

Grant and Proposal Development

Creating the foundation for Agency success!

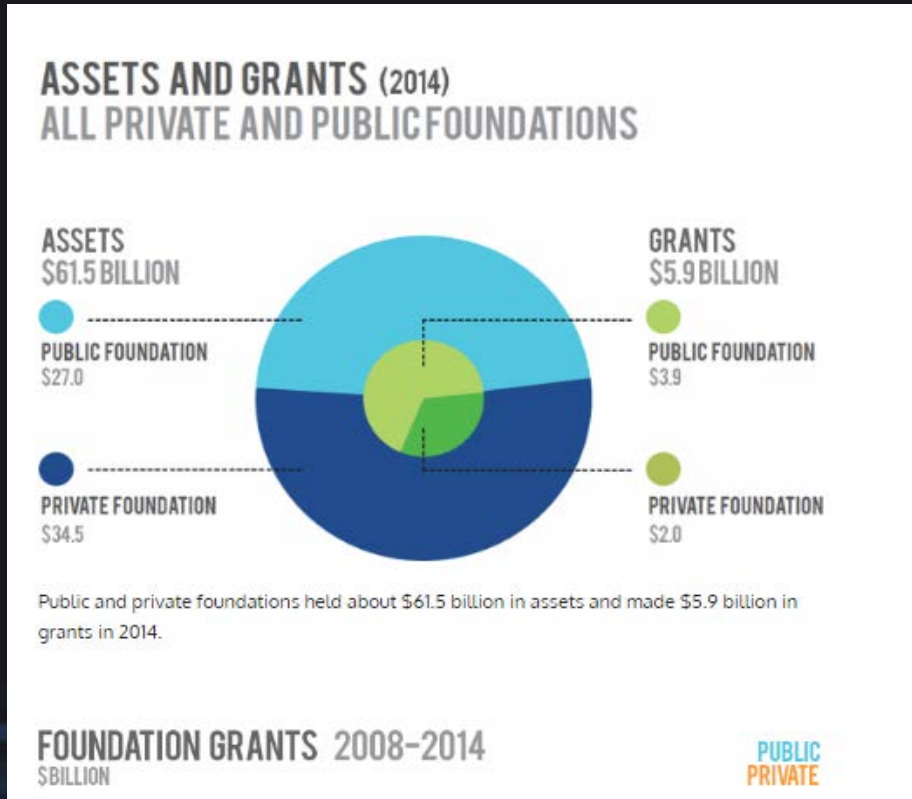


HOW TO WRITE THE ~~PERFECT~~ GRANT

HOW TO WRITE A ~~WINNING~~ GRANT

HOW TO WRITE THE MOST EFFECTIVE GRANT

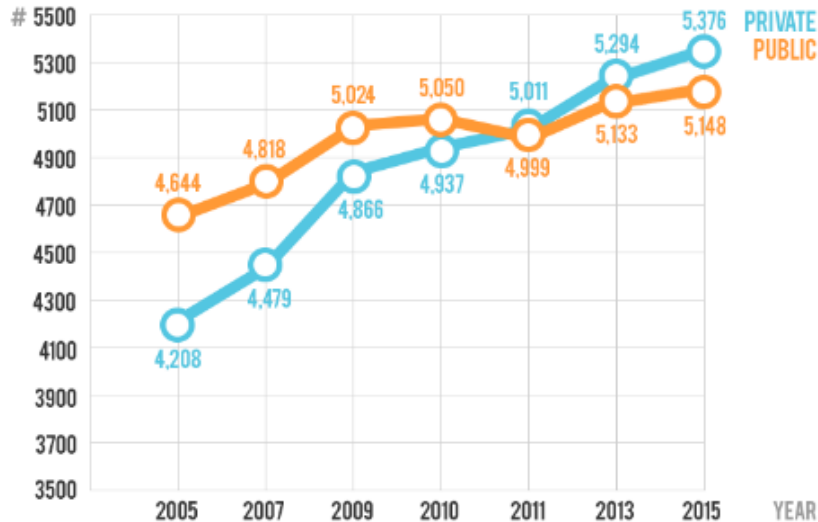
Private & Public Grantmaking Foundations in Canada



Public and private foundations held \$61.5 billion in assets and made \$5.9 billion in grants in 2014

Private & Public Grantmaking Foundations in Canada

GROWTH IN NUMBER OF FOUNDATIONS 2005-2015

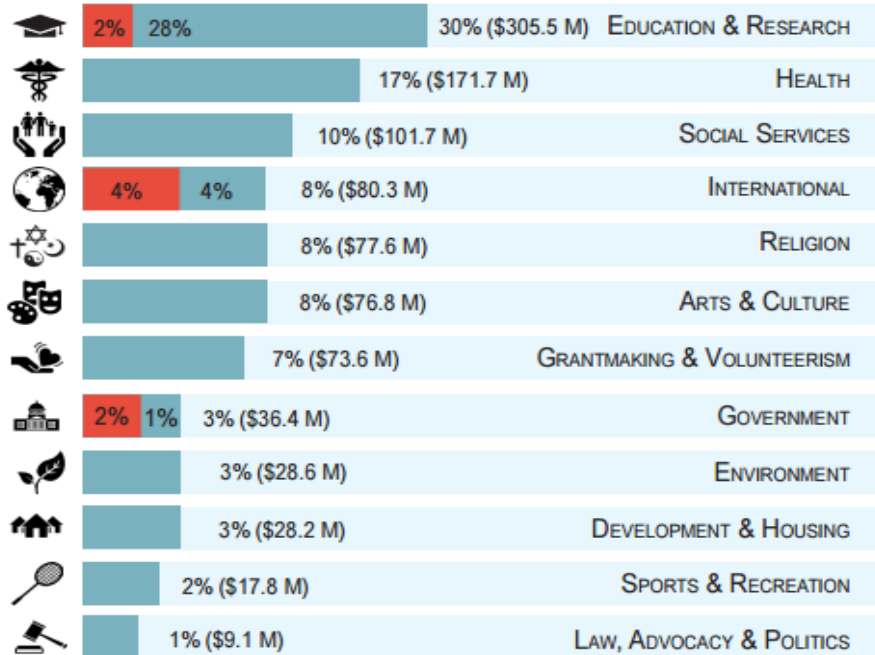


Foundations have grown steadily in number of the last five years.

Public and private foundations have grown steadily in over the recent 10 year period

Private & Public Grantmaking Foundations in Canada

FUNDING BY ISSUE



Where the
grant money is
going!

\$5.9 Billion
given out in
2014!

Private & Public Grantmaking Foundations in Canada

Under the *Income Tax Act*, a registered foundation may make grants or gifts only to qualified donees, including:

- Registered charities
- Registered Canadian amateur athletic associations
- Registered national arts service organizations
- Housing corporations resident in Canada constituted exclusively to provide low-cost housing for the elderly
- The United Nations and its agencies
- agents
- Universities outside Canada listed in schedule VIII of the Income Tax Act Regulations
- Charities outside Canada to which Her Majesty in right of Canada (the Federal Government) has made a gift during the last 12 months
- Municipalities in Canada
- The Federal Government, Provincial Government, or their agents

Going Private *(non-government!)*

Here are the trends:

1. More grant makers are replacing traditional paper proposals with online applications.
2. **Research finds that “the quantity and quality of instructional information and assistance for grant seekers was poor.”**
3. Research finds “vast differences and inconsistencies in procedures, questions, and requirements of funders presented challenges that increased the administrative demand placed on nonprofit staff.”

Going Private *(non-government!)*

...and this trend!

“the most frequent reason for turning down requests is that they do not fit within their funding interests”

Going Private

You have **100** words to answer the following:

- “What sets you apart from others doing this work?”
- “How does your project align with the goals and priorities of our Community Investment Program?”
- “If you received 25% less funding than requested, what impact would that have on your project?”

Going Private

You have **150** words to answer the following:

- “What would the impact of this project be, if successful? Please quantify the potential impact, and explain how you calculated your estimate?”
- “Often there are alternative approaches or solutions to a particular problem. Why would a potential beneficiary or user choose to engage with your product or service?”
- “What are the 2-3 most significant risks you anticipate in this project? How has your team planned to address them?”

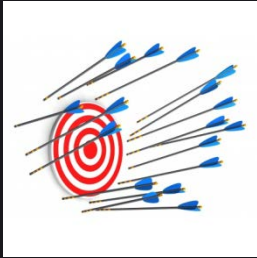
Focusing

One of two sources to assess and target:

1. Find specific funding sources that meet the specific service and programs you offer (**lower percentage**)
2. Find relevant funding sources that might support 'variations' or 'new' types of services and programs (**higher percentage**)



Targeting



Shotgun Approach

Writing the same, general grant to numerous funding sources

(lower percentage)

Rifle Approach

Writing unique grants specific to relevant funding sources

(higher percentage)

Research...and more research

Most private funders provide their documents and information via websites

- Do you meet their funding and corporate priorities?
- Does your concept address their target groups?
- Do you meet their criteria – local, provincial, nat'l?
- Understand – *submission dates, support documents, partnerships, actual and in-kind contributions, quantity and target of outcomes, sustainability.*

Insurance Company Example

In past 5 years, 4 projects from \$5K to \$20K were funded.

- *WHAT FOR*: totally different projects supporting youth in the same organization.
- *WHY*: each one was sponsored and supported by an insurance broker, or agent who was linked to organiz.

Targeting and Focusing

4 Options & Opportunities for targeting applications

Expand *existing* services/program with SAME funders

Provide *new* services/programs with SAME funders

Expand *existing* services/programs with NEW funders

Provide *new* services/programs with NEW funders

Increasing Probabilities

Beneficial tips and practices

1. Objective data/research that validates and supports your application goals/objectives or stated needs/gaps.
2. Identify & Confirm Partners and Contributors
 - Funding contributions
 - In-kind contributions
 - Letters of support



Increasing Probabilities

Beneficial tips and practices

3. Valuate your agency contributions

- Actual funds being contributed
- Putting Value on in-kind contributions which have costs associated
 - Formula for 'contributions' to cover office space, internet, phones, bookkeeping, printing/photocopying, management support, mileage/travel



Increasing Probabilities

Beneficial tips and practices

4. Methods for measuring/evaluating

- Establish quantitative and qualitative measuring tools and processes
- Formal
 - #’s served, #’s passing, #’s moving to next step, #’s per demographic
- Informal
 - Sessions offered, attendance at workshops, user surveys, testimonials



Increasing Probabilities

Beneficial tips and practices

5. Critical path



6. Who is in your network of influence:

- E.g. Insurance company grants
- Board members, insurers, accountants, suppliers

7. Competition or Duplication

- Other agencies with same geography, mandate, services

8. Collaboration – when, who, what options exist with others that provide greater options & opportunities



Content Framework

Key content and questions for many applications

- Project Objectives
- Describe your solutions and resolutions?
- How will it be done?
- Why is this needed?
- What will you accomplish?
- Milestones?

- Barriers to success?
- Proof of needs or gaps?
Evidence?
- How will you evaluate results?
- How will it improve community, clients, situation?
- Will you sustain this and how?

Planning & Preparation

Some key, organization documents and information to secure that are required for most applications

- Signed, audited statements (recent 2 years)
- List of Board members, names and positions
- Registered charity #'s, years in business, articles of incorporation

Planning & Preparation

- # of employees, # of volunteers
- Main program/service descriptions – clients, locations, programs offered
- Strategic plans, operational/business plans
- Annual reports

Planning & Preparation

- Previous applications and reports for grants received
- Where relevant, copies of budget to ensure linkage and connection with funding (e.g. may be limits; unrestricted vs. restricted funds)
- Studies/reports that validate/verify your services and/or the need addressed through your application

QUESTIONS, COMMENTS & NEXT STEPS





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