Capacity Building Toolkit: Grant Management from A to Z

Facilitator's Edition

Writing Proposals and Reports to Funders

Women's Learning Partnership

For Rights, Development, and Peace

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Who We Are

Women's Learning Partnership for Rights, Development and Peace (WLP):
A partnership of 20 autonomous organizations, Women's Learning Partnership (WLP) trains and supports women in the Global South, primarily in Muslim-majority countries, to become leaders and advocates for a just, peaceful world. WLP creates culture-specific leadership trainings on democratic participation, and it partners with local organizations to help women gain the skills they need to fulfill greater leadership roles at the family, community and national levels. Over the past decade, WLP has developed curricula and education resources that encourage women's leadership and rights, and bolster their capacities as agents for change toward the establishment of free, fair, and democratic societies. In 2001, WLP published *Leading to Choices*, a leadership training manual for women with a special focus on women in Muslim-majority societies. By 2010, *Leading to Choices* had been translated into 20 languages and adapted for dozens of different cultural contexts. To date, WLP's programs and training materials have reached tens of thousands of women and men in over 40 countries, strengthening local organizations to become self-sustaining and empowering women's movements around the globe.

Preface

WLP is actively working to take advantage of online tools and platforms to assist women's rights organizations and to broaden and deepen connections with activists around the world. Access to technology and increasing infrastructure is allowing more individuals and organizations from even remote and isolated areas to gain knowledge, build constituencies, raise awareness, and mobilize around democratic movements. In this new digital environment, it is critical that WLP utilizes online platforms and tools to provide activists and civil society actors with accurate information, resources, and opportunities to connect and build their capacities.

To that end, WLP is developing a robust online learning program that incorporates an Online Learning Portal, *ABAN*, to facilitate online workshops and other activities to build the capacities of partners and young people to learn, exchange, and enhance their skills to be prepared to fully participate in online and offline democracy building and civil society exchange.

In January 2014 and June 2014, WLP held online *ABAN* trainings on report writing and proposal writing, which form the basis for this toolkit. These sessions were part of a series of online capacity building trainings focused on enabling participants to learn concrete skills that they can utilize to make their organizations and their work more sustainable and impactful in the long term.

Introduction

Securing diverse and sustainable funding is a necessity for virtually every non-profit or non-governmental organization (NGO). Without funding, organizations cannot carry out their programs, deliver services, demonstrate the results of their work, or achieve their missions. But to secure the funding needed to implement any project, a manager needs to make sure that each person on her team has the knowledge and skills to contribute to the grant proposal writing *and* grant reporting processes.

Preparing a strong proposal takes an enormous amount of effort, and developing a strong, compelling narrative must include input from the organization's program staff, financial staff, and leadership, among others. However, writing the proposal is just the first step. To secure multi-year or repeat grants—which are critical to ensuring long-term programmatic and organizational sustainability—how you report back to funders is critical. Again, it takes not only a team effort to ensure that funds are spent wisely, efficiently, and with the greatest impact, it also takes input from almost everyone in the organization to help communicate to the funder that they have made a wise investment in your organization and that the investment is producing the strong returns that the funder wants to see.

We hope this toolkit will help organizations create a culture of learning, sharing, and ownership over the entire grants management process.

Purpose and Structure

Purpose

The purpose of this toolkit is to provide readers or online training session participants with tools that enable them to gain an overall understanding of effective grants management—from writing strong proposals to managing relationships and ongoing communications with funders to writing accurate reports—and to build their confidence to be an active part of those processes.

Women's Learning Partnership developed this toolkit to enable our partner, affiliate, and other non-governmental organizations around the world to write compelling and engaging grant proposals and reports to funders and to establish ongoing dynamic relationships with their funders, with the goal of securing increased funding for programs that promote women's human rights.

Structure of the Toolkit

The toolkit is divided into two main sections: Writing Proposals and Writing Reports. Within these sections, various sessions focus on the components needed to accomplish this: researching and identifying potential funders, strategizing the approach, gathering needed information, and writing the proposal; and writing the report. We emphasize throughout the importance of building a strong relationship with the funder's program officer—a relationship built on openness, honesty, transparency, and respect. In this way, the *relationships* aspect of grants management is mainstreamed throughout this training. The Resources section includes examples of core concepts mentioned in the toolkit, as well as additional materials.

Grants Management Training Sessions Overview

The training material in this toolkit has been prepared to accompany a series of online training sessions. This information in this toolkit was designed to be delivered over three-to-four, two-hour online training sessions, divided into two primary sections:

- Section one focuses on the components for writing strong and compelling proposals.
- Section two focuses on the components for writing accurate and engaging reports.

Section 1: Writing Proposals

Introduction

Fundamentals

The following principles are basic to all fund development activities, not just proposal or report writing:

- **All fundraising is based on relationships**. One of the ways we strengthen that relationship is through writing compelling proposals that directly target a funder's goals and priorities. The letter of inquiry or proposal may be the funder's first impression of you and your organization – and first impressions are important!
- **Put yourself in the mindset of the funder** and keep in mind what's important to them, more than what's important to you – after all, they will be making the decisions about whether to fund your request.
- **Preparation is key!** Writing reports and proposals is like planning a conference – 90% of the work is in the preparation; 10% is the actual conference. Most unsuccessful proposals fail because of lack of preparation.
- **Putting together a successful proposal is the responsibility of *everyone* in your organization**. If we want our work to move forward, we need everyone's help – so make sure that others in your organization know the specific or types of information you need from them and when you need it. The best proposals—and reports—will be those that result from a *participatory* process: when everyone on the team has a clear understanding of what the organization promises to deliver and can contribute to the proposal and then deliver and report on the funded activities.

Terminology

It is important to understand the terminology that follows because:

- Funders use these terms and expect us to understand and use them;
- They help us structure or provide a framework for our proposals and work.

Note that different funders may use these terms in overlapping or different ways (e.g., some funders may use "goals" or "outcomes" to mean "impact"; others may use "impact" interchangeably with "results"). If you are unsure of how a particular funder is using a specific term, it may be appropriate to ask them for clarification. This can also be an important step in the relationship-building process (more on that later!).

General Terms

ACTIVITIES are what you plan to *do* to achieve the programmatic or project goals. Activities discuss actions, but not outcomes or impact. Activities could be "organize trainings" or "serve breakfast to school children" or "produce a training manual."

CASE STATEMENT[1] is a document that marshals, or gathers together, the facts and makes a compelling statement of need for your organization or program, as well as how you will address the need. It includes the organization's or program's projected activities, outputs, outcomes, timeline, budget, and other information. Gathering all the information you need *before* you need it will enable you to write more and better proposals and to respond quickly to funders' Requests for Proposals.

[1] Please see Session III and the Resources section for more about case statements.

EVALUATION is the systemic assessment of the effectiveness and/or impact of an organization, program, or activity.[2] Evaluation generally takes place *after* a program or activity is completed. Evaluation is easier to do if you do a pre-program assessment (to gauge participants' attitudes or behaviors before the activity begins) and post-program assessment (to gauge the change in participants' attitudes or behaviors that resulted from the program).

LETTER OF INQUIRY (LOI) is a preliminary document (usually two pages at most) that funders often require before they will accept a full proposal. The LOI is *as* important or even *more* important than a proposal – if the LOI isn't compelling enough to engage and intrigue the funder, then they won't go on to the next step – requesting or accepting a full proposal from you.

MONITORING is the ongoing surveillance and review of program implementation and performance, usually tracking key inputs, activities, and outputs on a regular basis. Monitoring takes place while a program or activity is being implemented. Monitoring can also provide data that may be useful in evaluating the program's overall performance (see EVALUATION above).

REQUEST FOR PROPOSAL (RFP) is an indication that a funder is open to accepting proposals, usually for specified activities. The RFP can be an actual document that the funder distributes or just a short description on its website. Sometimes funders will issue an RFP with a very short timeframe (the U.S. government, for example, will sometimes issue an RFP with a deadline just a few weeks later), so gathering your project information ahead of time (in a Case Statement) is essential in being able to respond quickly with a winning proposal. In Europe, RFPs are sometimes called "Calls for Tenders."

Proposal- or Report-Specific Terms[3]

INPUTS are financial and other resources which the organization translates into specified activities.
To determine what these are, ask yourself questions such as: What staff will be involved in carrying out these activities? What funds or other resources will your organization commit to the project? What other organizations will be involved in carrying out the activities? What tools (manuals, films, etc.) will we need to implement the activities?

OBJECTIVES/STRATEGIES are what you will <u>*do*</u> (activities/program) to achieve your outcomes and goals.
To determine what these are, ask yourself questions such as: What activities are we going to carry out (Publications? Trainings? Meetings? Other activities?)? What programs or activities will we implement and how?

GOALS are what you want to <u>*achieve*</u> (not what you want to <u>do</u> – those are <u>activities</u>) through the program or activity. Without a clear vision of what the program or project hopes to achieve, it will be difficult to clearly define the program's results.
To determine what these are, ask yourself questions such as: Why are we working on this problem? When this project is finished, what will success look like?

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[2] *Measuring Change: Monitoring and Evaluating Leadership Programs* (the WLP evaluation manual, available free online at www.learningpartnership.org) can be used to help you evaluate the impact of your program. *Measuring Change* is based on evaluation criteria that funders often require and uses their terminology (e.g., outputs, outcomes, monitoring, evaluation, Theory of Change, qualitative vs. quantitative analysis, etc.).
[3] Definitions of these terms are based on WLP's *Measuring Change*, United Nations Development Programme (UNDP), and other sources.

OUTPUTS are the *quantifiable*, easy-to-obtain, and immediate results, products, goods, or services of program activities, such as the number of people trained, number of training programs held, number of people the Training of Trainers Institute participants subsequently trained, number of films or manuals produced, number of people who viewed the films or used the manuals, etc.
To determine what these are, ask yourself questions such as: What do we or other stakeholders need to produce, provide, or deliver through the proposed project or program for us to achieve our short- to medium-term results? How many people do we project that we will involve or affect?

OUTCOMES[4] are *qualitative* changes that can be clearly or directly linked to a program. They normally relate to changes in institutional performance or in behavior among individuals or groups. An outcome is a behavioral change - changes in the practices, actions, and relationships of the people, groups and organizations (someone doing something different) because of your activity. Outcomes may also include terms such as positive or immediate results or short- or medium-term results or impact.
To determine what these are, ask yourself questions such as: What are the most immediate things we are trying to change (or that changed)? What are the changes that must happen before we can achieve our goals and have a long-term impact? What are the changes that happened because of the project outputs? What changed in the individuals' behavior that is directly related to the project? You can often get this information by surveying participants both before and after the activity.

RESULTS are the reaction to an activity or action. They are sometimes defined as "The output, outcome or impact (intended or unintended, positive and/or negative) of a development intervention."[5]
To determine what these are, ask yourself questions such as: What changed as a direct result of our activity?

IMPACT is the longer-term change that happened because of the program or activity. Impacts generally capture more permanent changes in people's lives. Impact is often defined as a sustainable change after the activity or intervention is over (a *change in society*). Impact may also include terms such as long-term outcomes or results. Impacts are normally formulated to communicate substantial and direct changes in these conditions over the long term – such as reduction in poverty or improvements in people's health and welfare, environmental conditions, political participation, or governance. Impact is generally a describable or measurable development change resulting from a cause-and-effect relationship.
To determine what these are, ask yourself questions such as: What is the longer-term change we envision that is a direct result of our activity? How have people's lives changed or improved because of our program?

An example of these terms is how we look at breakfast:

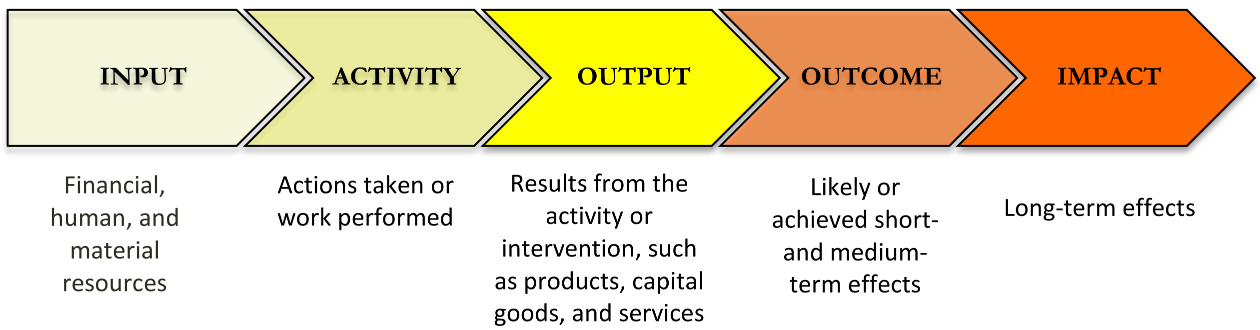
- Good bread and cheese are **inputs.**
- Taking breakfast is an **activity / process.**
- One stomach filled up is **output.**
- Sufficient calorie intake is **outcome**.
- Sufficient energy to do your daily work is **impact.**

[4] See the Resources section for related articles on measuring outcomes.
[5] See Organisation for Economic Co-operation and Development, *Glossary of Key Terms in Evaluation and Results Based Management,* http://www.oecd.org/development/peer-reviews/2754804.pdf for additional definitions of this and other related terms.

For a WLP Training of Trainers Institute, this would be:

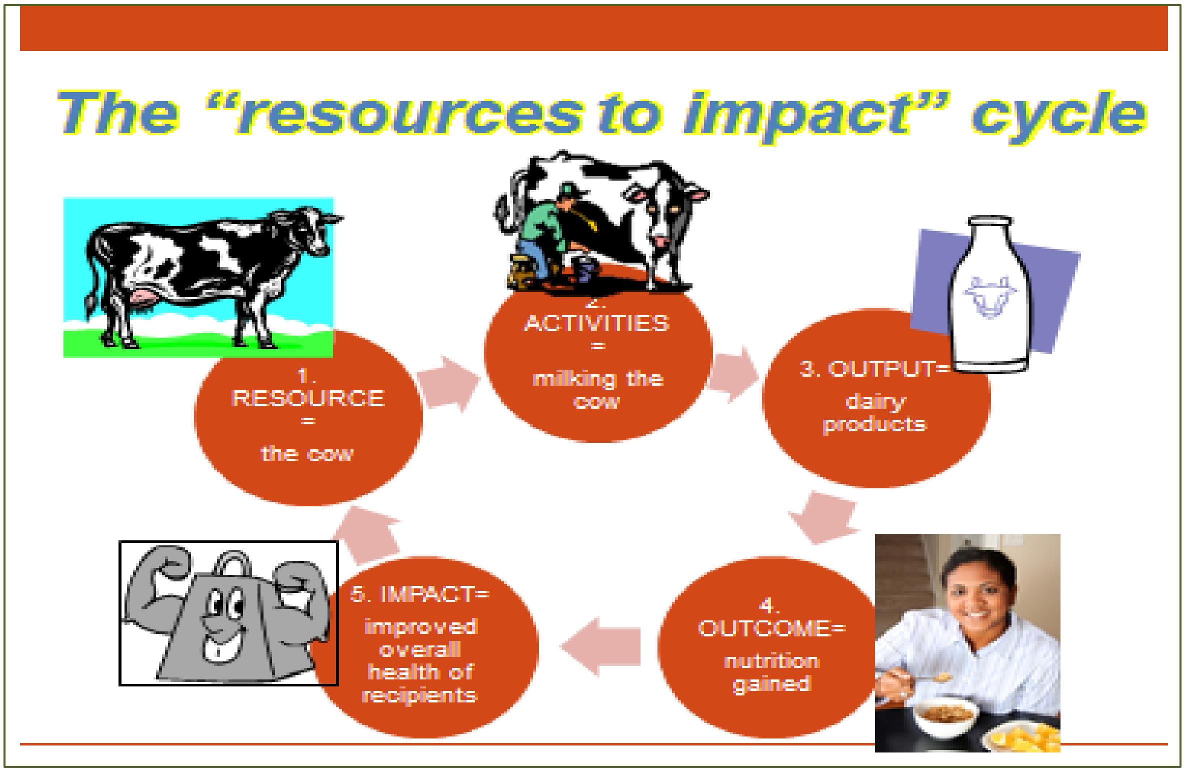
- Trainers, a venue, and training resources (manuals, films, and other tools) would be **inputs**.
- The training would be the **activity**.
- Fifteen women qualified to act as trainers to others would be the **output**.
- Those trainers conducting subsequent trainings for other organizations and women who then engage as active citizens, assume leadership in their communities, increase their political participation, and become activists committed to strengthening women's rights would be an **outcome**.
- Changes or reforms in national laws to strengthen women's rights would be **impacts**.

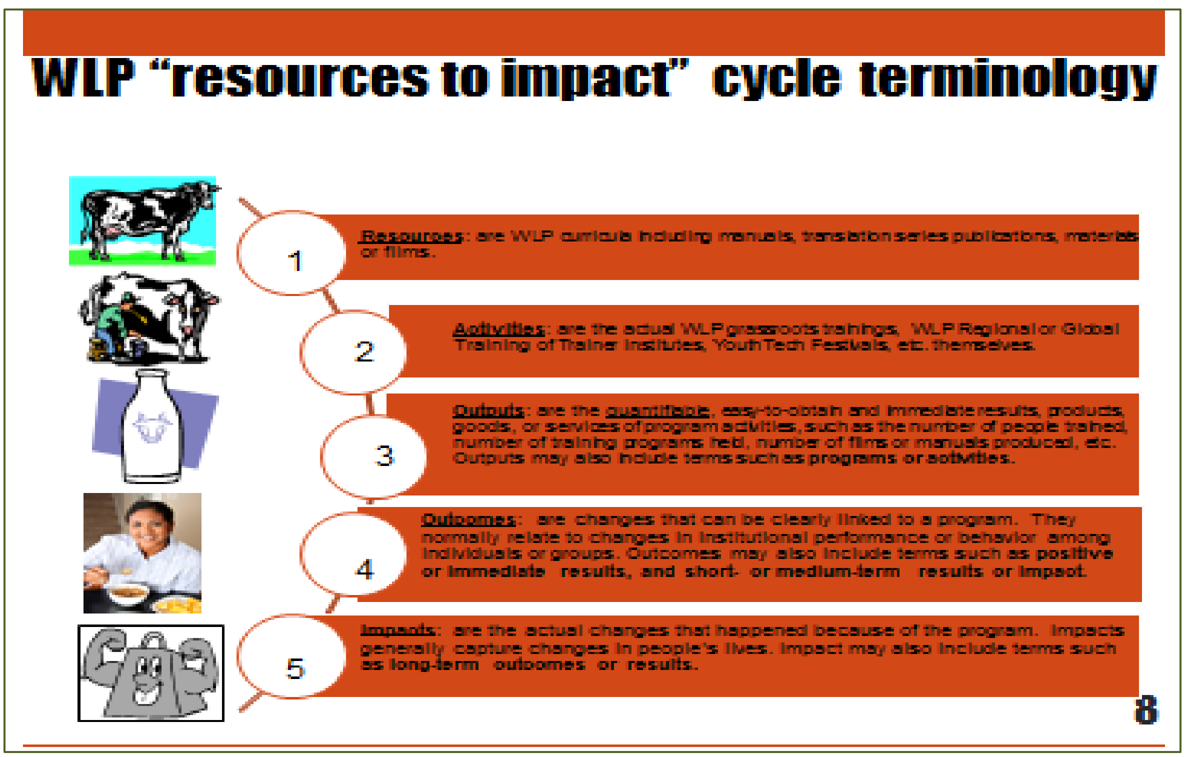
This "Results Chain"[6] shows the relationship of some of the terms above:



[6] We are grateful to Jessica Rothman of Indevelop for the use of this illustration.

The terms can also be illustrated in the following:





Section 1 - Session I: Identifying and Researching Funders

"Luck is what happens when preparation meets opportunity."

Seneca
Roman philosopher and politician

Session I: Identifying and Researching Funders7

Outline

- How do we identify potential funders?
- What are some good tools for researching prospects?
- Q&A Session

Introduction

Finding funding partners is critical to obtaining ongoing financial support to sustain your programs. But how do you find prospective funders? How do you know if they will fund your work? Where are the best places to find information about the hundreds—if not thousands—of foundations that fund programs all over the world?

In this session, we'll provide an overview of some of the most commonly used tools and resources to help you identify prospective funding partners.

Learning Objectives

- To learn about where and how to research prospective funders
- To become familiar with some of the most commonly used research tools
- To learn about other ways to connect with funders—online and offline

Notes, Remarks/Reminders for the Facilitator

- Greet and welcome the participants and training support team. It is a good idea to chat or converse with participants before the training session begins: this allows participants to continue to get comfortable with the technology, eliminates 'dead air' and allows you to address any outstanding questions that participants may have before launching into the next session. Also consider starting with an ice-breaker activity. This can help participants feel at ease and also smooth the start of the session while some participants are either logging in late or addressing technical issues.
- Remind participants this is a safe and open forum for everybody and invite/encourage them to participate by asking questions, sharing experiences, etc.
- Ask questions as you go along, to make sure the concepts are understood.

[7] Please note that this toolkit focuses mainly on researching and identifying U.S.-based (though not necessarily U.S.-focused) private and public foundations as well as governmental or NGO agencies, not corporate foundations or corporate giving entities, although many of the toolkit's concepts may apply to corporations as well. For information about corporate donations, you can use NOZA (https://www.nozasearch.com/), a fee-based subscription service with a searchable database on corporations and their giving. For information about grants available through the EU, go to http://ec.europa.eu/contracts_grants/index_en.htm.

- Take pauses and breaks often, to make sure participants are following along and not falling behind, and to give space for participants' questions, comments, and experiences they may want to share.
- Provide examples whenever possible. It may be helpful to use a Share Screen tool in the online learning platform and walk participants through some of the basics of the sites you are reviewing for this session. Alternatively, you might share the URL with participants using the Chat function, encourage everyone to navigate to the site together, and walk people through the site virtually.

Online Research

Aside from doing a basic Google search for funders whose name you know or that you know are giving to organizations like yours or in your geographic area, there are several online databases you can use to identify and research funders that are making grants to non-profit organizations like yours.

The Foundation Center (http://foundationcenter.org/) has an online database of public and private foundations in the U.S., as well as many other useful resources for fundraising and proposal writing. If you know the name of the foundation you are interested in, you can research basic information (the foundation's address, contact information, website, assets, total giving, links to their IRS filings,[8] background, purpose, and fields of interest) without charge (look for their "Funder Data: Foundation Directory Online *FREE*" heading).

The Foundation Center has a tutorial (http://foundationcenter.org/getstarted/newvisitors/) that will guide you in using its website, if you are unfamiliar with how it works.

If you don't know the names of the foundations you might be interested in (that is – if you want to discover additional foundations that might support your organization), or if you want more detailed information about any foundation, you can access this through the Foundation Center's paid service (https://fconline.foundationcenter.org/). For most purposes, using their Plus $29.95 or Premium $59.95 level[9] will be sufficient, and you can usually do all the research you need to do within one month (so that you can sign up for a one-month plan, not annual). These levels will give you access to their grants database and grant recipient information, so that you can identify and then research foundations in several ways, by: geographic giving (to find foundations that make grants in your country or city), type of grant (capital, operating, program), interest area (e.g., human rights, health and human services, democracy, etc.),[10] or target groups (e.g., women, minorities, youth, etc.). At these paid levels you can also access information about grants received by other organizations that are similar to yours (e.g., by geography, interest area, the organization's name, etc.).

However, you can access the Foundation Center's online database for free, if you visit one of their Funding Information Network locations (http://grantspace.org/find-us). Most of these locations are around the U.S., but they do have some international locations.

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[8] The organization's annual IRS filings (commonly called the 990 or 990-PF form) provide useful information about the foundation, including address, contact information, assets, total giving, a list of every grant given that year, board members, and often their guidelines and other pertinent information.

[9] Foundation Center prices, July 2014. Their highest subscription level (Professional, at $179.95 per month) will allow you additional access to corporate giving information.

[10] See the Resources section for a sample Foundation Center report based on a search by Interest Area.

The Foundation Center also has a new feature, Glass Pockets (http://glasspockets.org/glasspockets-gallery/who-has-glass-pockets) which has profiles, links to, and grants lists from some of the largest U.S. foundations (including ones that support international NGOs).

Guidestar (http://www.guidestar.org/) has free and paid sections of its website, like the Foundation Center. The free section requires you to create an account, which allows you to then access information about foundations by name or location. Their Premium service provides greater search, analysis, and aggregation tools; however, you can access similar information through the Foundation Center at a lower per-month cost.

GrantStation (https://www.grantstation.com/) also has free and paid sections of its website. For no fee, you can subscribe to their monthly newsletter, the *GrantStation International Insider*, which has grant announcements for NGO and nonprofit organizations working internationally. If you become a paid member, you can access additional services, such as searching their database and grantmakers' profiles, as well as attending online grants-related webinars.

The U.S. Internal Revenue Service (IRS) (http://www.irs.gov/Charities-&-Non-Profits/Exempt-Organizations-Select-Check) provides a database of IRS filings from most U.S. charitable foundations. As with the Foundation Center's free database, searching on this database requires that you know the name or location of the foundation for which you want information.

Grants.gov (http://www.grants.gov/web/grants/home.html) is the U.S. government's database of its current RFPs. You can use this site to search by the date the opportunity opened, categories (e.g., health, community development, etc.), agency (e.g., Department of State, USAID, etc.), or eligibility (e.g., non-profit organizations, for-profit organizations, higher education, etc.).

Unfortunately, there is no tutorial to show you how to use the grants.gov site, but their "Search Grants" tab (http://www.grants.gov/web/grants/search-grants.html) is relatively simple to use.

A few words of caution:

- If you want to apply for a grant from the U.S. government, you will need to register on grants.gov first. The registration process can be complicated and take weeks, so complete this registration early, well before the deadline date.[11]
- If you decide to submit a proposal via grants.gov (which is the main way to apply for a grant from the U.S. government), it's a good idea to upload your information and required documents *at least* one day prior to the deadline. The site has been known to crash, and if your application finishes uploading even one minute past the deadline, the site will not accept it.
- If you have not previously received a grant from the U.S. government, you should be aware that you will have to spend a significant amount of effort and time in record-keeping and reporting, should you receive a grant. You may want to include in the budget funds for a consultant or a part-time person to help you meet the grant's reporting requirements.

USAID (http://www.usaid.gov/partnerships) also lists its current RFPs and funding opportunities on its website.

[11] See the afpnet.org articles in the Resources section for detailed information about registering for U.S. government grants.

Michigan State University's online list of international and foreign grant makers (http://staff.lib.msu.edu/harris23/grants/privint.htm) provides links to a significant number of governmental agencies, corporations, and foundations that make grants internationally (although some of the links are out-of-date).

Other Organizations

You can check the websites or publications of other similar organizations in your country or region to see if they state who is funding them. Again, if you subscribe to one of the Foundation Center's levels of paid service, you can search the Center's grants database and grant recipient information (search by the other organizations' names) to determine which foundations are giving to organizations similar to yours.

Another way to do this is to search through the Annual Reports of organizations that may be similar to yours (in geographic or thematic focus) or organizations that may be 'competitors.' Annual reports often list an organization's financial and in-kind supporters, sometimes even listed by program.

Networking

Often networking with others who work for organizations that are similar to yours is helpful, if they are willing to share information. Also, going to conferences and other events can give you the opportunity to meet with staff from other similar organizations and find out which funders are supporting them or interested in your organization's priorities.

As Pallavi Gupta of Asmita Resource Centre for Women[12] noted,[13] discussing potential collaborations with other organizations is also a good way to achieve your objectives efficiently as well as to introduce your organization to new funders.

Social Media

If you know the name of the funder you are interested in, you can follow them on social media, so you can see what they are interested in by taking special note of their updates, events, and other activities and information they share. The funder may also use social media to announce its upcoming priorities or alert followers to changes in its grantmaking, new grant opportunities, RFPs, etc.

Using your own organization's social media pages to post information about an innovative program you are doing is a good way to provide ongoing updates about your work and impact to any current funders that may be following you, as well as pique the interest of potential funders. For example, when WLP staff posted information about an upcoming online training on the *ABAN* Facebook page, WLP was contacted by a potential funder! Srinidhi Raghavan[14] of Asmita Resource Centre for Women also noted that they have been able to find prospective partners through interactions on Twitter and retweeting (RTing) the information relevant to both organizations. Don't forget that posting videos of the impact of your work on YouTube is a great way to show funders the results of their support, thank them for their grant, and reach new potential supporters.

[12] Asmita Resource Centre for Women, an NGO based in Securandabad, India, is a frequent partner of Women's Learning Partnership.
[13] Comments made during *Writing Grant Proposals,* WLP Online Training, June 2014.
[14] Comments made during *Writing Grant Proposals,* WLP Online Training, June 2014.

Tracking
Once you have researched possible funders and prioritized them (based on how well your organization and/or project fit their guidelines), it's helpful to create a database using Excel or some other searchable software to document what grants you want to apply for, the results of the application, the deadline, and other factors that may be relevant.

Questions and Answers
Take a moment to review the learning objectives with the facilitator and other participants. Do you have any outstanding questions or comments to share with the group?

Additional Reading
On your own, take some time to review the websites we discussed in this session as well as those in the Resources section. Look at Appendix 6 for a sample of results from a Foundation Center search. If you have suggestions for other resources, share them with the group.

Section 1 - Session II: Strategizing

Session II: Strategizing

Outline

- ➢ What goes into your strategy?
- ➢ Looking at funder priorities and your programs
- ➢ Mission drift

Introduction

Now that you've identified some potential funders, how do you gain their support? It's time to take all that information you learned about them when doing your research and put it to work. This session will help you understand how to create a strategy for approaching a prospective—or existing—funder that will ensure that your programs are aligned with the priorities of the funder you are targeting. You will also understand how much to reasonably ask for, and when you might actually want to say *no* to a potential funder.

Learning Objectives

- Creating a strategy for reaching out to a funding prospect
- Understanding what funders *say* they fund, and how to find out what they *actually* fund
- Understanding programmatic alignment
- Determining how much support to ask for, and for which program or activity
- Knowing the difference between finding a strategic funding partner to support your programs vs. changing your programs just to secure a new funding partner

Notes, Remarks/Reminders for the Facilitator

- Start by encouraging participants to share any outstanding questions or comments from the previous session
- You may wish to start things off with an ice-breaker, to continue to encourage the participants to become comfortable sharing with each other
- Present the topic of the learning session
- Encourage participants to take part by asking questions, sharing experiences, etc.
- Ask questions as you go along, to make sure the main concepts are understood
- Provide examples and encourage discussion whenever possible.
- For this session, you may want to identify one or two funders in advance, go through their websites and other online resources (such as their annual report), discuss what each funder states as its priorities, and look at what their funding trends have been
- Engage the participants. If you choose to look at specific funders, you might want to poll the participants to see if they think that their programs are aligned with the funders you have chosen. You can lead an interactive discussion about why—and perhaps why not.

Strategizing for Success

The next step in proposal writing is *strategizing*. Take the information you gathered through researching the funder's website, annual report, IRS filings, social media, and other data to determine the funder's guidelines, restrictions, and priorities:

- What does the funder <u>say</u> they fund? *This may be different from what they actually <u>do</u> fund.*

- What types of support (operating,[15] program, capital, equipment) do they make grants for?
- What themes or topics (combatting violence against women, promoting women's political or economic empowerment, democracy, etc.) do they say they are interested in?

- What do they <u>*actually*</u> fund? *Look at the grants they have they made over the last few years to determine this.*

- What are their typical grant amounts and how many grants do they give out each year? *This tells you how much you might want to ask for and also the likelihood of receiving a grant – if they give out only a very few, very large grants each year, you will need to make a strong connection with them before applying.*

- Are most of their grants to a few large organizations or are they to several smaller grassroots organizations? *That tells you if your organization is the type of grantee they usually fund.*

- What are the funder's priorities? *Targeting the root causes of problems? Direct grassroots services? Research? High-level policy changes?*

- How do the funder's themes and priorities align with those of your organization or with what you want to propose to the funder? *Remember – what's most important in matching these is <u>what the funder wants to fund</u>, not what you need funding for, since the funder is the one making the decision.*

Before proceeding, ask yourself the following questions:

- How does your proposal align with the type of projects that the funder says it wants to fund or has been funding?
- Does what you want to propose fall within the funder's geographical and other limitations?
- Does your proposal fit within the funder's mission and prior grant practices?
- What are the funder's timeline and deadlines?

Use what you learned from your research and your answers to all of the above questions to **strategize** and decide on which of your priority projects most closely connects with the <u>funder's</u> priorities, how to approach the funder (via e-mail, online, letter, personal, phone call, board connection, shared social media connections), for what amount, and when.

One last caveat – make sure that the project you propose is a priority for your organization. Beware of *mission drift* – of applying for a grant simply because the RFP opportunity is there, even though the project may not really align with your organization's mission or priorities. It's best to submit proposals for programs that align naturally with the prospective funder's priorities—NOT to change your programs or your organization's mission just to make them more attractive to a funder.

Questions and Answers

Take a moment to review the learning objectives with the facilitator and other participants. Do you have any outstanding questions or comments to share with the group?

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[15] It's almost always easier to get funds to support a <u>program</u> than it is to get funds to support an organization's general operating (or "core") expenses. Very often funders will only make grants for operating expenses if they know your organization well and have good reason to believe you will do what you say you will do.

Additional Reading

On your own, take some time to review the websites of some potential or current funders for your organization, as well as some of the websites and publications in the Resources section. Review funders' annual reports and other materials. Get a sense as to what they are likely to fund and how your programs fit in with their priorities and funding history.

Section 1 - Session III: Writing Compelling, Professional, Informative & Transparent Proposals

Session III: Writing Compelling, Professional, Informative & Transparent Proposals

Outline

- Determining what information you need to include in the proposal
- Elements of a compelling case statement
- Planning and organization
- Pulling all the components together

Introduction

Once you've identified a potential funder and you have a strategy for what you'd like to propose to them, now comes the hard part. How do you pull all this information and strategy together into a compelling proposal? In this session, we'll cover how to determine what you need to include in your proposal. After you decide that, you can begin to create a plan and proposal calendar. We'll also discuss how to talk about your programs in an honest but compelling way and using the funder's own language and terminology.

Learning Objectives

- To identify what organizational and programmatic information you need to include in your proposal, and what you *don't* need to include
- The components of a compelling case statement
- The importance of tailoring your proposal to each funder
- How to stay organized and create a plan and a calendar
- Understanding the funder's terminology and specifications, and writing your proposal to fit them
- The importance of using data, facts, and context
- What kinds of human stories to include
- Pulling it all together

Notes, Remarks/Reminders for the Facilitator

- Present the topic of the learning session.
- Encourage participants to take part by asking questions, sharing experiences, etc.
- Ask participants questions, to make sure the main concepts are understood.
- Provide examples whenever possible.

Gathering the Information Needed

As we mentioned above, it's helpful to have gathered the information you need to construct a Case Statement for your organization and for each of your organization's priority programs (and to update that information as needed). You may have already gathered all this information in a previous proposal that was very comprehensive. If you haven't done so already, then:

- Gather the information you need about your organization, priority project, accomplishments, or results (see below) – before you begin writing the proposal.

- Put this information into a "Case Statement" that you can modify as needed for each topic or project (and for future proposals).[16]
- Pull together a file (in both electronic and hard copy format) of standard attachments that funders may require (your organization's legal incorporation letter, current balance sheet, current fiscal year operating budget, most recent audited financial report, résumés of your executive director and project staff, Board of Directors list, list of major funders, strategic plan, list of current funders, annual report, etc.).

The **Case Statement** for your organization or priority project should include:

> "Foundations are not in the business of giving away money. They are funding partners, investors, and venture capitalists supporting projects that have a high potential to pay off and have the greatest impact on society."
> M. J. Murdock Charitable Trust
> *Great Giving*

- Your organization's basic information (history, mission, scope, why it started, when it started).
- Why is this project (or your organization) important? **What critical community need does it meet?** Show that you have researched the need or issue you will be addressing and that your organization is an issue expert in this area.
- How will your organization or the project **directly address** the important community need?
- Whom will your organization or this project benefit or serve? What types of groups (include *demographics* – women/men, rural/urban, youth/adults, minorities)?
- How many people will your organization or the project benefit or serve? *(Outputs)*
- How do you plan to implement the project? *(Strategies or Activities)*
- Have those who will be affected had any input into the project design? *(How inclusive has your organization been in designing the intervention?)*
- What is your organization's or the proposed project's goal?
- What will a grant from this funder enable you to do? Focus on what the project will ***accomplish*** *(Outcomes).* What change are you looking to accomplish with this grant or project?
- Are there others in your community providing similar services or programs? If so, how is your organization different? How are you collaborating with others?
- Why is your organization the best one to carry out this project?
- How do your organization's results compare with those of others?
- Is this program new or has it been going on for some time? If it has happened in the past, how has it been funded before this?
- How will your organization, this work, or the project be sustained *after* this grant is finished? Is the work replicable on a larger scale?
- How will you monitor, evaluate, and/or share your results? How do you plan to learn from this project and how will you use that knowledge?

[16] See the Standard Information for a Case Statement and Writing Samples in the Resources section of this toolkit for additional information.

- Why you are applying to this particular funder for support for this project (*How does the project you propose help the funder meet its goals?*)?
- Fundraising Plan *(How do you plan to secure all the funds needed for this project?)*
- Donor Recognition Opportunities *(How will you recognize or acknowledge the funder's support?)*
- Project Timeline *(This could be a table with columns for Activity / Timeline / Responsibility.)*[17]
- Logic Model or Activity Plan[18]
- Project Budget[19] *(This should relate clearly to the activities described in the proposal and include all project-related costs, including reporting.)*

You may not need all this information for every proposal you write, but having it on hand, in an approved, written format will ensure that you can respond quickly to RFPs and that you can submit more and better prepared proposals.

One size does not fit all! It is important to remember, a Case Statement is not a "boilerplate" that you should simply submit to *all* funders. Successful proposals are ones that are tailored specifically to the requirements, interests, and priorities of each potential funder.

Writing the Proposal

Set up a calendar

- Put all the proposal deadlines on a calendar or Excel spreadsheet, work on the proposals well in advance, and submit them *before* they are due.[20]

Target the funder's themes and goals.

- Some funders are focused on themes, such as combatting violence against women or promoting democracy. When you write a proposal to them, you should talk about **your work that directly targets that theme**. **Show the funder** how your project will help them achieve *their* goals (be specific).

Follow the funder's specifications (e.g., on what to include, word or space limitations).

- Funders often specify requirements for length, format, margins, font size, etc. Increasingly funders are using online applications, which often have very restricted character space limitations.[21] You can use an online website (such as Character Count –

[17] See Sample Project Timeline in the Resources section.
[18] See the link to Finland's Logical Framework Approach in the Resources section of this toolkit. The Logic Model usually asks you to define your Activities, Goals, Risks, and Assumptions. An Activity Plan can be a chart with columns headed: Activity, Goals, Outputs, Outcomes, and Impact. Different funders may use different types of assessment frameworks, so be sure that you understand what the funder is going to want when it comes to reporting and assessing results, impact, and planning.
[19] See WLP's *Capacity Building Toolkit: Budgeting and Financial Systems: Project and Organizational Budgeting Processes* by Maria del Carmen Sahonero, for more information about budgets.
[20] See the "How to Plan Backwards for Reporting" illustration in the next section; you can modify this easily for proposals.
[21] For online applications, it can be helpful to first download the funder's form into Word and answer all of the questions, then cut and paste your narrative or other information into the fields provided, after you have ensured that you have included the most important information yet kept within the space limitations. Using Word, you can

http://www.charactercountonline.com/) or if you are using Word, you can check the character count by going to File, Info, Properties, Advanced Properties, Statistics (or depending on what version of Word you are using, that information may be accessible via a button at the lower left of your screen.
- Some funders require information about outputs, analysis, and/or outcomes and specify *how* they want that information presented (e.g., in bullet points, narrative, etc.). Be sure you follow their directions or specifications.

Make it easy for the funder to see that you have responded to all their requirements and answered all their questions.
- Very often funders will stipulate information they require or questions that they want you to answer. A good way to show you have addressed all the points outlined in the funder's guidelines or proposal requirements is to list the funder's specifications and answer them one-by-one, point-by-point, in the order given (even include the question number, if available).[22]

If the RFP specifies that you include an Executive Summary, write a short description of the most important points in the proposal. Or if they ask you to include a cover letter, it should be a brief (one page) summary of the project's issues, content, and significance.

Marshal your facts.
- Show that you have researched the issue or need.
- Include both *outputs* and *outcomes*.
- **Highlight the "So what?" factor.** It's important to understand and describe the ***outcomes*** of your work. What does the project mean for women? For society? Short-term? Long-term? If you provided training to help women claim their political rights, *did the women in fact actually claim their political rights*? If so, how? Can you describe what they did, how they felt, what they saw? Ask the facilitators or participants – ***Why*** was this training important to your organization or to you? ***How*** did this program change your life?

> A participant in a recent WLP Afghanistan workshop described how, as a result of the workshop, she took action to support a neighbor – a young teacher whose husband's family would no longer allow her to leave the house: *"During this workshop I went to her house and I talked with her family and with her mother-in-law. I helped her gain permission and now she has returned to her work again and they are happy."*

Use the "4 Cs" in describing your organization and/or the project: Be clear, consistent, concise, and creative.
- Write your proposal in a way that's **strong, clear, concise,** and **easy to read.**
- Make a **very clear connection** between your action and the funder's goals. The proposal does not have to be long (in fact, shorter is usually better) – it needs to have **clarity** and **focus**.
- Include a statement that very **clearly shows** the funder, *"By doing these activities, we will help you achieve your goals."*
- **Less is more!** Funders do not judge your proposal based on weight. Be as concise as you can.

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easily check your character space count. Most online applications count the number of characters *with spaces* (including periods, indents, etc.) and will not let you upload more than the allowed number of characters – so watch your character count for online applications!

[22] See Writing Samples in the Resources section.

> *"Now that I know there is a law for protection from domestic violence in Jordan, I will be able to defend myself and my sisters because we all experience violence at home and we don't tell anyone."*
> WLP Jordan/SIGI/J workshop participant

Make your project or need *compelling*.

- **Provide a compelling, human story.**[23] Describe how "This woman lived in this situation before, here is how she changed (and why), and this is what she is doing now."
- **Include diverse voices.** Funders like to hear from people whose lives were affected by your work, so ask facilitators or your people in the field to report to you at least one story or anecdote after a workshop or other program activity (you can often just insert these in textboxes or include them as quotes). You can also include what is being said in the community (or in the news) about your organization.

Tell the truth. Don't exaggerate.

- **Be truthful about what you can and cannot do** – what you are strong or weak in, what help you might need, and what you can achieve. Assert your identity as an organization with an agenda and objective. Present your programs as a strong investment for the funder, and describe how the work you and your team will do will provide a good return on that investment (ROI). Avoid appearing desperate or insecure: you are seeking to *partner* with the funder, not begging from them.
- For outputs and outcomes, it's best to **under-promise** and **over-deliver**, so you can report to the funder that you had greater success than you projected (which is better than reporting that you didn't meet your goals!).

Use the funder's own language.

- For example, if the funder uses the **terminology** "gender-based violence" instead of "violence against women," use "gender-based violence" in your proposal or report. Look on their website or in their publications for the terminology the funder uses, and use it.
- **Don't use jargon** – don't expect the funder to know all the specialized terminology used in your field. Use only terms that an educated lay person will readily understand.
- **Don't use too many acronyms**. You can abbreviate your organization's name (e.g., WLP for Women's Learning Partnership) and use acronyms that are in common usage (e.g., NGO for non-governmental organization) after the first mention if you need to, but it's best not to expect the funder to follow and remember a substantial number of other acronyms. However, if the funder uses the acronym on their website or in their publications, then it's probably safe to use it in your proposal.

Be precise about details.

- **Secure the events in a specific place** – include the names of towns or villages, and describe the types of people who participated. Put your activities in context – for example, funders might want to know if participants might have to travel far to reach the trainings. You might not have space to include all this information in every proposal, but it may be helpful to include, when you do have space.
- For some programs, there may be security concerns around providing too many details. If your organization is working with vulnerable populations where there might be risks to participants'

[23] WLP provides online trainings on topics including how to effectively communicate stories about your organization and its impact. You can learn more about upcoming online trainings by visiting WLP's Online Learning Platform, *ABAN*, at www.abanlearning.org.

or beneficiaries' safety or security, you can explain this to the funder and avoid providing details that may cause your constituents to feel unsafe.

Include relevant events and context.

- Put relevant activities into the context of what you are doing and what's happening overall: e.g., if you are holding a training during times of political turmoil, talk about how those conditions might affect your work or the outcomes of the training. For example, if your organization is based in Istanbul, funders might want to know that your office is two blocks from Taksim Square and how the demonstrations there affected your work.
- If you operate under some constraints – such as no electricity after working hours, which limits when you can hold trainings, or having to pass through numerous checkpoints to carry out a training in a rural area – include that information. This puts your work in context for funders; and although the conditions may be commonplace to you, the funder may have no idea of the difficulties you operate under.

Don't include or attach attachments that are not requested.

- For example, don't send a video about your organization just because you have a good one available.
- Do have your standard attachments (e.g., your organization's legal incorporation letter, current balance sheet, fiscal year operating budget, most recent audited report, résumés of your executive director and project staff, Board of Directors list, etc.) ready in case they are required.

If you have received a grant from this funder in the past, don't simply say the same thing again in this year's application, dropping in new statistics or examples.

- **Don't take the funder for granted.** Don't send them the same proposal each year, just substituting new numbers. Even if you are doing essentially the same things as last year, rewrite what you are submitting in a new and interesting way.
- Be responsive to what funders are looking for. Send them the message that you have thought about their priorities in terms of what you are doing. For example, *ABAN*, WLP's new Online Learning Portal, is a specific response to address new opportunities that WLP has encountered.
- Check the funder's webpage and make sure that you are using the terminology that the funder is *currently* using (it may have changed since your last grant).

Compare data (this year vs. last).

- For example, have the numbers of women participating in your workshops increased or decreased vs. last year or previous years or vs. what you anticipated? If so, why? If the proposed training is for grassroots women, will this be the first type of this training they ever had? What might it mean to their community? For example, WLP Lebanon/CRTD-A did the first-ever gender audit of a ministry, at the request of the Lebanese government – this was very important! Or, if you served 100 women two years ago and last year you served 150, it's important to state that you increased the number of women you served by 50% – that puts the success of your program in context for the funder.

Use the active voice.

- Take credit for your work! It's always more interesting to the person who reviews your proposal to know exactly who was doing what. For example, which of the following sentences is more compelling?

- More than a hundred rural women were trained last year.
- Last year, we trained more than a hundred rural women.

Use Spell-Check – then check again!

- How your proposal *appears* tells the funder how professional your organization is. If the proposal contains many misspellings, it will look like you didn't take the time and effort to prepare a good proposal. So use your computer's spell-check feature – and then check your proposal again to make sure spell-check didn't change anything it shouldn't have.
- You can also use a website such as Grammarly (https://www.grammarly.com/1) to help check your English. Grammarly has free and paid memberships; the free English grammar checking is usually sufficient for most purposes.

Make sure the proposal's format looks uniform.

- Check that you are consistent throughout the proposal in type font and size, margins, left-justified vs. left/right justified, line spacing, etc. A uniform, attractively presented proposal will let the funder know that your organization is professional.

Read what you've written several times, over different days.

- Take a break after you've written the first draft, then go back at least a day later and re-read what you wrote with fresh eyes. You'll be surprised at what you may want to change!

Have the proposal and budget vetted as needed within your organization.

- Distribute the draft proposal to your executive director, the relevant program director, and your financial staff, to make sure what you are proposing includes all the vital and correct information.

Enlist editors (from inside and outside your organization)

- Ask someone who is familiar with your organization and someone who is not to read your proposal – and make sure they know that you *want* their constructive criticism. We want the harshest critics to weigh in *before* we send out the proposal to the funder!

Finally:

- **Engage in good "donor stewardship"** – keep the funder informed of what you are doing, not only when the formal report is due or when you are submitting the next proposal (for example, if you share information your Board members about what you are doing in the field, they sometimes are in conversation with major funders and can share this information with them). Social media is one way to keep your constituents and supporters aware of your program activities, milestones, and achievements. Other ways may be a regular Newsletter e-mailed out or periodic check-in phone calls or e-mails with your program officer at the funding agency.

If you receive a grant (*Congratulations!*):

- *Thank the funder immediately!*
- Communicate good news about your project to the funder in between times when reports are due.
- Put the report due dates on your calendar and start working on the reports well before they are due!

- Make it easy for funders to see in your report that you accomplished what you set out to do in your proposal.

Questions and Answers

Take a moment to review the learning objectives with the facilitator and other participants. Do you have any outstanding questions or comments to share with the group?

Additional Reading

Read Appendices 1 – 5, and check out some of the publications in the Resources section.

Section 2: Writing Reports

Introduction

Fundamentals

As with writing proposals, many of the same points detailed in Section 1 are fundamental:

- **All fundraising is based on relationships**. One of the ways we strengthen that relationship is through reporting.
- **Put yourself in the mindset of the funder**. Keep in mind what the *funder* wants to see in a report, rather than what *you* think is important to tell them.
- **Preparation is key!** As with proposals, writing reports is like planning a conference – 90% of the work is in the preparation; 10% is the actual conference.
- **Putting together a successful report is the responsibility of everyone in your organization**. If we want keep a funder happy (and perhaps receive a repeat grant), we need everyone's help. Make sure that others in your organization know the specific data or types of information you need from them. If you prepare a list of your major funders and their themes and share this with others in your organization, they can more easily get you information and stories about specific themes.
- **It is easier to get a *repeat* grant than to secure a new funder.** By meeting and exceeding the funder's requirements for reports (essentially – by making the funder happy that they gave you the grant), we are more likely to secure future grants from the funder.
- **Funders are asking for increasingly more sophisticated reporting** – they are asking not just "What did you do?" but "*Why did it matter*?" Focus on your program's *outcomes* or *impact*, not just on *outputs* or *activities*.

Reports are crucial – reports are preparing the funder for your next grant proposal. In the report, we are convincing them that we helped them meet *their* goals, and thus we are encouraging them to keep funding us. We also use reports to reflect our work to the world at large and to mobilize other resources. And remember – reports may be legally required.[24]

[24] Grants are implied or legal contracts between grantors/funders, which provide the funds, and grantees/organizations that carry out the activities in a grant proposal.

Section 2 - Session I: Writing the Report

Session I: Writing the Report

Outline

- Fundamentals of fundraising
- Planning, preparation, what to include

Introduction

Writing reports may seem very similar to writing proposals—and they are similar in many ways. However, whereas in a proposal, you are stating what you propose *to do* with the funder's investment, in a report you are stating what you *have done* with that investment. Not only that, you are also reporting on *how you know* that what you did was effective, based on how you evaluated the program. Were you able to carry out all the planned activities? If not, what prevented you? Did you deliver *more* in terms of results than you proposed? How successful were your activities in meeting the overall goals of both your program *and* the funder?

In this session, we will discuss how to write compelling, straightforward reports that will help you continue to build productive, long-term, sustainable relationships with funders.

Learning Objectives

- How do reports differ from proposals?
- What to include in your report, and what not to include
- How to plan to meet funders' deadlines
- Understanding and communicating the funder's Return on Investment
- Creating a strong relationship for continued funding

Notes, Remarks/Reminders for the Facilitator

- Address any outstanding questions or comments from the previous session. Use this as an opportunity to gauge participants' comfort levels with using the tools and technology presented and navigating the various sites and other resources prevented so far.
- Present the topic of the learning session.
- Encourage participants to take part by asking questions, sharing experiences, etc.
- Ask questions of participants to make sure the main concepts are understood.
- Provide examples whenever possible.

Elements of a Report

Most of the points made in the Writing Proposals Section (Section 1) are just as valid and important for writing reports. Since many of these points overlap, we will briefly mention only the most important ones here:

Know the funder's goals and their requirements for reports. Follow the funder's specifications (e.g., on what to include, word or space limitations) and answer the funder's questions or requirements, in the order given.

Make it easy for funders to see in your report that you accomplished what you set out to do in your proposal. Have the report match the structure of the proposal you submitted, so that the funder can easily match actual project outcomes to proposed activities.

Show the funder how this project helped them achieve *their* goals (be specific). This is your opportunity to demonstrate that your work provides a good return on investment (ROI) for the funder—and may help them decide to continue to fund you!

Use the "4 Cs" in writing the report: Be clear, consistent, concise, and creative.

Include both ***outputs*** and ***outcomes***. Compare your outputs (this year vs. last).

Include **diverse voices** and **compelling human stories**.

Consider including **analysis** (why you succeeded) and **lessons learned**. What worked well and what didn't? Why? Lessons Learned are very important and some funders require that you include this information. They want to see that we are responsive to grassroots women's needs: *"We initiated the training in this way, but then we had to change for this reason."* If the information you want to present is confidential, you can disguise it (change participants' names) as needed.

Tell the truth. Don't exaggerate.

Use the funder's own language.

Be precise about details and include relevant events. Secure the events in a specific place – include the names of towns or villages, what types of people participated, what difficulties you encountered, and how you overcame them.

Talk about changes that affected the project. If you weren't able to do what you proposed (because, for example, the political situation made it difficult), say how you responded.

Remember the "So what?" factor. What did your project mean to women? To the society? Short-term? Long-term? Again, this goes back to why your organization is a good investment for the funder.

Engage in good "donor stewardship" – keep the funder informed of what you are doing, not only when the formal report is due. Communicate good news to funders in between times when reports are due. Remember – the program officer is your most important contact and that's where your first *relationship* with the funder is. The program officer makes the recommendation to her organization for you to get the grant or a repeat grant, so **strengthen that relationship** when you can.

Don't take the funders for granted. Don't send them the same report each time, just substituting new numbers.

Use *Measuring Change* (WLP's evaluation manual) or WLP's new ***Capacity Building Toolkit: Principles of Monitoring and Evaluation*** to help you evaluate the impact of your program.

Consistently strive to improve your programs. Commit your organization and team to ongoing organizational learning—what have you learned from the feedback from your programs or trainings? What have you learned from the work of other organizations? How are you using this learning to make your organization stronger?

Sometimes the results of the activities or full impact of the grant may not happen during the reporting period (the results may occur *after* the period of reporting). Be clear about that, and **add later results to later reports!** For example, it's important to note that *more than a year after* WLP Lebanon/CRTD-A's leadership training, the training's graduates went on to lead Lebanon's Nationality Campaign – make sure that your report reflects outcomes that surpass the reporting period.

Use the active voice.

Use Spell-Check – then check again!

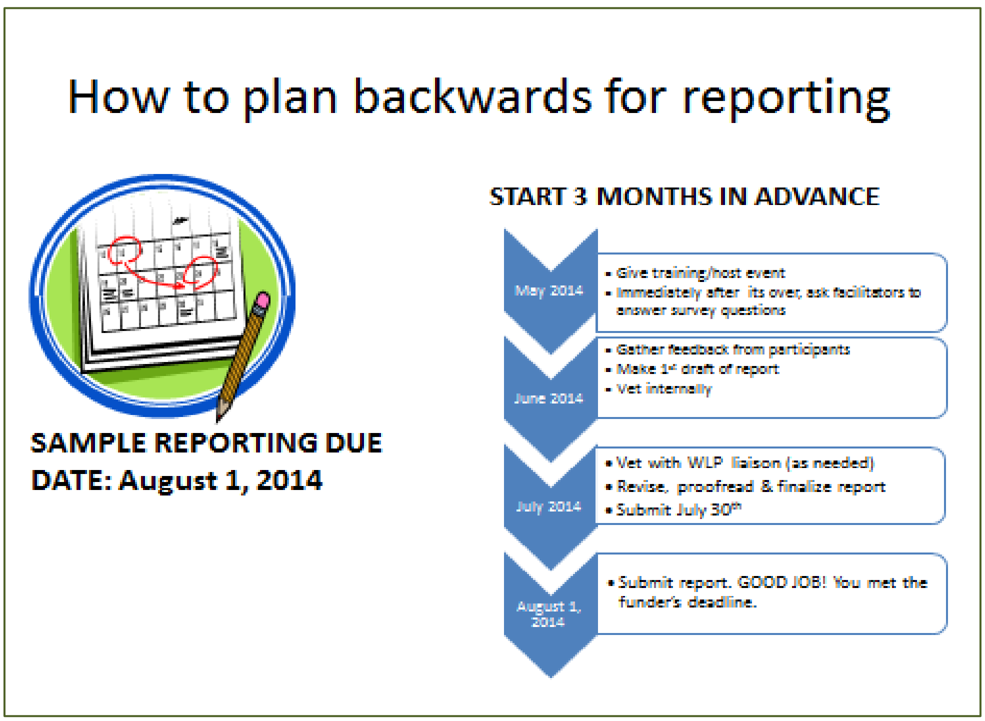
Read what you've written several times, over different days.

Enlist editors (from inside and outside your organization)

Ask your finance staff to **check the budget** or financials before you submit the report.

Don't include attachments that the funder has not requested.

Put your information in context (for example, WLP Egypt/FWID's work in the context of Tahrir Square and Egypt's new constitution; WLP Turkey/FSWW's work in the context of Taksim Square). As Pallavi Gupta of Asmita Resource Centre for Women noted,[25] "We regularly update our funders through narrative reports and also **reporting on the changing context** ... because the funder is far away and many times not too aware of the changing context."



[25] Comments made during *Writing Grant Proposals,* WLP Online Training, June 2014.

Put all the report dates on your calendar, work on the reports well in advance, and submit the reports ***before they are due!*** Aziza Abemba from WLP Zimbabwe/WSPM[26] pointed out that,[27] "If you don't report on time, there are many chances of losing credibility, no matter what would have been the hindrance."

And most of all – Thank the funder! Make sure they know that their grant was crucial to achieving your goals.

Questions and Answers

Take a moment to review the learning objectives with the facilitator and other participants. Do you have any outstanding questions or comments to share with the group? Was there anything you hoped to discuss but didn't get a chance to?

Additional Reading

Read WLP's *Measuring Change* and WLP's new *Capacity Building Toolkit: Principles of Monitoring and Evaluation* and review the video, websites, and publications listed in the Resources section.

[26] Women's Self-Promotion Movement (WSPM), WLP's partner in Zimbabwe, is a grassroots organization created in Zimbabwe by women from various African countries. WSPM implements women's economic empowerment and capacity-building programs that seek to improve the lives of disadvantaged women through education, economic development, and women's leadership trainings. WSPM primarily works with disadvantaged women and girls in the Southern Africa region.
[27] Comments made during *Writing Grant Proposals,* WLP Online Training, June 2014.

Conclusion

From beginning the research on funders to handing in your final grant report, fundraising is built on relationships. Throughout each step of the proposal and report writing process, remember that you are building a strong relationship with your funding partner—one that is built on trust, transparency, and a good return on the funder's investment. Building strong relationships with funding partners is critical to secure long-term funding and to ensure that you have supporters in times of crisis and emergency. The goal of this training is to give you the tools and resources to be able to identify strong funding allies that may be most interested in supporting your programs, and to build lasting relationships with those funders through writing compelling proposals and accurate and engaging reports.

We hope you will share this information with your colleagues, co-workers, and others working in civil society, non-governmental, and community-based organizations in your networks.

Post-learning Evaluation

There will be a post-learning evaluation. You will receive a link to a survey after the session is over. Please take a few moments to complete this evaluation. Your feedback is important to improve WLP's future learning sessions.

Resources

Video: *What Grant Makers Want*
http://link.brightcove.com/services/player/bcpid1254868504001?bckey=AQ~~,AAAAAFNlFfM~,8U8Lf2MtcfvVNd9ndwL9KLsQvqlW6rgT&bclid=0&bctid=3647072855001
This short video shows a variety of international funders stating what they are looking for in grant proposals.

Finland's Logical Framework Approach (from the Finland Ministry for Foreign Affairs: *Manual for Bilateral Programmes*)
http://formin.finland.fi/public/download.aspx?ID=102581&GUID=%7bD9AB5D98-2CE5-4681-9E51-49CCD252C61C%7d
This is a good example of a logic framework (see mainly their pages 94-96).

The Ben B. Cheney Foundation's website (http://www.benbcheneyfoundation.org/title-bar-2/) has a sample "Model Proposal Letter" showing a good way to structure an LOI or initial contact letter, with helpful notes. The site also has a link to "Tips for Grants Seekers."

Stop Measuring Activities and Start Measuring Outcomes
http://philanthropy.com/blogs/measuring-up/stop-measuring-activities-and-start-measuring-outcomes/275?cid=pw&utm_source=pw&utm_medium=en

Measuring Up: Advice for evaluating a charity's work
http://philanthropy.com/blogs/measuring-up/4-tips-for-measuring-outcomes-instead-of-activities/301?cid=pt&utm_source=pt&utm_medium=en and
http://philanthropy.com/blogs/measuring-up/a-simple-tool-to-show-how-you-are-measuring-progress/321?cid=pt&utm_source=pt&utm_medium=en

http://grantspace.org/
This website, from the Foundation Center, provides videos, classes, and tutorials to improve skill sets for writing proposals. Some of the materials and classes are free, they charge for others.

https://webgate.ec.europa.eu/europeaid/online-services/index.cfm?ADSSChck=1248940093816&do=publi.welcome&userlanguage=en
The EU's portal for open RFPs and Calls for Proposals – a searchable database.

http://www.nonprofitexpert.com/international-grants/
This website contains information on international grantmakers as well as links to other helpful resources.

http://blog.wennergren.org/category/how-to-write-a-grant-proposal/
This website has lots of very good, practical advice about writing proposals (not just about writing proposals to the Wenner-Gren Foundation).

http://sjoseph.ucdavis.edu/workshops/proposal-writing-resources
Although the proposal writing resources listed here are more academic than development focused, they might be helpful in some cases.

http://www.afpnet.org/files/ContentDocuments/AIE_Cessna_StepsLargeGovGrantsP1.pdf
http://www.afpnet.org/files/ContentDocuments/AIE_Cessna_StepsLargeGovGrantsP2.pdf
http://www.afpnet.org/files/ContentDocuments/AIE_Cessna_StepsLargeGovGrantsP3.pdf
http://www.afpnet.org/files/ContentDocuments/AIE_Cessna_StepsLargeGovGrantsP4.pdf
http://www.afpnet.org/files/ContentDocuments/AIE_Cessna_StepsLargeGovGrantsP5.pdf
http://www.afpnet.org/files/ContentDocuments/AIE_Cessna_StepsLargeGovGrantsP6.pdf

These downloads have basic information about applying to various U.S. government agencies for grants.

Additional publications that may be useful:

- Howlett, Susan and Renee Bourque. *Getting Funded: the complete guide to writing grant proposals.* 5th ed., rev. Seattle: Word & Raby Pub., 2011.
- Clarke, Cheryl A. *Storytelling for Grantseekers: a guide to creative nonprofit fundraising*. 2nd ed. San Francisco: Jossey-Bass, 2009.
- Geever, Jane C. *The Foundation Center's Guide to Proposal Writing*. 6th ed. New York: The Foundation Center, 2012.
- Margolin, Judith B. *Grantseeker's Guide to Winning Proposals*. New York: The Foundation Center, 2008.
- Payne, Mary Ann. *Grant Writing Demystified*. Dubuque, IA: McGraw-Hill, 2011.
- The Grantsmanship Center, "Program Planning and Proposal Writing"

Appendix 1

Standard Information for a Letter of Inquiry (LOI)

An LOI is usually a very short (one- to two-page) description of the most important information relevant to the project you want to propose. An LOI is ***not*** an outline of your proposal. It is a short, very concise version of your proposal with the most compelling facts or answers to targeted questions that the funder has specified.

The funder may require an LOI before being willing to accept a full proposal. Therefore, it is important to make your LOI a very concise, *compelling* statement of the project or activity's need and potential outcome – else you won't get to the next step, sending them a full proposal!

Information usually requested or included in an LOI:

- A brief background of your organization, including mission statement, date founded, constituency and geographic region served, type of service provided, and annual operating budget size.

- A short description of the project, including the community need, the project's importance to your organization and constituency, and the potential outputs and outcomes.

- A summary budget that includes the total project cost, the amount you intend to request from the funder, and other potential or actual sources of support.

- A brief description about why you are approaching this particular funder for this project.

Appendix 2

Standard Information for a Case Statement

- What is your organization's history, mission, and scope?
- Describe the proposed project clearly and concisely.
- Why is this project important? What critical **community need** does it address?
- How will your organization or the project **directly address** the important community need?
- Whom will this project benefit or serve? What types of groups? How many people will the project benefit or serve (*outputs*)?
- How do you plan to implement the project?
- What will donations from individuals or grants from funders enable you to do? *What are the potential outcomes? What will the project accomplish? What will the impact of the project be on the community (How will life be different/better for the community after the project is complete?)?*
- Are there other organizations in this community providing similar services or programs? If so, how is your organization different? Are you collaborating with others?
- Why is your organization the best one to carry out this project?
- How do your organization's results compare with those of others?
- Is this program or service new or has it been going on for some time? If it has happened in the past, how has it been funded before this?
- How will your organization, this work, or the project be sustained *after* this grant is finished?
- How will you monitor, evaluate, and/or share your results?
- Why you are applying to this particular funder for support for this project (*how does this project help the funder meet its goals?*)?
- Fundraising Plan
- Donor Recognition Opportunities
- What is your Theory of Change, Activity Plan, and Project Timeline?
- Project Budget

Appendix 3

Writing Samples

The difference between ***simply addressing*** the funder's questions or required information and writing something that will ***engage and interest*** the funder can be shown in the following example, where a funder asks you to provide information about your organization's mission, history, and programs:

> *Sample A*: The Acme Organization's mission is to serve the needs of rural women in southern India. It was started in 1989. Its programs include women's self-help *groups,* a women's cooperative, and IT and other trainings.

> *Sample B*: The Acme Organization's mission is to serve the urgent and emerging needs of women in southern India by providing them with programs held in a safe and stimulating environment where they can learn, discover, create, socialize, and be heard. The Acme Organization was founded by local activists in 1989 in response to a community need. During the mid-1980s southern India saw a wave of violence against women, and women were concerned for their safety. This growing concern resulted in open community forums that involved a broad spectrum of women who were highly verbal about the serious problems they encountered daily. When asked what they needed most, the women unanimously responded: a safe place to gather, to support each other, to access support services for women facing violence in their lives, and to access services that would increase their self-reliance. When the Acme Organization opened its doors, its first goal was to fulfill these needs. Since that time the Acme Organization has evolved into a women-focused community center that provides a wide variety of free services for women, including women's self-help *groups,* a women's cooperative, and IT and other trainings.

Sample A does answer the funder's required question, but it does so in a very dry manner. Sample B ***engages*** the reader by involving them in ***why*** the organization was founded – and describes the **community need** that led to the organization's founding.

Sample Funder Questions or Required Information

One funder listed the following as what they wanted to see in a proposal:

> "Describe the problem to be addressed, the constituency to be involved, program goals and strategies. Provide a general workplan describing how the strategies will be undertaken during the grant-funded period. Explain the size of your organization, and a discussion of who will be doing the work. Describe collaborations with other related groups, as well as your organization's unique niche in the larger social service community. Explain how you will determine the success/effectiveness of your project."

To **make it easy for the funder to see that you have responded to the information they requested**, it can be helpful to <u>structure your proposal</u> using specific headings or bullets to <u>address each of the funder's requirements</u>:

- **<u>Problem to Be Addressed</u>**: *This is a statement (with research backing up your assertions) of the community need for your organization or project.*
- **<u>Constituency to Be Involved</u>**: *Who will be served by this project? How many? What are their demographics (women/men, rural/urban, low-income/poverty-level, age range, etc.).*
- **<u>Program Goals and Strategies</u>**: *What are the overall goals of the project? What activities (trainings, publications, etc.) are necessary for you to achieve your goals? You could include both outputs and outcomes here (e.g., "hold three trainings for a total of 100 women," "help women increase political participation," or "bring attention to the need to change family laws that discriminate against women").*
- **<u>Workplan</u>**: *How will you implement the project? What steps do you need to carry out to achieve your goals?*
- **<u>Organization Size</u>**: *How many staff people does your organization have? How is it governed (by a volunteer Board of Directors? By the women served?)?*
- **<u>Who Will Be Doing the Work</u>**: *Will the work be completely carried out by your organization's staff? If so, what are their qualifications? Will volunteers be involved?*
- **<u>Collaborations with Other Groups</u>**: *How do you or will you collaborate on this or other projects with other groups working in your geographic location (e.g., banks that might support women's economic empowerment) or in your topical area (e.g., other women's rights groups)?*
- **<u>The Acme Organization's Unique Niche</u>**: *What makes your organization unique? Why should the funder support your organization?*
- **<u>Project Evaluation</u>**: *How will you evaluate the project's activities and know whether you reached your goals? It's good to provide both* quantitative *and* qualitative *means of evaluation here (see* Measuring Change or WLP's new *Capacity Building Toolkit: Principles of Monitoring and Evaluation for examples of ways to do this). If you have space, you might also include information about how you will monitor the program.*

Appendix 4

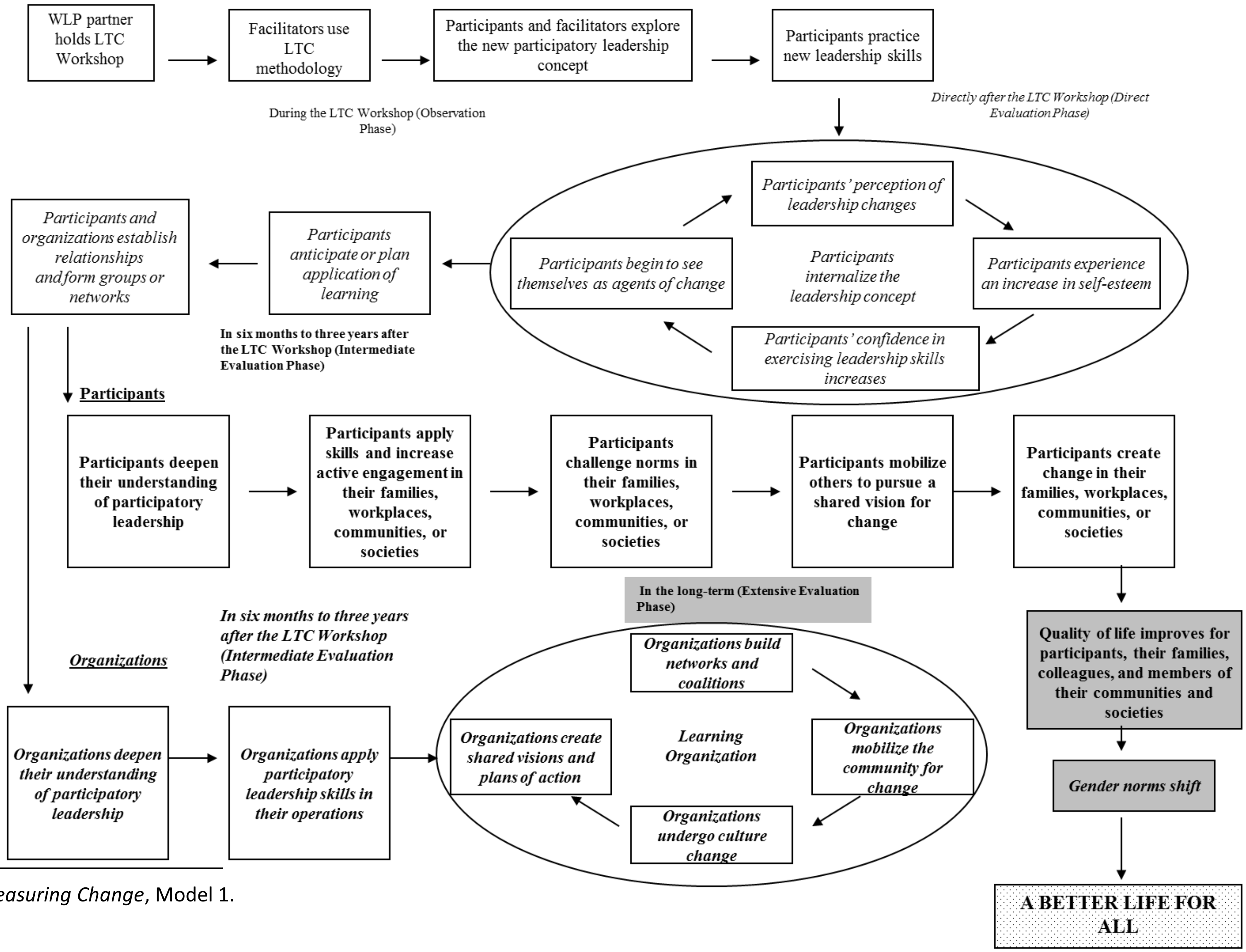
Sample Project Timeline

Month	Activity	Responsibility
Month 1 (or June 2014)	Hire Program Director	Executive Director
Month 2 (or July 2014)	Confirm specifics for all program activities	Program Director
Month 3-5 (or Aug. – Oct. 2014)	Implement trainings	Program Director and on-site trainers
Month 3-5 (or Aug. – Oct. 2014)	Report program metrics	Program Director and on-site trainers
Month 6 (or Nov. 2014)	Evaluate program	Program Director
Month 7 (or Dec. 2014)	Write and submit final report on program to funders	Program Director and Finance Staff
Month 7 (or Dec. 2014)	Share lessons learned and publicize program's success	Program Director

Appendix 5

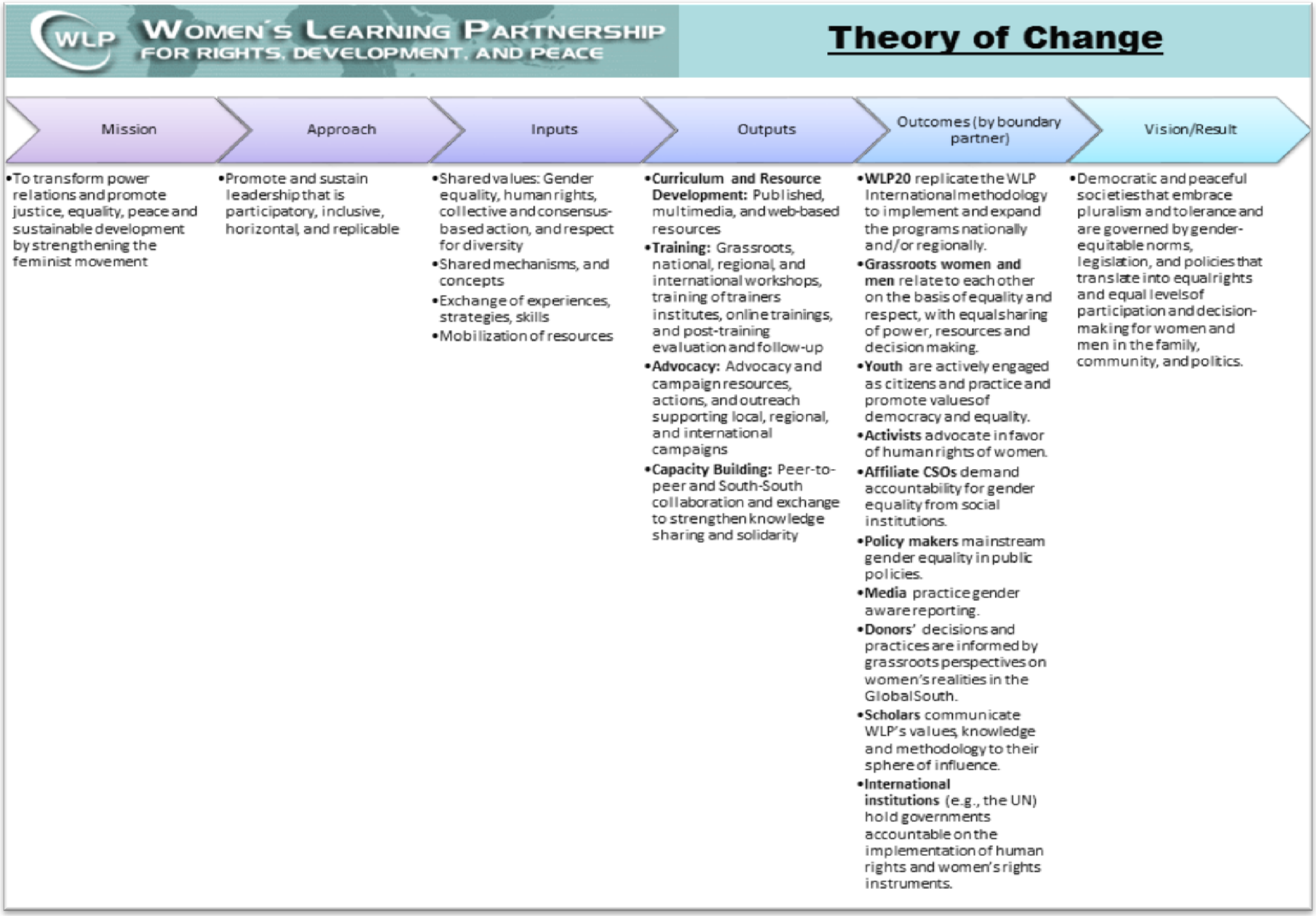
Theory of Change Samples[28]

Model 1: The WLP Model of Change for the *Leading to Choices* Program



[28] From *Measuring Change*, Model 1.

Model 2: WLP's Theory of Change



Appendix 6

Sample Excerpt: Foundation Center Report by Interest Area[29]

Grantmaker Name	Contact	Care Of	Street Address 1	City	State	ZIP Code	Telephone	Fax	E-mail	URL	Total Assets	Total Giving
Arcus Foundation	Carol Snapp, Comms. Mgr.		402 E. Michigan Ave.	Kalamazoo	MI	49007-3888	(269) 373-4373	(269) 373-0277	contact@arcusfoundation.org	http://www.arcusfoundation.org	$167,555,502	$25,425,501
Carnegie Corporation of New York	Rikard Treiber, Assoc. Corp. Secy. and Dir., Grants Management		437 Madison Ave.	New York	NY	10022-7003	(212) 371-3200	(212) 754-4073		http://www.carnegie.org	$2,432,582,536	$100,968,656
Channel Foundation			603 Stewart St., Ste. 415	Seattle	WA	98101-1247			info@channelfoundation.org	http://www.channelfoundation.org	$7,074,936	$434,323
Damien Foundation		Darlene Currie	P.O. Box 29903	San Francisco	CA	94129-0903		(415) 561-6401			$1,146,059	$376,174
Draper Richards Foundation, The	Jennifer Shilling Stein, Exec. Dir.; Anne Marie Burgoyne, Dir.; Christy Chin, Dir.		50 California St., Ste. 2925	San Francisco	CA	94111-4779	(415) 616-4050	(415) 616-4060	info@draperrichards.org	http://www.draperrichards.org/	$14,751,338	$1,015,000
Echoing Green	Cheryl L. Dorsey, Pres.		494 8th Ave., 2nd Fl.	New York	NY	10001-2519	(212) 689-1165	(212) 689-9010	info@echoinggreen.org	http://www.echoinggreen.org	$3,913,315	$1,740,725
Fledgling Fund, The			162 5th Ave., Ste. 901	New York	NY	10010-5967			info@thefledglingfund.org	http://www.thefledglingfund.org	$18,446,847	$2,126,605
Ford Foundation	Secy.		320 E. 43rd St.	New York	NY	10017-4801	(212) 573-5000	(212) 351-3677	office-secretary@fordfoundation.org	http://www.fordfoundation.org	$10,881,598,073	$468,301,444
Fund for Nonviolence	Betsy Fairbanks, C.E.O. and		303 Potero, No. 54	Santa Cruz	CA	95060-2760	(831) 460-9321	(831) 460-9137	mail@fundfornonvio	http://www.fundfornonviolen	$6,126,928	$1,514,833

[29] This report is based on a Foundation Center Online search of funders who specified "International Human Rights" as an *Interest Area* for funding (report researched and downloaded in late 2009).

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