

# YOUR Grant Proposal “Process”



- **STEP 1: Research**
  - Search “funding for” and project’s key words (e.g., funding for STEM in Dallas) [**“Resource List” later in slides**]
  - Narrow down to those with giving priorities and policies that match your needs and organization
  - Reach out to your network and ask if anyone has personally connections
  - Rank funder prospects, stay focused on the top, and discuss with your District Office
- **STEP 2: Inquire, Approach, Involve**
  - Reach out to top prospects (e.g., phone call, email, meet at an event, submit online Letter of Inquiry (LOI))
  - Follow-up on initial contact
  - Invite to your classroom, see the project in action, engage with you and students
  - Invite to campus events
- **STEP 3: Develop Request (Executive Summary and Full Version)**
  - Format usually set by funder – Cover Letter/Email, Org History/Vision/Mission, Statement of Need (with citation to supporting research), Target Population, Geographic, Timeline, Project’s Theory of Change/Goals/Methods, Measurable Objectives/Expected Outcomes, Evaluation, Personnel, Budget (Revenue & Expenses), Funding Sustainability Plan (if needed)
  - Think about attachments – letters of support, example project materials, student testimonials
  - Be mindful of timing
  - Recruit at least 2 sets of eyes to review for you
- **STEP 4: Solicit (in-person if can, email/online)**
- **STEP 5: Follow-up (confirm receipt, answer questions, close the ask)**
- **STEP 6: Report On-Time and Consistently Show Gratitude**
- **STEP 7: Repeat (if can)**

# Funders' Grant Review "Process"



- **STEP 1: Initial contact with applicant**
- **STEP 2: Decide if applicant "eligible," project aligned, and funding available (pool of funding often decided during prior fiscal year)**
- **STEP 3: If eligible and funds available, extend invitation to applicant to submit LOI**
- **STEP 4: Review LOI, decide if project aligns with priorities and policies, and notify applicant**
- **STEP 5: Notify applicant if not able to move them forward OR request full proposal**
- **STEP 6: If full proposal submitted, grants officer reviews, asks questions, prepares summary and presents that to Board of Directors who then decide whether to fully or partially fund**
  - **Typical questions from board members:** "Is the project reasonable and doable?" "Does the project involve partnerships or collaborations?" "Is the budget sufficient to perform the project's task?" "Who are all funders to project?"
  - **Why proposals are denied:** Doesn't meet funder priorities; org is outside funder's geographic area; did not follow prescribed format; poorly written and/or lacks clarity; request not within funding range; org unknown to funder
- **STEP 7: If funding approved, notify applicant and send them grant agreement incorporating proposal and confirming timing of fund distributions and deadlines/format for reports**
- **STEP 8: Follow-up with applicant after each fund distributions and send reminders when reporting deadlines approaching**
- **STEP 9: Toward end of term, expect applicant to inquire about renewal of grant or submission of new proposal**



- **Corporations (local, regional, statewide, national)**
  - **Types:** banks/credit unions, utilities, retail stores, restaurants, service providers
  - **Motivations:** good citizenship, exec leadership interest, location, cause-related marketing, employee interests
  - **Strategies for building relationships:**
    - Corporation's owners/executives/employees are alumni and/or serve on your board or advisory groups
    - Inquire about "in-kind support" for your org & then prominently recognize corporate contribution
    - Invite to be a sponsor of the org (e.g., Lecture Series - provide speakers/refreshments/space/names for invite list)
- **Individuals and Estates**
  - **Motivations:** personal or spousal interests/concerns, community service
  - **Strategies for building relationships:**
    - Same as strategies for Corporations
- **Foundations**
  - **Types:** private, company-sponsored, community
  - **Motivations:** community support, sociopolitical concerns, historical roles (e.g. founders' philanthropic interests), seed money for new projects, tax advantages
  - **Strategies for building relationships:**
    - Confirm alignment with foundation mission/vision/goals & analyze funding guidelines
    - Founders and/or foundation's staff serve on your board or an advisory group
    - Follow "Grant Proposing 'Process'" shown later in slides
- **Grant-making Agencies (local, regional, state, federal)**
  - **Motivations:** addressing priority social needs
  - **Strategy for engagement:** respond to published Requests for Proposals (RFP)

# “Tips” for Successful Grant Proposals



In order to create a well-written and truly aligned proposal:

## 1. Go for Training

- 100% worth your time investment ([case.org](http://case.org), [foundationcenter.org](http://foundationcenter.org))

## 2. Do Your Prep Work

- BEFORE you write anything – brainstorm and plan your Statement of Need, Target Population, Geographic, Timeline, Theory of Change/Goals/Methods (*be realistic*), Objectives/Expected Outcomes, Personnel, Budget (Revenue & Expenses), Funding Sustainability Plan (if needed)
- Make sure you comply with your District’s Rules (if any)

## 3. Incorporate Beneficiary/Partner Voice(s)

- Consider forming advisory groups for your projects that include local leaders (e.g., government, business, nonprofits), experts in focus area, your relevant peers, etc.
- Include “beneficiaries” quotes in proposal (e.g., from students, partners/collaborators, current funders, board/advisory group members)

## 4. Follow Funders’ Instructions EXACTLY

- Format of proposal, budget, and any attachments

## 5. Seek Feedback

- Share draft proposal packet with at least 2 sets of “external” eyes for constructive review/edits
- Allow time for you to receive/incorporate those edits before your filing deadline



# Documents to Keep on Hand



- Your organization's "resume"
  - Vision and mission statements
  - Short description of org's services
  - Founding date & major historical milestones
  - Name/contact info for CEO and board president/chair
  - Total annual budget (last and current years)
  - Sources of funding, including total amount provided by source
  - Number of paid staff (full- vs part-time) and number of volunteers
- List of board members with affiliations
- A one-page bio for project's key staff and volunteers
- Org's tax exempt document (IRS 501c3 letter)
- Current organizational budget
- Current financial statement
- Last two fiscal years' audited financial statements
- Org's anti-discrimination policy
- Letters of support from partners/collaborators, gov't officials, students, current funders
- Organizational chart

# Your “Living” Resource List



- **Subscribe to e-newsletters/RFP Bulletins**

- Foundations <http://foundationcenter.org/newsletters>
- Federal Agencies <http://www.grants.gov/web/grants/manage-subscriptions.html>
- Texas Agencies (Electronic State Business Daily)  
[https://service.govdelivery.com/accounts/TXCOMPT/subscriber/new?topic\\_id=TXCOMPT\\_80](https://service.govdelivery.com/accounts/TXCOMPT/subscriber/new?topic_id=TXCOMPT_80)

- **Review your peer/aspirant organization’s Annual Reports**

- **Checkout <http://www.pamelasgrantwritingblog.com/>**

- **Read *The Ultimate Insider's Guide to Winning Foundation Grants: A Foundation CEO Reveals the Secrets You Need to Know* by Martin Teitel (Emerson & Church, 2012)**

- **Visit with grant staff** from your District or Higher Ed Partner



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*Thank you for all that you do!*