Helping you define and grow your niche, locally and internationally

Fundraising 102 - Templates & Resources for Efficiency

Be wary of grant templates because *every* grant *must* be personalized to the funder's particular interests and language; a grant functions as a template *only* in the sense that it collects most of the necessary information and tells the organization's/project's story; parts of it may then form the base of another application, but *not* the final draft – again, every grant MUST be personalized to the funder.

Grant and other fundraising library - have these documents centralized in one e-folder for quick grant/pitch preparation:

- 501c3, aka IRS tax-exempt, letter.
- List of Board of Directors & Senior staff.
- Latest completed annual financials (note the dates of your fiscal year).
- Current annual budget.
- The latest 990 tax filing form (since 2008, organizations with budgets <$50k must also file a 990-N).
- If annual budget is > $250k latest audit as well.
- Strategic plan, if one exists; if not, then a brainstorming session 1-2 pager on what the organization wants to accomplish, or how it wants to grow in the next 3 years, and how. You won't share this, but will excerpt from it.
- Annual report if one exists; if not, a list of successes in last few years and the financial statements.
- Testimonials and letters of support for the project in this community/ies – from clients, partners, suppliers, etc – representing all parts of the project network.
- Press releases or videos about your program/s.
- List of all programs and short overview of each.
- Statistics about your program/s – what services do you provide? how many clients served per year? How many clients served by each service? How many served since founding? What have clients gone on to do?
- If you have multiple program sites, do you have a map of where your sites are?

Only send the attachments the funder specifically asks for – nothing additional, it will just annoy them. Have all of the above prepared and periodically updated, so you can provide them if/when asked. Note this list is not exhaustive, but includes the main documents most frequently requested.

Other Efficiency Resources

Create your target list of institutional funders (foundations and corporations) - there are several ways to do that. [1]

Take advantage of the (almost) free professional resources that exist, including your Board, and other professional development NPOs - Foundation Center, Forefront (formerly known as Donors Forum), Taproot Foundation, Arts & Business Council and others.

Heads up - know what to expect and be prepared. When/after we win a grant, the grantors typically want regular progress reports (of varying levels of detail, but rarely over 3 pages, unless it's a government grant) – typically quarterly, but anywhere from 1-6 months between reports. [2]

The rule of thumb is that only 1 in 4 grants are accepted. To have a good chance, you must clearly illustrate
- your story (what has been done, what will be done in project, and what it will enable for the clients),

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[1] Ask us for a copy of Fundraising 101 - Finding Corporate and Foundation Grant Funding, or download it here
[2] Ask us for a copy of Reporting 101, or download it from http://glocalconsultantsgroup.com/glocal-briefs/ (same link as above)

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Glocal Briefs™

- the non-profit and foundation mission match,
- your strategic plan or vision, and
- how your project will help the foundation further their own mission (*your story in their words*; they want a "return on their social investment").
- relationships - with other organizations in the community, with members of their Board, public-private partnerships that make you more plugged in and efficient.

Writing the grant proposal - every grant is slightly different, most are very specific, all ask for a variation of the below (+ a few of their own additional, specific interests)- - prep brief explanations for each item
-   Organization's history (founding, mission, any org changes, development strategy)
-   Project history (this would be the expansion to a particular city or geography, or to a particular population, or into a related service, the challenges and successes, recognizable people who went through the program).
-   Request amount
-   What will the grant monies be used for? (Organizations plans or future; 3-5 year goals and forecasted budget, challenges)
-   How will we measure success? and who will ensure we are meeting the metrics? (Project Mgr, CFO, QA Director, whomever)
-   Project budget (and sometimes Agency budget)
-   Project (and Agency) staffing
-   Contact person & related contact info (each City ED, or each program director, or the CDO or CEO)
-   Basic documentation – IRS tax exempt letter; recent audited financial statements or annual report; some states such as Illinois have a "Letter of Good Standing" obtained f/the Secretary of State; charter & by-laws; list of Board Members; list of other organizations/individuals who fund your 501c3.

Sometimes,
-   how will the knowledge gained from this project be shared with others? Or how will the successes of this project be built upon or replicated?
-   list of company's employees who volunteer with your organization.
-   List of partners (community based orgs, faith based orgs, government entities, other NGOs or associations, etc, etc) and how you work together.

Grant proposals are very specific - bring both your adult self and your 5th grade self to the table. Your 5th grade self will answer every question exactly as it is asked, and your adult self will see why they are asking it and will provide the data to back up your assertions.

Get all the stories succinct, the facts correct, and the anecdotes clear and compelling. Provide the financial statements and a reasonable budget for the project. [3]

If you would like help preparing your resources, finding funding prospects, writing grants, or other Development and Management issues, contact us at info@glocalconsultantsgroup.com or +1-773-218-8270 / +1-347-480-8679.

Glocal Briefs™ are pragmatic, five minute intros to diverse management and leadership topics. Check out our others in the website's resources section, or click here.

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[3] Ask us for copies of "Financial Management 101 for Non Profits" and "Fundraising 101 - Finding Corporate & Foundation Grants Funding"