work read your application and offer feedback.

Other writing tips…

- Keep it simple. A clear and reader-friendly style is best.

- Tighten your writing. Avoid word-padding to simply meet character limits. Often less can be more.

- Be direct. Don't "bury the lead!"

- Use an active voice in your writing wherever possible: Use the active voice – The Writing Center – UW–Madison (wisc.edu)

- Use the funder's language where appropriate.

More writing tips!

- Do you speak more eloquently about your work than you can write about it? Try using a speech to text program to record your draft application.

- Is writing not your strong suit? Consider using an online tool like *Grammarly* or *Hemingway* to help you.

Some questions to ask yourself as you craft your application

- Have I clearly and accurately described what we're trying to do, how we'll do it, and why?

- Have I made a strong case for the need for the project? (Include supportive data where you can.)

- Is my project plan achievable? (Think about its scope and timeframes, and your organization's capacity.)

- Have I outlined how we will measure and evaluate our work?

- Is my budget clear and reasonable?

Expressing the need

- There are many important funding needs out there; your goal is to convince the funder that yours is one that is worth supporting.

- Data (and <u>stories</u>!) can help bolster your case.

- Use local and regional research to support your argument. (Hint: the 2023 Vital Signs report can be found here: <u>Vital Signs Community Report - Community Foundation of the South Okanagan Similkameen (cfso.net)</u>

Your proposal's budget

- Your budget's level of detail should meet the funder's requirements; use the funder's budget template if one is provided.

- Expenses should match with the activities outlined in the project or program description.

- Don't shortchange yourself with respect to overhead, staffing, and program costs.
    - BUT: be sure to pay attention to some funders' cost limits (particularly with overhead)

- 6 tips for writing a solid grant budget proposal | Imagine Canada

A few words on measurement

- A complex field!

- Outputs are only one piece of the measurement puzzle

- The importance of measuring <u>impact</u> is growing (i.e., how you're "moving the needle" on your issue)

- There's lots of information out there on measurement; for example:
  - <u>Five essential practices of good impact measurement – Purppl</u>
  - NonprofitReady: <u>How to Measure the Impact of Your Nonprofit Programs</u>

Food for thought:

- Think of a grant as an investment by the funder in your organization (and your community!)

- If you were considering putting your own money into the project, would your grant application encourage you to invest?

After the decision

- **If you're successful**: Congratulations! Take some time to reflect on what made your application great so you can replicate those approaches with the next one. (Hint: ask grant program staff for feedback)

- **If you're unsuccessful**: Be sure to ask for feedback from grant staff. It might initially be a "high demand/tough decision" message. If that's the case, try asking them for additional feedback specific to your application.

New to applying for grants?

- Be sure your organization is "grant ready" and has the capacity to effectively manage, deliver and report on its funded project(s).

- Consider starting with smaller funding requests.

- Foster a positive relationship with the funder, and work to gain their confidence in you as a grantee.

Alternatives to written applications

- Some grantmakers are becoming open to receiving applications in different formats: oral, video, etc.

- It's worth checking with grant staff to see if those or other options are available to you, particularly if producing a written application is a barrier to your organization's participation in their grant program.

Grants are just one tool

- Pursuing grants is just one of several tools your organization can use to find financial support for its work.

- Creating a <u>diversified fundraising strategy</u> is a valuable organizational development goal.

- Fun fact: the Community Foundation will consider grant proposals for organizational development activities!

Additional learning

Alberta Community Development Office: Grant Writing 101 Video Series – YouTube

CFSOS Foundation Grants

- Our annual grant cycle typically begins in August of each year.

- Here's the link to more information:

Foundation Grants - Community Foundation of the South Okanagan Similkameen (cfso.net)

Thank you!