

Fundraising Fundamentals

THE NUTS AND BOLTS OF GRANTSWRITING



with Marte Siebenhar

INTENTIONS

What would make this 90-minute workshop a success for you?

***Please drop your answer in the chat*



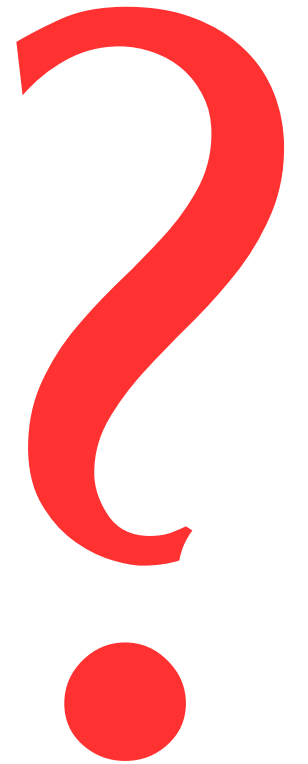
AGENDA

- Welcome + Intentions
- Grant Myths + 4 Keys to Grants Success
- Grants 101
- Pillars of Grant Writing Success
- Picking a Writer
- Q+A
- Reflect + Recap
- Takeaways + Closing

POLL

Who's in the room?

***Please complete the poll in Zoom
so I know more about you for our
workshop today.*



HI, I'M MARTE!



How it Began



How it's Going

I'M YOUR GUIDE FOR THIS SESSION

- Professional musician + innovator
- Background in:
 - Arts education: classroom, stage, curriculum, teacher training
 - Consulting + strategic planning
 - Arts executive
 - Executive coaching
- Founder / business owner / healer

WHAT ABOUT GRANTS?

- First successful grant at age 24: \$30K NEA
- Love storytelling, seeing + communicating about the magic of impact
- \$21 million raised since 2019
- Now I want to share what I know with you. Why?

TOP 4 MYTHS ABOUT GRANTS

Myth #1:

Grants are “easy” (money).

TOP 4 MYTHS ABOUT GRANTS

Myth #2:

**All grants are pretty much the same...
once we have copy, we can “set it and
forget it.”**

TOP 4 MYTHS ABOUT GRANTS

Myth #3:

Grant funding is the most “sustainable” way to raise funding.

TOP 4 MYTHS ABOUT GRANTS

Myth #4:

Grants don't require a personal touch.

4 KEYS TO GRANTS SUCCESS:

1. Create Systems + Process

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1. Create Systems + Process
2. Engage in Strategy Regularly
3. Develop + Hone Quality Copy
4. Understand + Optimize your Interactions to Build Great Relationships

Grants 101: The Basics

WHAT IS A GRANT, ANYHOW?

- Project vs. operating
- 1-year vs. multi-year
- Primarily “institutional” funders:
government, foundation, corporate

INVITATION TYPES

- RFP or RFQ (typically government)
- Open call or submission / unsolicited applications welcome
- Closed process (no unsolicited applications)

PROSPECTING

- Funder mailing lists
- Industry mailing lists
- Program officer / direct invitation
- Board of Directors
- Foundation Directory Online (access @ MDPLS)
- Google search
- Other databases (some AI-powered)
- Elected Officials
- Grants.gov (rabbit hole)

WHAT ARE THE STAGES OF A TYPICAL GRANT?

- Vet the opportunity for fit (you / funder)
- (LOI / letter of intent: usually <3 pages)
- Full Proposal: Narrative, Budget, Support Docs
- Report (interim, final)*
 - ***Be prepared for rigorous reporting for local/federal.*

Note: Steps for municipal/federal grants vary based on local practices/agency.

GRANT HOW-TO

Strategy

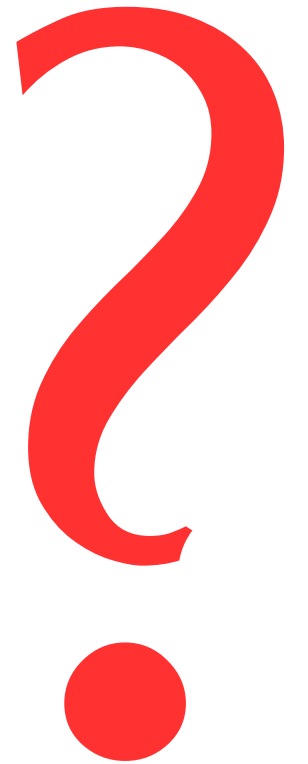
WHAT ELSE IS A GRANT?

- Platform for storytelling
- Influential writing:
 - know -> like -> trust
- Budget that shows you can implement!

YOUR TURN

Think about someone you trust.
Why do you trust them?

(please respond in the chat)



THE SAME PRINCIPLES APPLY TO FUNDERS

- Show up / be consistent
- Act in integrity / be honest
- Communicate
- Understand / demonstrate shared values - burden of “fit” is on you
- Express gratitude, appreciation / don’t take them for granted

IN PRACTICE, STRATEGY LOOKS LIKE:

- Do adequate research
- Advocate for the reader: show, don't tell
- Clearly define project, need, audience, how you'll measure success
- Answer what's asked, articulate mutual fit
- Prove that your approach works, using data
- Be professional (quality, grammar, spelling, timeliness)
- Express gratitude, appreciation
- Share updates, give credit, be generous

GRANT HOW-TO

Systems + Process

PILLARS OF GRANT SUCCESS

Pillar #1:

Have a system to stay organized.

PILLARS OF GRANT SUCCESS

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- **Project management:** Trello, Asana, Airtable, Basecamp, Monkeypod

PILLARS OF GRANT SUCCESS

Pillar #2:

Create a realistic SOP for routing + completion.

PILLARS OF GRANT SUCCESS

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Create a realistic SOP for routing + completion.

- **Know whose move it is:** Internal / external routing:
 - Vet, draft, fact-check/edit, support docs, budget, calendar, data, receipts/payments

PILLARS OF GRANT SUCCESS

Pillar #3:

Establish a yearlong view of funding.

- **Create strategy and matching pipeline:**

PILLARS OF GRANT SUCCESS

Pillar #3:

Establish a yearlong view of funding.

- **Create strategy and matching pipeline:**
 - Effect on cash flow (reimbursement)
 - Plan to manage gaps
 - Anticipate / manage internal energy (esp. Jul, Nov, Feb / Mar)

PILLARS OF GRANT SUCCESS

Pillar #4:

Avoid procrastination.

- Follow a regular “grants hygiene” protocol:

PILLARS OF GRANT SUCCESS

Pillar #4:

Avoid procrastination.

- **Follow a regular “grants hygiene” protocol:**
 - Know what’s in the pipeline + status
 - Avoid unpleasant surprises such as “extra” questions
 - Manage your reputation
 - Manage internal energy / your / your team’s nervous system(s)

PILLARS OF GRANT SUCCESS

Pillar #5:

Set up systems for success.

- Anticipate what funders will ask
- Create / preserve institutional memory
- Make it easier to submit

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Set up systems for success.

- Anticipate what funders will ask
- Create / preserve institutional memory
- Make it easier to submit
- **Centralize what's commonly required:**
 - Shared drives, boilerplate
 - Docs + data

PILLARS OF GRANT SUCCESS

Pillar #6:

Celebrate successes, share wins.

- Express gratitude to funders
- Communicate with stakeholders (internal, external), before / after
- Build trust with your community, other funders

What are the docs +
data you should have
on hand at all times?



FOUNDATIONAL DOCS + DATA TO HAVE ON HAND

- Boilerplate w/ minimum:
 - Leadership names, roles, contact info, EIN, mission, founding date, org budget \$, mission, # FTEs, #PTEs, # volunteers, board / staff / beneficiary demographics

FOUNDATIONAL DOCS + DATA TO HAVE ON HAND

- Boilerplate w/ minimum:
 - Leadership names, roles, contact info, EIN, mission, founding date, org budget \$, mission, # FTEs, #PTEs, # volunteers, board / staff / beneficiary demographics
- Best case:
 - Overview of need + your solution (“success” looks like...)
 - Org history
 - Overview of audience / beneficiaries
 - Evaluation plan + data (how you “prove” success)

FOUNDATIONAL DOCS + DATA TO HAVE ON HAND

- IRS Form 990 (stamped), audited statements, reviewed financial statements
- FL Charitable Solicitation certificate
- Board list (w/ addresses, titles, companies)
- IRS 501c3 designation letter
- Organization budget - current year
- Program data examples / ways you've acted on data
- Top 5 Funders
- Work samples
- Support letter template

GRANT HOW-TO

Quality Copy (+ Budgets)

NARRATIVE BEST PRACTICES

- Goal: make your application “irresistible” to the funder
- Bold copy, tell a story + compel
- Use action words (show, don’t tell)
- Answer the question
- Tailor to the funder + what they care about
- Mirror the funder’s language - **show** you understand their priorities
- Address character count / word limit last

DATA MAKES THE NARRATIVE

- Data is how you build trust in the reader that:
 - You have the capacity to undertake and complete the work successfully
 - You have successful systems and processes that look to quantify impact (now, future)
 - You have actual proof of impact (data)
 - You actively use data to learn + implement / course-correct

DON'T MAKE THE BUDGET AN AFTERTHOUGHT

- Most funders want a balanced (net zero) project / org budget.
- Show other funders participating (if applicable), but **don't show an overfunded project.**
- Budget = reflect the realities of the project:
 - Video project: show video contractor fees, premiere / screening fees, editing, etc.
 - “Make it make sense” to the numbers folks.

GRANT HOW-TO

Hiring (or Not) a Writer

IN-HOUSE OR EXTERNAL?

Depends on capacity:

- In addition to annual giving efforts, how many grants of what size do you need to apply for in order to meet your budget needs?
- Who is the writer in-house? Do they have capacity to do that and other tasks in their wheelhouse?

IN-HOUSE OR EXTERNAL?

Benefits of external:

- Frees up internal staff for other revenue generating activities, releases them from project management
- Should be able to raise their annual retainer relatively quickly

Downsides of external:

- Not staff; they will need fact-checking, materials
- Still requires staff time for review

HOW TO CHOOSE A WRITER

- Assess fit - do you trust them?
- Ask for work samples, proof points
- Request references
- Ask what drives them / their values
- Ask what success looks like (for you / for them), day to day and long-range
- Determine terms (hourly or flat fee, # hrs / # projects)
- Paid trial project or period

Q + A

What are your questions?



How do I work?

- 1:1 coaching
- Organizational grant strategy
- Group programs
- Speaking

UPCOMING VIRTUAL PROGRAM

National Endowment for the Arts: Grant Prep Bootcamp

January 16, 2025

9:00am - 1:00pm

thebusinesshealer.com/nea



WOULD YOU LIKE TO STAY IN TOUCH?



thebusinesshealer.com



@the_businesshealer



W R A P - U P

What's your top takeaway from today?

***Please drop it in the chat.*

Thank You!

MAY YOU BE SUPER PROSPEROUS!

