Getting Started with Grant Writing

September 30, 2021
Introductions & Agenda

Susan Linn and EFNE

About You

TODAY

What is a Grant

Seeking Opportunities

Grant Writing Basics

Where to go for More Information
What is a Grant?

A grant is a bounty, contribution, gift, or subsidy (in cash or kind) bestowed by a government or other organization (called the grantor) for specified purposes to an eligible recipient (called the grantee).

Grants are usually conditional upon certain qualifications as to the use, maintenance of specified standards, or a proportional contribution by the grantee or other grantor(s).
Finding Grantors

Your organization’s vendors
Bank
IT
Accounting
Marketing
Event Hosts

Your bank and your Board Member’s vendors
Find out who heads up the trust department (typically a trust officer) at each institution. Trust officers manage trust accounts for living and deceased money-giving individuals and families. These trusts are often not highly advertised sources of grant money. Ask and get some guidelines for finding them and applying to them for grants.
Finding Grantors

*Foundaion Directory Online*

Typically free at your local library
FDO Quick Start - the quick and easy-to-use tool for looking up key information on all U.S. foundations.
Use this type of search engine to find grants for arts/culture, capital, etc.
About

Purpose and Activities

The foundation supports organizations involved with arts and culture, education, health, human services, community development, and civic affairs. Special emphasis is directed toward programs designed to provide accessibility for individuals of all abilities; security for men, women and children who are homeless; and educational opportunities for children and youth who are living in poverty.
Foundation Directory Online Database Appointment Calendar

We are pleased to be able to offer remote access to Candid’s Foundation Directory Online database for our Partners to conduct grants research. Because we are only able to have one active user in at a time, we ask that you sign up for an appointment to go into the database using the calendar below. Members and Partners can book up to three hours for each appointment and can sign up for as many appointments as they would like. A Philanthropy MA staff member will send instructions for accessing the FDO on the day of your appointment.

For your foundation research, the FDO combines extensive data with intuitive search functionality and informative data visualizations. Grantmaker profiles provide a clear overview of the funder’s work along with all the pertinent details fundraisers need to find and approach logical prospects. The data in FDO is compiled from IRS Forms 990 and 990-PF, grantmaker websites, annual reports, printed application guidelines, the philanthropic press, and various other sources. The majority of the grantmakers listed in the FDO do not have websites and would otherwise be difficult to find.

*Please be sure to save your login credentials after your first appointment as you will need them to log in to the database each time after.

Philanthropy MA

Foundation Directory Online Appointments 180 minutes

Detailed instructions with a unique link will be sent FIVE minutes before the time of your appointment. A calendar invite and confirmation will be sent to your email.
Request for Proposals Database

To narrow your search, select your preferred Program Interest. You may also sort by any of the column headers. To view the details of an RFP, click on the RFP’s title (full data only available to Nonprofit Partners – learn about becoming a Philanthropy MA partner here). If you have a Philanthropy MA account and would like to submit an RFP, click here (you must be logged in). You can also submit an RFP by emailing a PDF or a link to a website explaining the program to rcp@philanthropyma.org.

<table>
<thead>
<tr>
<th>TITLE</th>
<th>DATE POSTED</th>
<th>DEADLINE</th>
<th>PROGRAM INTEREST</th>
</tr>
</thead>
<tbody>
<tr>
<td>Community Giving Grants</td>
<td>Sep 27 2021 - 3:08pm</td>
<td>Oct 13 2021</td>
<td>Community and economic development, Community improvement, Economic development, Community Development</td>
</tr>
<tr>
<td>Fallon/OrNda Community Health Fund</td>
<td>Sep 27 2021 - 2:25pm</td>
<td>Oct 29 2021</td>
<td>Community and economic development, Community improvement, Community Development, Health, Diseases and conditions, Health care access, Health care administration and financing, Health care quality, Mental health care, Prevention &amp; rehabilitation, Public health, Reproductive health care, Human rights, Antidiscrimination, Diversity and intergroup relations, Individual liberties, Justice rights, Social rights</td>
</tr>
<tr>
<td>Nonprofit Effectiveness Grant Program</td>
<td>Sep 27 2021 - 2:21pm</td>
<td>Nov 15 2021</td>
<td>Community and economic development, Business and industry, Community improvement, Economic development, Community Development, Graduate and professional education, Human/social services, Job services, Information and communications.</td>
</tr>
</tbody>
</table>
Resources

Enhance Skills:
- Meet-the-Users Program
- Workshops & Classes
- Special Initiatives

Access Our Resources:
- Resource Center at Philanthropy MA*
- Foundation Directory Online (by appointment)*
- Office Hours with Grants Research Associates (by appointment)*
- MAP Catalog*
- Customized Grants Research*
- Philanthropy MA Community Proposal & Report Forms

Other Resources:
- Grant Resource Networks
- Website Resources

Upcoming Events

- Oct 1st
  Fundraising Friday: How to “Help” Your Municipality Distribute the ARPA Funds
  Author: Consultant, GreatRiver Nonprofit

  At this follow-up to the July Fundraising Friday about the American Rescue Plan Act (ARPA) and how it could impact your organization, Danielle Pauly, Vice President for Government Affairs for the Massachusetts Nonprofit Network, will provide an ARPA update and further actionable steps...

  More »

- Oct 12th
  Hire! Fire! Invest! How to Strengthen Your Development Department
  Author: Consultant, GreatRiver Nonprofit

  Building a productive development department involves finding the right person to lead it. In this workshop, we will discuss the challenges that have

In Philanthropy

September 28th, 2021
Mismatched: Philanthropy’s Response to the Call for Racial Justice

source: Philanthropy Initiative for Racial Equity

Philanthropy Initiative for Racial Equity’s new report, Mismatched: Philanthropy’s Response to the Call for Racial Justice, identifies $3.4 billion in actual funding for racial equity work in 2020—less than 1% of some prior estimates based on broad spending commitments announced in press...

More »

September 8th, 2021
Diners of Colors Are Leading Shift in Giving Patterns

Source: MassNonprofit News

Philanthropies giving to racial and social justice causes increased across all demographic groups last year with the growing impact of crowdfunding and mutual aid demonstrating how donors of color are leading shifts in individual giving outcomes.
Enrollment is renewed on an annual basis, on the date of enrollment. Philanthropy Massachusetts’ partnership rates are based on the annual budget of participating organizations.

<table>
<thead>
<tr>
<th>ANNUAL BUDGET</th>
<th>DUES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Below $100,000</td>
<td>$100</td>
</tr>
<tr>
<td>$100,000 - $499,000</td>
<td>$175</td>
</tr>
<tr>
<td>$500,000 - $1,999,999</td>
<td>$300</td>
</tr>
<tr>
<td>$2,000,000 - $4,999,999</td>
<td>$450</td>
</tr>
<tr>
<td>$5,000,000 - $10,000,000</td>
<td>$600</td>
</tr>
<tr>
<td>Over $10,000,000</td>
<td>$750</td>
</tr>
<tr>
<td>Consultants: Individuals working with two or more nonprofit organizations</td>
<td>$400</td>
</tr>
<tr>
<td>Add-On: Customized Grants Research &amp; Free Attendance to Meet-the-Donors</td>
<td>$300</td>
</tr>
</tbody>
</table>

Join us today to enhance your development team. For more information, please contact our Programs and Services Coordinator.
Network with other grant writers to find out about their funding resource subscriptions. Ask what works and check out these additional possibilities.

**Benefits of a Membership**

**Professional Career Development -**

- **Annual Conference** - GPA’s annual conference has become the PREMIER grants event of the year, offering more than 70 workshops featuring the nation’s top experts, round-table discussions, funder presentations, exhibits and the popular Individual proposal review sessions. GPA’s annual gathering (occurs every fall) brings together grants professionals eager to share best practices, stay abreast of trends in our field, and network with peers from across America and abroad. Members receive a discounted rate than non-members on conference registrations.

- **Chapters** - As new chapters continue to form in every region of the country, members have the opportunity to be a part of GPA at the local level. Chapters offer meetings, panels, lunch and learn, happy hour events and more for members to learn on a local level. A GPA membership is a prerequisite for membership in a chapter.

- **Credentialed** - GPA is proud to have established the nation’s first valid credentialing process for grant professionals. Firm in its belief that certification should be done only within the most rigorous standards, GPA has formed an affiliated organization, the Grant Professionals Certification Institute (GPC). Members that are eligible to sit for the GPC exam, receive a discount on the registration fees.

- **Webinars** - GPA’s entire catalogue of live and archived webinars are offered to GPA members for free! This represents nearly $2,400 in annual savings for members. Access more than 80 live and recorded webinars!

**Making Connections/Networking -**

- **GrantZone Community** - GrantZone is a private community for members of GPA and one of the most powerful member benefits in GPA history. It is your connection to an incredible resource – over 2,800 of your colleagues who share your challenges and successes. We hope you will find it to be a place where you can ask advice, share your experiences (and resources) and build relationships from the convenience of your computer or mobile device. And you can access the community and all of its collective knowledge 24/7. Connect with your colleagues. Share resources. Participate in discussions. Be a part of this community for Grant Professionals just like you. We encourage you to [login to the community]. Note: Your email address and password are the same you use for the GPA website.

- **Chapters** - Chapters offer members a local venue in which to network and to exchange ideas, methodologies and resources.

- **Mentor Program** - GPA has a mentoring program available to our members. This opportunity is open for individuals to register as either a mentor, a mentee, or both. GPA defines mentoring as “the relationship between a grant professional who has a passion to guide, inspire and motivate others and a less experienced person in the profession who is seeking to accomplish a goal.”
Annual Membership Dues Levels:

Membership is limited to one year and stays with the individual should they leave the organization on record. Memberships are non-refundable and non-transferable.

Professional Membership - $220
Professional Membership is available for individuals that do not fall in any of the following categories: Student, Entry Level, Retiree or Legacy. Individuals who are Professional members are able to run for a position on the GPA Board of Directors, vote, volunteer and receive full member benefits.

Student Membership - $82
Student Membership is available for persons who are enrolled as full-time undergraduate students at a college or university (12 credit hours) or who are enrolled in a graduate program. Individuals who join GPA as a Student member must provide documentation to verify membership eligibility in this category. This documentation in the form of an acceptance letter from the institution or a class schedule will be requested by GPA Headquarters to certify that you are eligible for this membership type. Student members are able to run for a position on the GPA Board of Directors, vote, volunteer and receive full member benefits.

Entry Level Membership - $160
Entry Level Membership is a category for persons who have been in the grants profession for two years or less. Membership in this category is limited to one year. After one year, the member will be moved to the Professional membership category and pay the appropriate dues at their renewal date in order to stay in good standing with GPA. Entry Level members are eligible to run for a position on the GPA Board of Directors, vote, volunteer and receive all member benefits, except for the GPA Consultant Directory.

Individuals who join GPA as an Entry Level member must provide documentation to verify membership eligibility in this category. This documentation in the form of a resume and/or letter from your employer will be requested by GPA Headquarters to certify that you are eligible for this membership type.

Retiree Membership - $92
Seeking retirement soon? Stay connected with your community and use your expertise to mentor new grant professionals by renewing at the Retiree Membership rate. GPA is happy to maintain our relationships with our members for the long term, even into their retirement. And we know that many retired association professionals want to keep in touch with colleagues. The Retiree Membership is a category for persons who are not working as a grant professional in any capacity (i.e., either part-time or full-time employed) in the grants profession.
Governmental

State

Federal

Grants.gov

*MA Cultural Council
Who is funding your competitors and collaborators?
[QUESTIONS]

[ANSWERS]
What is a Grant Ready Organization?

- Organization Mission Statement
- Strategic Plan
- Community Needs Assessment
- Analysis of Service Provider
- Existing Diversified Operating Budget
- Policies and Procedures
- Grant Management Capacity
- Partner Discovery and Engagement
- Project Strategic Plan (Program Goals/Plans For Prioritized Funding Needs)
The Most Common Sections of Grant Proposals

1. Cover Letter
2. Executive Summary
3. Need Statement
4. Goals and Objectives
5. Methods, Strategies, or Program Design
6. Evaluation Section
7. Other Funding or Sustainability
8. Information About Your Organization
9. Project Budget
Consider Your Audience
KNOW YOUR AUDIENCE
Who will be making the decision about whether your proposal gets funded? If it is panel of people, does the panel include only professionals, who will understand your use of jargon? Are teens/clients on the panel, who will misunderstand jargon, but may respond well to photographs? Are older people on the panel, who may appreciate larger size fonts?

KNOW WHAT YOUR AUDIENCE LIKES
What styles characterize the Request for Proposal, the website, grant application, and/or annual report? Is it informal with kid-oriented fonts and simple language? Try matching your style to the foundation's style.
MATCHING MISSIONS

When seeking funding opportunities, look for a close match between what you wish to do and what the funding organization’s mission is. If you have to stretch to make the missions match, it is not likely that your proposal will be funded. The Gates Foundation may have lots of money to give away and may fund education, but they will not be giving money to small projects in Lowell.
Remember the golden rule!

What's that?

Whoever has the gold, makes the rules!
The best indicator of future behavior is past behavior.
**Form 990-PF**

**Return of Private Foundation**

For calendar year 2019 or tax year beginning _____ and ending _____

Name of foundation

**Amelia Peabody Foundation**

c/o Margaret N. St. Clair

1 Hollis Street

Wellesley, MA 02482

**Employer identification number**

04-6036558

**Telephone number**

781-237-6468

**Check all that apply:**

- [ ] Initial return
- [ ] Initial return of a former public charity
- [ ] Final return
- [ ] Amended return
- [ ] Address change
- [ ] Name change

**Check type of organization:**

- [x] Section 501(c)(3) exempt private foundation
- [ ] Section 4947(a)(1) nonexempt charitable trust
- [ ] Other taxable private foundation

**Fair market value of all assets at end of year (from Part II, col. (c), line 16)**

170,379,329

**Accounting method:**

- [x] Accrual
- [ ] Cash
- [ ] Other (specify)

**Analysis of Revenue and Expenses**

- **(a) Revenue and expenses per books**
- **(b) Net investment income**
- **(c) Adjusted net income**
- **(d) Disbursements for charitable purposes (cash basis only)**

1 Contributions, gifts, grants, etc. received
<table>
<thead>
<tr>
<th>Payment Date</th>
<th>Grantee Legal Name</th>
<th>Grantee Address</th>
<th>Mark if Recipient is an Individual</th>
<th>Foundation Status of Recipient</th>
<th>Purpose of Grant</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>12/5/2019</td>
<td>826 Boston Inc</td>
<td>3035 Washington St, Roxbury, MA 02119</td>
<td></td>
<td>PC</td>
<td>Operations</td>
<td>25,000.00</td>
</tr>
<tr>
<td>3/14/2019</td>
<td>Academy of the Pacific Rim</td>
<td>1 Westinghouse Plaza, Bldg B, Hyde Park, MA 02136</td>
<td></td>
<td>PC</td>
<td>APR 1.1 technology initiative</td>
<td>75,000.00</td>
</tr>
<tr>
<td>12/5/2019</td>
<td>Family Services of the Merrimack Valley f/b/o Achieving the Dream</td>
<td>327 Riverside Drive, Florence, MA 01062</td>
<td></td>
<td>PC</td>
<td>Gateway to Career program in Massachusetts, for one</td>
<td>60,000.00</td>
</tr>
<tr>
<td>6/25/2019</td>
<td>Action Centered Tutoring Services</td>
<td>35 Chestnut Street, Springfield, MA 01103</td>
<td></td>
<td>PC</td>
<td>Operations</td>
<td>10,000.00</td>
</tr>
<tr>
<td>9/19/2019</td>
<td>Action Centered Tutoring Services</td>
<td>35 Chestnut Street, Springfield, MA 01103</td>
<td></td>
<td>PC</td>
<td>Operations</td>
<td>20,000.00</td>
</tr>
<tr>
<td>3/14/2019</td>
<td>Action Inc</td>
<td>180 Main Street, Second Floor, Gloucester, MA 01930</td>
<td></td>
<td>PC</td>
<td>COMPASS Youth Program</td>
<td>20,000.00</td>
</tr>
<tr>
<td>3/14/2019</td>
<td>African Community Education Program</td>
<td>484 Main Street, Suite 355, Worcester, MA 01608</td>
<td></td>
<td>PC</td>
<td>ACE Summer Reading &amp; Workforce Development Program</td>
<td>40,000.00</td>
</tr>
<tr>
<td>12/5/2019</td>
<td>All Dorchester Sports League Inc</td>
<td>1565 Dorchester Ave, Dorchester, MA 02122</td>
<td></td>
<td>PC</td>
<td>Operations</td>
<td>20,000.00</td>
</tr>
<tr>
<td>1/2/2019</td>
<td>Alliance for Inclusion &amp; Prevention Inc</td>
<td>31 Heath St, Suite 14, Jamaica Plain, MA 02130</td>
<td></td>
<td>PC</td>
<td>The Center for Advancing School-Based Mental Health (&quot;The Center&quot;)</td>
<td>25,000.00</td>
</tr>
</tbody>
</table>
1. RESPOND TO THE QUESTIONS: After you have written a response to a question, read the question and answer again.

2. REPEAT YOURSELF: Do not be afraid to repeat yourself. In addition, it is typically better to repeat yourself than to say, "see section X".

3. WHEN IN DOUBT: If you are unsure, call the foundation to ask for clarity. Building relationships with foundation personnel can be critical.
WHY ARE WE HERE ANYWAY? Too many times, proposals are written in terms of organizational needs.

AVOID JARGON: Unless you are sure that the review panel is composed of people in your profession, use common words.

LIMIT FLUFF: Avoid artistic language and value judgments.
EFNE’s EQOL project, “Improving Quality of Life and Health Equity for People Living with Epilepsy through Multi-Sector Partnerships,” a Component B Applicant under Strategies 3 and 4, will strengthen the health system and improve QOL for PWE in New England – especially those with uncontrolled seizures – by advancing 1:1 Care Management services in EERRs at 11 Epilepsy Centers in 4 states by (a) implementing Activate Care - an electronic, multidirectional communication, data collection, and referral system to support PWE's physical, behavioral, and social needs’ ecosystems; (b) building data-driven linkages for patients between clinical services and a repository of useful community services, socialization programs, and self-management programs; and (c) equipping EERR Coordinators with basic social work skills, CHW training, and referral resources, including the ability to qualify patients for self-management programs.
1. USE BOLD, ITALICS, ETC. SPARINGLY: Less is more!

2. LEFT MARGIN ALIGNMENT

3. WHITE SPACE & BREVITY: Use clear and concise language to make your point. Bullet points and infographics can improve the readability of your proposal.
• **Use a storytelling approach** (with supporting statistics) in such a compelling way that the reader can’t put down your application until she makes a positive funding decision. Make them cry!

• **Incorporate a case study** of a real client your organization has served. Of course, change the name for confidentiality reasons. Show a real need of a real person.

• **Not just for grants.**
Linda is a 27-year-old person living alone in metro Boston; she has uncontrolled seizures. She is prescribed a seizure alert “watch” by her doctor and calls EFNE for financial support to purchase the item. Linda is a patient at Tufts Medical Center. The Tufts EERR Coordinator, Pranit, is assigned to Linda. Pranit communicates with the watch company, uploads the required patient’s prescription, and pays for the watch. When it arrives at the patient’s home, she cannot “get it to work.” Pranit helps Linda set up the watch. Then, Linda needs help explaining the alert system to her mother, who speaks Spanish. Pranit is bilingual and calls Linda’s mother. In the process of assisting the patient, Pranit comes to understand that Linda is socially isolated. Pranit tells the patient about EFNE support groups, but the patient does not attend. Linda begins attending when Pranit offers to attend the virtual sessions with her; at the first 3 meetings, Linda’s video is off, and she is on mute. At the fourth meeting, Linda begins to engage by unmuting herself. Pranit also identifies that Linda is food insecure after he explores several comments Linda has made (e.g., “I am dizzy”). Pranit connects Linda with a food pantry. A week later, Pranit checks in with Linda who has not visited the pantry. They “zoom” to look up the hours and location of the pantry together. Pranit texts Linda 3x to remind her to visit the pantry during the next hours in which it is open. Finally, Linda mentions that church is a place she feels she has community and that she wishes her minister and church members better understood her. Pranit offers to conduct an educational meeting for church leaders, and when Linda agrees, a 45-minute Seizure First Aid (SFA) educational program is provided by the Coordinator and EFNE’s SFA-certified staff. Now, Pranit checks in with Linda every 10-14 days to see how she is doing and to keep the door open for additional referrals or help.
Hire a proofreader or editor (or a college student) to read your writing and clean it up. Don’t have any money? Ask a trustworthy and capable co-worker or friend.
Community Colleges and Universities
Philanthropy MA
GPA

Further training!
About


This is the first time Foundation Center has issued a product in audio format. The entire book is included with alternate chapters having been recorded by two New York volunteers from RFB&D. For your convenience the audio version is divided into tracks corresponding to chapters in the book. You can listen to just the chapters that interest you or download the book as a single mp3 file.

**Download the audiobook as a single file.**
(09:30:57, 653MB)

**Download individual chapters:**

Preface and From the Author
(0:22:51, 27MB)

Getting Started: Establishing a Presence and Setting Funding Priorities
(0:09:50, 12MB)

Developing the Proposal: Preparation, Tips on Writing, Overview of Components
I'm glad I took the Grantsmanship Training Program. My proposal writing won an additional $950,000 for our college funding.

Laurie Webster, JD, Associate VP for Student Success Services, Western Wyoming Community College, Rock Springs, WY

GRANTSMANSHIP TRAINING PROGRAM®
COMPETING FOR FEDERAL GRANTS
ESSENTIAL GRANT SKILLS
NOW ONLINE

CHECK OUT OUR TRAINING

GRANTSMANSHIP TRAINING PROGRAM
Get funding for your community.
Now offered online!
In only 5 days learn to find funding and use the world's most successful grant proposal format. Learn by doing! Get expert advice, tips, and exercises.

ESSENTIAL GRANT SKILLS
Tight schedule & tighter budget? Now offered online!
This 2-day course concentrates the material of the 5-day Grantsmanship Training Program into bite-size info and exercises. Learn how to make a success of a tense environment.

COMPETING FOR FEDERAL GRANTS
Ready to take your grant skills to the next level? Now offered online!
In 5 days, learn how to find federal grant opportunities that match the priorities of your community and senior donors.

GRANT MANAGEMENT ESSENTIALS
Effective grant administration is essential for your agency. Now offered online!
In this 2-day workshop, learn to manage grants so your organization is in full compliance. Develop an annual calendar and manage the grant proposal process.
Questions Submitted at Registration

- **TIPS FOR APPLYING FOR GENERAL OPERATING EXPENSES**
- **CAPITAL CAMPAIGN GRANTS**
- **WHEN INCLUDING A PERCENTAGE OF OVERHEAD IN A PROGRAM GRANT REQUEST, HOW SHOULD IT BE LISTED?**
- **DO ALL FOUNDATIONS WANT TO KNOW ALL THE GRANTS OUR ORGANIZATION IS CURRENTLY RECEIVING?**
- **HOW DO YOU MANAGE GRANT CONDITIONS AFTER AWARD OF THE GRANT? DO YOU HAVE A DESIGNATED GRANT ADMINISTRATOR?**
- **WILL WE FIND AS MUCH OPPORTUNITY FOR SPONSORS/DONORS DURING THIS PANDEMIC AS IN 2019 AND BEFORE?**
QUESTIONS

ANSWERS