

# Take Nothing for Granted

How thorough research, planning and attention to detail can mean the difference between your proposal's approval and rejection.

By Jacklyn P. Boice



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Ask any business student what the No. 1 rule of economics is and most will reply, “There is no such thing as a free lunch.” Any grantmaker can tell you the same thing. Perhaps at the height of the heady ’90s, seeking funding from some foundations was almost like going to the nearest Automated Teller Machine and waiting for the cash to spit out. No more. Now, more than ever, grantseekers must get foundation support the old-fashioned way: they have to earn it. It is not easy. In addition to being tenacious, organized and dedicated, grantseekers must be good communicators, planners and—most of all—superb sleuths.

## Research, and More Research

According to published reports, in 2000 there were more than 1,684 active foundations in Canada and 56,582 in the United States—with 6,381 created in the previous year alone. In its *Foundation Growth and Giving Estimates: 2002 Preview*, The Foundation Center in New York City noted that there are now nearly 62,000 grantmaking foundations in the United States.

The growth in the number of foun-

dations is both good news and bad news for grantseekers. The good news is that the odds are greater that you will find someone who is interested in your cause, says Karen Eber Davis, president of Karen Eber Davis Consulting in Sarasota, Fla. The bad news is that just because there are more foundations does not mean that there are more interested in your particular

of interest and geographic limitations do not match, says Cheryl A. Clarke, a grantwriter in Mill Valley, Calif., and author of *Storytelling for Grantseekers: The Guide to Creative Nonprofit Fundraising*. In fact, a poor fit is one of the main reasons for most proposal rejections. “People make the mistake of wanting to be missionaries in the field. They are passionate about their

what a foundation actually funds. Just because a foundation says it gives to environmental causes, for example, does not mean that it gives to all of them. “Take the time to do the research, read the foundation’s annual report, see what they have funded, what interests them and what your organization does that meets their criteria. Understand the values and interests of the foundation and the fit with your organization and what you are doing,” Clarke advises. Then look at the grant range. “If you are a small grassroots organization, don’t apply to a large national funder. At the same time, if you’re initiating a large capital campaign, don’t go to a small foundation that makes small grants.”

### Grantseekers should see the entire proposal process as building a relationship with a foundation—whether their proposal is accepted or rejected, the experts say.

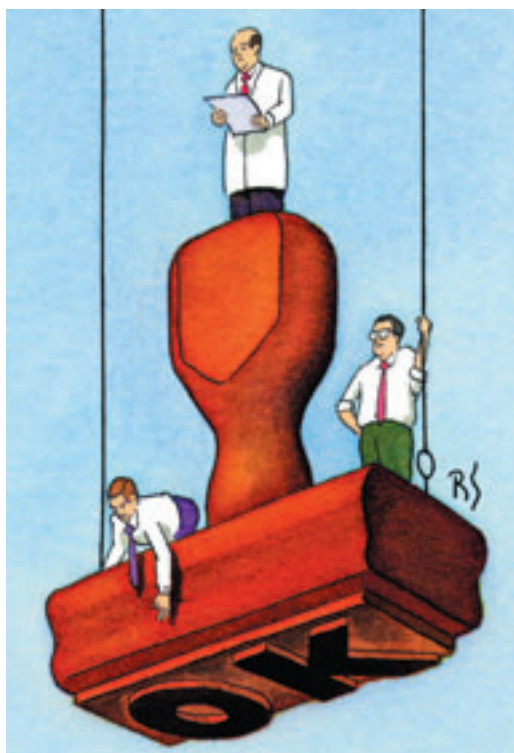
cause or program. Consequently, grantseekers must do a lot more research and go through considerable more data on foundations in order to find out exactly what they fund. In fact, a proposal’s success is probably based on 80 percent good research and 20 percent good writing.

Luckily, grantseekers now have easy, immediate access to information on foundations, with printed and online reports and statistics at their fingertips. Yet the abundant data can be overwhelming. Where do you start? It boils down to finding that perfect match and understanding the dynamics of what the foundation wants to fund, says Diane Gedeon-Martin, president of The Write Source in Glastonbury, Conn. “Don’t be naïve. You can’t just write something down and mail it in,” she explains. “You have to spend the time doing the homework. Identifying the right fit is so important before you submit anything.”

That “right fit,” the experts agree, starts with matching geographic focus, giving limitations and fields of interest.

#### A Good Fit

Your initial examination of a particular funder can be very brief if the fields



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cause and believe everyone should feel the same,” she explains. “But if you are in the arts, don’t try to get a health-care funder to give you money. If a foundation has never given to a particular sector, there is a reason.”

Then look over tax forms: In the United States, pull the 990 (check GuideStar at [www.guidestar.com](http://www.guidestar.com)).

In Canada, you can find a foundation’s T3010 on the Canada Customs and Revenue Agency website ([www.ccrca-adrc.gc.ca/tax/charities](http://www.ccrca-adrc.gc.ca/tax/charities)) and see

It is critical that proposal writers make it easy for funders to see how their projects are compatible with a foundation’s mission and areas of interest. After all, in 2002 there were approximately 850,000 charities recognized by the Internal Revenue Service in the United States—more than double the 375,000 charities in 1986. In Canada, there are now at least 79,000 registered charities, with about 4,000 new applications coming in every year. With so many proposals to read each year, funders must clearly understand the purpose of the project and how it relates to the interests of the foundation. If not, they will certainly reject an application, notes Debbie Bean, community grants coordinator with The Winnipeg Foundation in Manitoba, Canada. Previously, she was an executive director for a non-profit in Winnipeg, and thus has experience as both a grantwriter and grantmaker.

So what is the best way to properly address all of a foundation’s needed criteria? Have a plan. From a brief history of your organization and detailed description of the project, to financial information and qualifications of key staff, you need a plan in place to clearly state your case. Many grant writers make the mistake of having a lot of information in the proposal about the need, Gedeon-Martin says,

# Make the Right Impression

How do you write a proposal that makes the funder feel it is worthwhile to keep on reading—and ultimately approve your request? Here are some tips from the experts interviewed for this story:

## 1. Developing the proposal idea

**DO:** Take the time to plan—it is the key to a successful proposal.

**DON'T:** Skip this process.

## 2. Identifying the right funder

**DO:** Research everything you can on the grantmaker prior to ever making personal contact.

**DO:** Personally contact the grantmaker to introduce your organization.

**DO:** Keep in mind that you are working to satisfy the mission of the grantmaker.

**DON'T:** Submit a proposal until you have fully researched the grantmaker.

**DON'T:** Expect funders to be moved because you need money (nearly everyone can use more).

## 3. Letter of intent or inquiry

**DO:** Follow the guidelines of the grantmaker.

**DO:** Focus on the project by talking about the need and how your organization will solve the problem.

**DON'T:** Speak only about the money needed.

## 4. Letter format proposal

**DO:** Follow the guidelines of the grantmaker.

**DO:** Present your case for support as you would in a full proposal.

**DON'T:** Overwhelm the grantmaker with attachments other than those requested—in the order so requested.

## 5. Full proposal

### **Writing:**

**DO:** Follow the guidelines of the grantmaker.

**DO:** Be thorough, with up-to-date information.

**DO:** Use one writer and many reviewers.

**DO:** Write with a clear, active voice—use an energetic, positive, colorful writing style.

**DO:** Correct all typos and follow the rules of grammar.

**DON'T:** Use flowery prose to try to compensate for a lack of information.

### **Content:**

**DO:** Think like the reviewer when writing the proposal.

**DO:** Identify the “match” or “fit” with the particular grantmaker.

**DO:** Answer the six basic questions—who, what, why, where, when and how.

**DO:** Answer all the questions, even if the funder seems to ask the same things repeatedly.

**DO:** Keep the history and mission section of your proposal brief.

**DON'T:** Confuse the funder about what you want or what you plan to do.

**DON'T:** List three or four projects and then ask the funder to select one to support.

**DON'T:** Assume the reader knows the field as well as you do and leave out essential information about the project.

### **Request:**

**DO:** Use budget notes to explain specific line items, especially if a line item represents 5 percent or more of the total budget.

**DO:** Provide a plan for life after the grant.

**DON'T:** Write only for the money.

**DON'T:** Inflate your budget and ask for double the amount you really need.

### **Before mailing the proposal:**

**DO:** Set your deadline one week earlier than the funder's.

**DON'T:** Write shotgun proposals—sending the same proposal out to 10 grantmakers hoping that one will be awarded.

**DON'T:** Forget to address the letter to a specific person at the foundation.

**DON'T:** Forget to put the name and telephone number of the contact person at your organization.

**DON'T:** Forget to make a copy of the application for your files with all your notes.

## 6. Grants management follow-up

**DON'T:** Forget to send the progress reports on time!

### 7a. Learning that your proposal was rejected

**DO:** Contact the grantmaker to learn why your proposal didn't get funded and how you can improve the proposal for future submissions—to that foundation and other funders.

**DON'T:** Get defensive.

### 7b. Learning that your proposal was approved

**DO:** Send the thank-you letter before cashing the check!

**DO:** After the decision, ask the funder, “What was the best part of my request? What could I have done to strengthen it?” Then reward yourself with a hot fudge sundae for your courage.

### Resources

If you want to research a particular foundation, or brush up on your grant writing skills, there are several associations and organizations that have considerable resources available:

Association of Fundraising Professionals (AFP)  
Resource Center  
800-666-3863  
[www.afpnet.org](http://www.afpnet.org)

Canadian Centre for Philanthropy  
425 University Avenue  
Suite 700  
Toronto, Ontario M5G 1T6  
416-597-2293; 800-263-1178  
[www.ccp.ca](http://www.ccp.ca)

The Center on Philanthropy at Indiana University  
550 W. North St., Suite 301  
Indianapolis, IN 46202-3272  
317-274-4200  
[www.philanthropy.iupui.edu](http://www.philanthropy.iupui.edu)

Community Foundations of Canada  
75 Albert Street, Suite 301  
Ottawa, Ontario K1P 5E7  
613-236-2664  
[www.community-fdn.ca](http://www.community-fdn.ca)

Council on Foundations  
1828 L Street, NW  
Washington, DC 20036  
202-466-6512  
[www.cof.org](http://www.cof.org)

The Foundation Center  
79 Fifth Avenue  
New York, NY 10003-3076  
212-620-4230  
[www.fdncenter.org](http://www.fdncenter.org)

GuideStar  
427 Scotland Street  
Williamsburg, VA 23185  
757-229-4631  
[www.guidestar.com](http://www.guidestar.com)

but not enough information on the project itself. “They forget to go through that process of explaining how everything will work and fit. The planning stage is so important, but it is the easiest to resist.”

### A Workable Plan

The fundraising plan is a relatively new aspect to proposals. During the '90s, if people had a good reason to start a nonprofit, they would most likely receive needed funding. However, after about 10 months or so, the organization's board and executive director would realize that the charity could not survive without another influx of cash. “Second and third grants are much harder to get,” Davis explains. “It's almost like an addiction—those first grants are good, but they don't last.”

It's about helping nonprofits become more self-sufficient, Bean adds. “If you just continue to fund projects, there is a dependency. You have to deal with sustainability issues because foundations are not sustaining builders. How will you continue after the grant is approved? Expecting one funder for 100 percent of your nonprofit's needs is unrealistic. You have to diversify your funding base. Look for other sources of revenue, even something in kind. This has been a significant change in the past 10 years.”

Gedeon-Martin agrees, recalling the saying, “If you buy a man a fish, you feed him for a day. If you teach a man to fish, you feed him for a lifetime.” She reminds grantseekers that it is “very tough out there” and there are no guarantees in fundraising. However, you have to wean yourself from foundation money. “You must show where else you will get funding,” she says. “Grantmakers are saying, ‘We won't give unless we can see you will have the funds to continue this program in the future.’”

Thorough research and a workable plan to sustain your program into the foreseeable future are only a part of successful grantsmanship, however. Grantseekers need a host of other skills to produce winning proposals.

### Have What It Takes

A good proposal is more than a good idea written in good English. In addition to being more sophisticated in their research, writing and planning, successful grant writers must have what it takes to impress funders:

#### 1. Clear communications.

“It helps to be a good writer, but you can learn to be better,” Clarke explains. “It's more important to be a good communicator and to pay attention to detail. If you're a business writer or a technical writer, this is transferable.”

Another misconception many grantseekers have is that the proposal needs to be written with “fancy, big words” and be professionally laid out. Instead, just follow the guidelines and write in plain English, Bean says. Also, people sometimes feel reluctant to “toot their own horn,” but it is important to do that in a proposal.

#### 2. Organization.

Research requires more time than most grantseekers realize, so they should not wait until the last minute to start preparing and writing a proposal. “It is much better to wait until the following year and then get in on the cycle ahead of the game,” Davis advises.

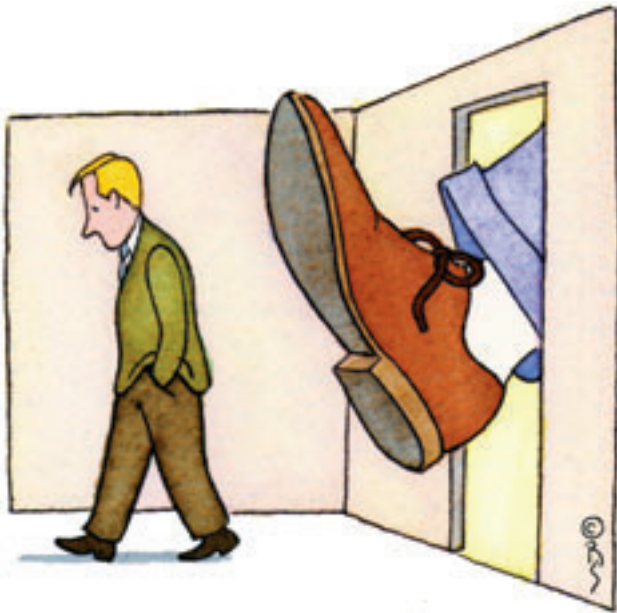
#### 3. Honesty.

Be straightforward, Bean says. Tell the honest story in your proposal and never write anything that your charitable organization cannot deliver.

Even if your organization had a problem, let the foundation know and then go from there, Davis advises. “Admit it and then show how you learned from it. Describe the healing in a positive way; tell it in a way that shows you have moved beyond it.”

#### 4. Vision.

According to Davis, vision enables you to see the future, to visualize it and then write from that. “Imagine the future in detail,” she advises. “Make the information rich. For example, if you are describing your program, don't just go from point A to point B. Paint a picture



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of what you will do with those dollars. Let the funder ‘see’ the program.”

#### 5. A good story.

Often the prospect of writing a grant proposal is greeted with as much enthusiasm as a visit to the dentist for a root canal, Clarke admits. Instead, your proposal should inform and engage. Why do your constituents need your service? What do you want to accomplish? The proposal should be fun, positive and an enjoyable experience. “Many grantwriters feel that a proposal has to be technical and boring,” she says. “However, if you are bored writing it, just imagine what the person who reads it will feel.”

#### 6. Resiliency.

Tenacity is an essential quality for any grantseeker. “You have to put in a lot of time in order to get something at the end,” Gedeon-Martin points out.

with other community service partners,” she says. “Meetings are so informative and make for good grant-making.”

If your proposal is rejected, it does not necessarily mean the end of your relationship with a foundation. As Bean advises, do not take the rejection personally. “It’s not a reflection on you or your organization. There are simply more requests than a foundation can satisfy, and the board does its best to fund broadly.” Contact the grantmaker and find out why your proposal was not approved. If the fit was not right, perhaps the funder can recommend other foundations or other sources of funding for your project. Or, ask how you can improve your proposal for future submissions. You have nothing to lose by keeping the relationship alive, and everything to gain—especially when the economic winds shift again for the better. ☺

“Remember that it might take six months to a year before you see any money.”

Grantseekers should see the entire proposal process as building a relationship with a foundation—whether their proposal is accepted or rejected, the experts say. Whenever possible, have a telephone conversation or meet personally with the foundation’s program officer. Foundations also try to do the same. Part of Bean’s job at The Winnipeg Foundation involves going out and visiting organizations requesting funding. “I see who they are, how long they have served people, and I learn about their reputation by talking

## Publications

From *Grant Writing for Dummies* by Beverly A. Browning (John Wiley & Sons, 2001), to *The Foundation Center’s Guide to Proposal Writing* by Jane C. Geever (also available in Spanish, *Guía para escribir propuestas*), there are almost limitless books to help in the proposal writing process.

The following are available at the AFP Online Bookstore ([www.afpnet.org/afp\\_marketplace](http://www.afpnet.org/afp_marketplace)):

*Corporate and Foundation Fund Raising: A Complete Guide from the Inside* (Aspen’s Fund Raising Series for the 21st Century) by Eugene A. Scanlan (Jones & Bartlett, 1998), paperback.

*Demystifying Grant Seeking: What You REALLY Need to Do to Get Grants* by Larissa Golden Brown and Martin John Brown (Jossey-Bass, 2001), cloth.

*Grant Seeker’s Budget Toolkit* by James Aaron Quick and Cheryl Carter New (John Wiley & Sons, 2001), paperback.

*Grant Seeker’s Toolkit: A Comprehensive Guide to Finding Funding* (includes disk) by Cheryl Carter New and James Aaron Quick (John Wiley & Sons, 1998), paperback.

*Grassroots Grants: An Activist’s Guide to Proposal Writing* by Andy Robinson (Jossey-Bass, 1996), paperback.

*The Insider’s Guide to Grantmaking: How Foundations Find, Fund, and Manage Effective Programs* by Joel J. Orosz (Jossey-Bass, 2000), hardcover.

*Winning Grants: Step by Step* by Mim Carlson, The Alliance for Nonprofit Management (Jossey-Bass, 2002), paperback.