

Hosted by **SCORE**  | Northeast New Jersey

How to Secure Grant Funding

LAUREN FRARY, DIRECTOR OF STRATEGIC BUSINESS TRANSFORMATION

SAX LLP

About SCORE

As a resource partner of the SBA, we help small businesses by:



Providing free
business advice
and mentoring



Offering low or
no-cost business
training



Sharing free business
templates and
resources

Request a SCORE mentor at www.score.org/find-mentor

Your Presenter

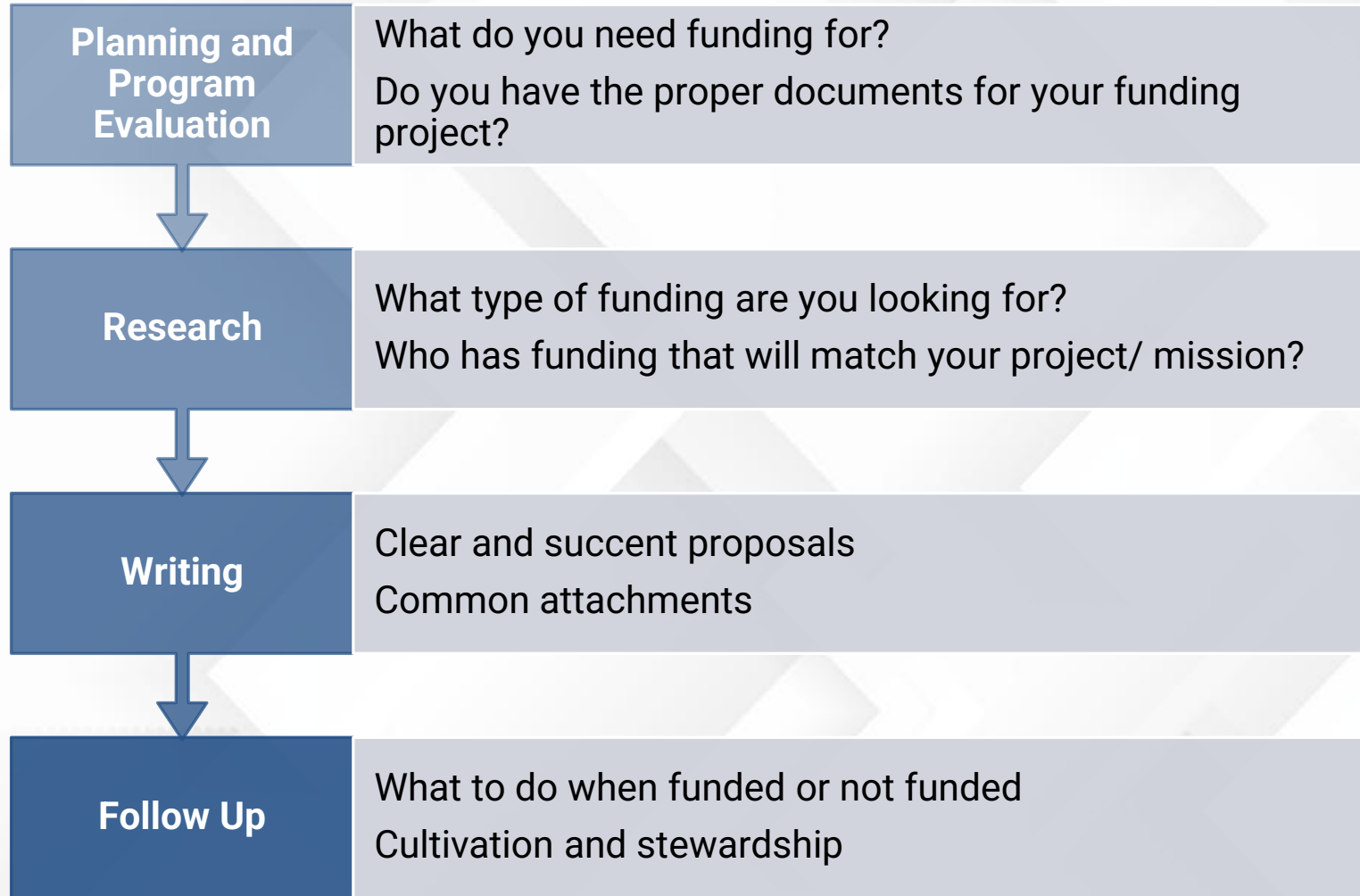


- **Lauren Frary** joined SAX in 2022 as the Director of Strategic Business Transformation, where she lends her 35 years of experience to provide consultative services to nonprofits in all areas and for all levels of an organization.

This includes but is not limited to: Board Development, Governance, Leadership, Fundraising, Programs, Strategic Planning, Disaster Management, and team building.



4 Phases of Grant Writing



Planning and Program Evaluation



Planning

What are you looking to fund? – new or expansion of program/ services

Have you clearly researched the need → what data do you have?

Do you understand the cost of what you want to achieve?

Do you have the time and resources to write and manage a grant award?



Program Evaluation (new or existing)

What are the objectives of the program?

How will you measure progress towards objectives?

Will you use a satisfaction survey for stakeholders of the program?

Tips for Planning and Program Evaluation

- Articulate clearly about what you want to fund
- Research the need – local, state, national data on the issue:
 - County Needs Assessment
 - ALICE Report
- Beneficiaries of your program/ project
 - Primary
 - Secondary
 - Tertiary (taxpayer)

Tips for Planning and Program Evaluation

- Budget – understand the true cost
 - Personnel
 - Facility
 - Transportation
 - Supplies
 - Consultant
 - Administrative (10%)
- Capacity
 - Who will be responsible for writing, reporting and fiscal management

Research – Finding a Match

There are many types of funders:

- Foundations
- Corporate Giving
- Federal Governmental Grants
- State Governmental Grants
- Local Governmental Grants

Grant Locator Resources

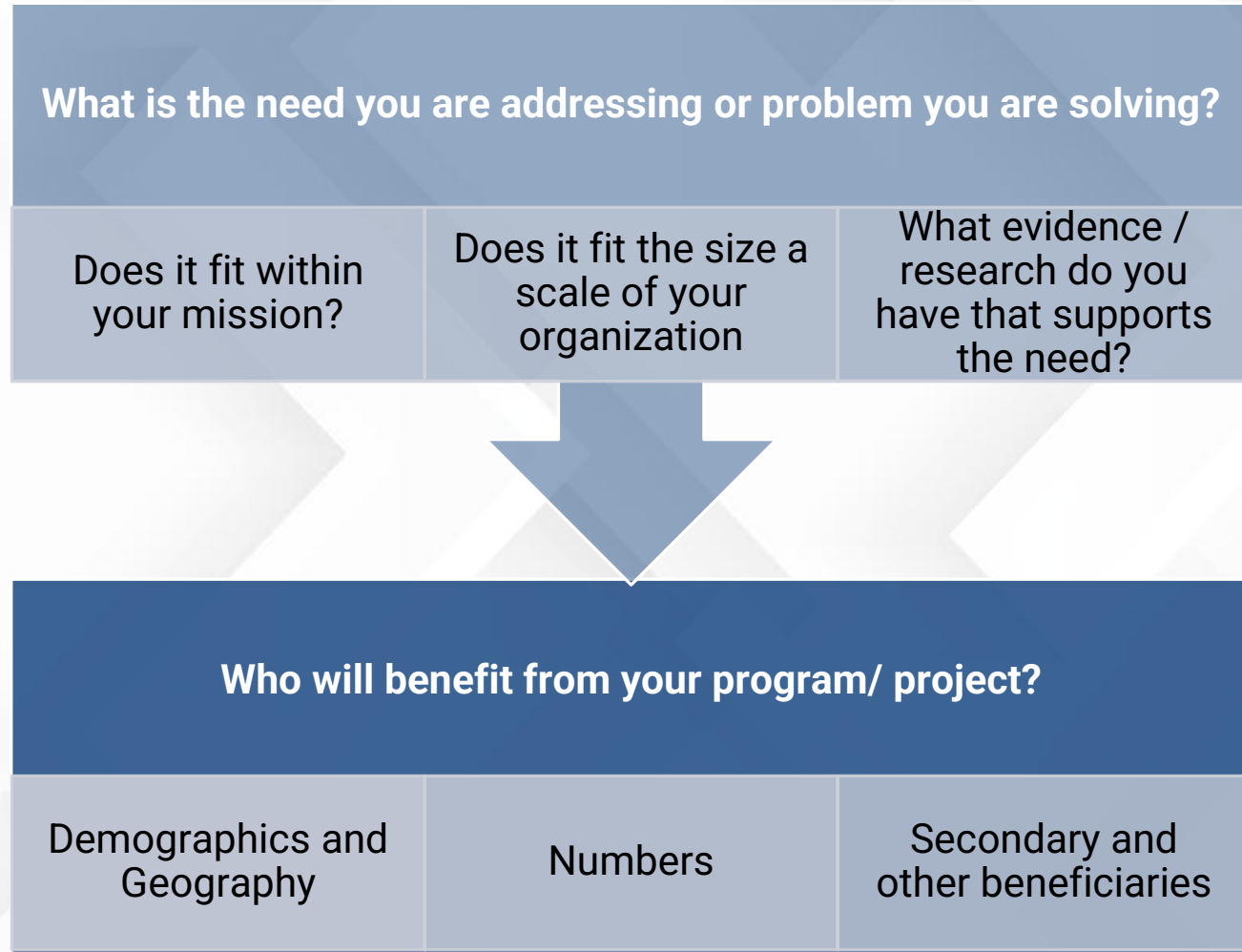
- Search Engines (Grant station, Grant Watch) – subscription costs
- Funding Information Network – FREE in 8 NJ Libraries
- State Association of NP's – NJ Center for Nonprofits
- Regional Association of Grant makers – Council of NJ Grant makers

Working with Grantors

Ensure your project aligns with the funders: write about how you will be meeting the funders philanthropic Goals:

- philanthropic priorities
 - areas of geographic priorities
 - priority populations
- Look at previous awards to ensure alignment with other funded projects
 - Call grant manager/ administrator for introductions and confirmation of match

Narrative Elements



Tips for Getting Started

- Create a file with all necessary information/ attachments:
 - Update annually
 - Letter of Incorporation
 - 501 c3 determination
 - List of Board members
 - Annual report/ marketing materials
 - Audit (or financial review)/ 990
 - Top 10 donors
 - Organizational and program budgets (high level)

Narrative Elements

Impact

- What do you want to achieve? Long term? Short term?
- Is your impact deep or broad?
- Program Evaluation - How do you know you are successful?
 - Create concrete Goals/Objectives (use SMART)
 - Conduct satisfaction surveys
 - Collect anecdotal information and stories
- What are the strategies to achieve your goals?
- What is your actual plan of execution to achieve goals? (timeline)

Narrative Elements

What makes your organization uniquely qualified to accomplish these goals?

- Proven strengths
- Analysis of other similar organization
- Track record of success and growth
- Strong consistent leadership
- Board support and participation
- Annual reports and other business materials
- Longevity of organization and key staff
- Awards received

Narrative Elements

- Partnerships and collaborations
 - Do you have MOU's with other organizations
 - Make sure collaborators are all aligned with grant requirements
 - Identify one organization as the lead

Sustainability

- How will the project/program continue after the funding has been used?
- Other sources of funding?
- Is there a fee/ tuition component?
- Will other organizations collaborate and support?
- Will volunteers play a part?
- Can the budget sustain the work?

Executive Summary

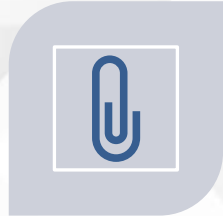
One page
version of the
grant:

Take the key
element from
each section
of the narrative

Be factual and
concise

Always end
with a “thank
you for your
consideration”
and the CEO’s
signature

Prior to Submission



ADD ONLY THOSE
ATTACHMENTS
THAT ARE ASKED
FOR



EDIT / SPELL CHECK
– HAVE SOMEONE
ELSE REVIEW



KEEP LANGUAGE
CLEAR AND CONCISE –
AVOID ACRONYMS (OR
SPELL THEM OUT THE
FIRST TIME)



FOCUS ON THE
FUNDERS PRIORITIES
AND HOW YOU CAN
PARTNER TO SUPPORT
THEM



FOLLOW THE
FUNDERS
GUIDELINES
CAREFULLY

The Decision – It's Not Personal!

YES

- Acknowledge in a variety of ways
- Keep the funder informed (send pics)
- Offer a tour (if feasible)
- Be responsive
- Report out as required
- Use the funds appropriately

NO

- Acknowledge
- Ask for feedback on your proposal
- Ask for information on other possible funders
- Inquire about future funding opportunities
- Seek out other funders/prospects

Reporting

Elements in a grant report:

- An overview of the project or program funded by the grant
- A description of how the project or program aligns with the funders mission
- An explanation of how you met (or didn't meet) the projects goals and objectives
- A discussion of what was learned (what worked and what did not work)
- Financial information – how the money was spent
- Information about the people serve and the impact on the community
- Recommendations for the future

Tips for Reporting

- Ensure you understand the reporting requirements
- Create calendar items for due dates – both programmatic and fiscal reports
- Use the funds as agreed upon; any challenges, contact the funder
- Unless provided, create a reporting template for both program and fiscal reporting

Grant Maker Trends- Trust Based Philanthropy

Trust-Based Philanthropy - An approach to giving that addresses the inherent power imbalances between funders, nonprofits and the communities they serve.

Guiding Principles:

- Give multi-year unrestricted funding
- Do the homework – funders are responsible for getting to know and researching the organizations they want to fund
- Simply and streamline paperwork – with a focus on dialog not reports
- Funders are responsible for being transparent and responsive (open and honest communication)
- Solicit on act on feedback from grantees (good and bad)
- Offer support beyond the check (other nonmonetary resources)
- Examples: Ford Foundation; Patterson Foundation

Grant Maker Trends – Community Based Philanthropy

Community-Based Philanthropy - An approach that prioritizes community asset-building, agency and trust in order to shift power to beneficiary communities.

Guiding Principles:

- Gaining support of community member through trust
- Leveraging community resources
- Determine the use of external resources in that community to better address challenges and improve quality of life
- Shared power in decision making for the common good
- Community members control what happens in their community as they are better informed
- Examples: Social Venture Partners Seattle (www.socialventurepartners.org/seattle/)
- Cleveland Foundation (www.clevelandfoundation.org/)

Conclusions

- Preparation and Research are Key Elements to a successful proposal
- Connect with the Grantor prior to submission
- Writing should be clear, concise, focused and void of acronyms
- Good Follow up and Project Management will ensure future opportunities

Presented by:

MA

Director of Strategic Business Transformation



www.saxllp.com

Lfrary@SaxLLP.com

Helpful Links

- Find SCORE resources for small businesses at www.score.org/templates-resources
- Find more SCORE live and recorded workshops and courses at www.score.org/get-business-training
- Book an appointment with a SCORE mentor at www.score.org/find-mentor





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