



A to Z Grantwriting © 2007

with Linda Vallejo

California Resource and Recovery Association
2007 CONFERENCE

*“A Comprehensive Overview of Foundation and Corporate
Grantwriting for Recycling and Solid Waste Professionals”*

Grantwriting Workshop
presented by
LINDA VALLEJO

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People give to people

Networking with Potential Funders

Have you and your institution been in contact with the people who care about the issue you are working to raise funds for?

- community members such as local businesses, corporations, individuals with resources and VIPs
- foundation program directors, officers, and politicians

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Grantwriter's Credos

- ***“People give to people”***



Elements of a Proposal

■ Contact

- Develops positive communications with potential funders who care about issue

■ Letter of Inquiry

- Introduces the Institution and/or Department, Proposed Project
- Requests Amount
- Generally 2 to 3 pages in length
- 'The X institution wishes to thank the X foundation for this opportunity to submit a Letter of Inquiry requesting a grant for \$100,000 to support our X, Y, Z program.'



Elements of a Proposal

- **Letter of Request OR Full Proposal Package**
 - *Letter of Request*
 - Outlines the Institution and/or Department and Proposed Project, and Requests a specific amount
 - 5 to 10 pages in length
 - ‘The X institution wishes to thank the X foundation for this opportunity to request a grant for \$100,000 to support our X, Y, Z program.’



Elements of a Proposal

- *Full Proposal Package*
 - Outlines the Institution and/or Department and Proposed Project, and Requests a specific amount from the funder
 - Includes a Cover Letter with logo, contact information and signature
 - 5 to 20 pages; Letter of Request, but with more detail

■ **Supplemental Documents and Materials**



Which Type of Grant Will Work for You?

- **General fund, general operating, or unrestricted**
 - Further the general purpose or work of an institution, rather than a specific project
- **Building or renovation**
 - Constructing, renovating, remodeling, or rehabilitating property
- **Continuing support**
 - Renewed on an annual basis
 - Request to funders who have supported your institution in the past



Which Type of Grant Will Work for You?

■ **Emergency funds**

- One-time grants cover immediate, short-term funding needs on an emergency basis

■ **Employee-matching gifts**

- Corporate foundations grant these to match gifts made by corporate employees

■ **Restricted or special-project grants**

- Awarded for specific items or special projects
- Restricted; funds may be spent only on agreed-upon project costs



Which Type of Grant Will Work for You?

■ In-kind gifts

- Contributions of services, equipment, and supplies

■ Matching or challenge support

- Matches funds provided by another donor
- Pay only if the grantee is able to raise additional funds from another source, has in-kind support, or has funds awarded by another funder

■ Program development

- Support for specific projects or programs
- May include the planning process or program expansion



Funder Research Information Sheet (RIS)

FUNDER RESEARCH INFORMATION SHEET (RIS)

FUNDING SOURCE:	
WEB SITE ADDRESS:	
MAILING ADDRESS:	
PHONE:	FAX:
EMAIL ADDRESS:	
CONTACT PERSON:	
TITLE:	
DUE DATE (S):	
GEOGRAPHIC LIMITATIONS:	

COLLEGE/DEPARTMENT SUPPLEMENTAL DOCUMENTS <input type="checkbox"/> History/Background <input type="checkbox"/> Mission and Goals <input type="checkbox"/> Major Accomplishments <input type="checkbox"/> Board of Trustees w/ Affiliations <input type="checkbox"/> Contributor's List <input type="checkbox"/> EIN – DUNS Number <input type="checkbox"/> College Financial Documentation <input type="checkbox"/> Press and Printed Materials/Photographs <input type="checkbox"/> Leadership and Staff Bios <input type="checkbox"/> Collaborating Partnership List <input type="checkbox"/> Other _____	INITIAL APPROACH TO THE FUNDER <input type="checkbox"/> Letter of Inquiry <input type="checkbox"/> Letter of Request <input type="checkbox"/> Phone Contact <input type="checkbox"/> Formal Proposal <input type="checkbox"/> Application Form PROPOSED PROJECT PACKAGE DOCUMENTS <input type="checkbox"/> Overview of Proposed Program <input type="checkbox"/> Need Statement <input type="checkbox"/> Measurable Objectives <input type="checkbox"/> Timeline <input type="checkbox"/> Evaluation Plan <input type="checkbox"/> Letters of Support/Collaboration <input type="checkbox"/> Staff Listing <input type="checkbox"/> Project Budget and Request
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FUNDING SOURCE PROFILE

Program Emphasis:	
Decision Making Process/Turnaround Time:	
Type of Support:	
Average Gift:	
Giving History:	

CONTACT HISTORY

Call Date	Name/Contact	Outcomes/Next Steps

PROPOSAL INFORMATION

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Funder Research Information Sheet (RIS)

FUNDER RESEARCH INFORMATION SHEET (RIS)

FUNDING SOURCE:			
WEB SITE ADDRESS:			
MAILING ADDRESS:			
PHONE:		FAX:	
EMAIL ADDRESS:			
CONTACT PERSON:			
TITLE:			
DUE DATE (S):			
GEOGRAPHIC LIMITATIONS:			



Funder Research Information Sheet (RIS)

SUPPLEMENTAL DOCUMENTS

History/Background
Mission and Goals
Major Accomplishments
Board of Trustees w/ Affiliations
Contributor's List
EIN – DUNS Number
Financial Documentation
Press and Printed Materials/Photographs
Leadership and Staff Bios
Collaborating Partnership List
Other _____

INITIAL APPROACH

Letter of Inquiry
Letter of Request
Phone Contact
Formal Proposal
Application Form

PROPOSED PROJECT

Overview of Proposed
Need Statement
Measurable Objectives
Timeline
Evaluation Plan
Letters of Collaboration/MOU
Staff Listing
Project Budget and Request



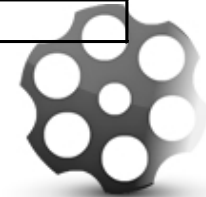
Funder Research Information Sheet (RIS)

FUNDING SOURCE PROFILE

Program Emphasis:		
Decision Making Process/Turnaround Time:		
Type of Support:		
Average Gift:		
Giving History:		

CONTACT HISTORY

Call Date	Name/Contact	Outcomes/Next Steps



Funder Research Information Sheet (RIS)

PROPOSAL INFORMATION

Language:	
Approach:	
Final Reporting:	
Date Submitted:	
Outcome:	



Proposed Project Package

- **Overview of Proposed Program paragraphs**
- **Need Statement**
- **Measurable Objectives**
- **Timeline**
- **Evaluation Plan**
- **Letters of Support or Collaboration**
- **Project Budget And Request**

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Proposed Project Package

- **Overview of Proposed Program paragraphs**
 - Overviews proposed program
 - Describes basic components and attributes
 - Includes information outlining your institution 's accomplishments and capacity to complete the proposed program goals
- **Need Statement**
 - Explains the nature of the problem the proposed program will solve
 - Includes research and statistics about the problem and how it is affecting your community



Proposed Project Package

- **Measurable Objectives**
 - Lists major milestones or checkpoints
 - Shows funder your success in measurable terms
 - Will be evaluated after completing the program
- **Timeline**
 - Details the sequence of tasks and activities
 - Includes start and finish dates
 - Includes resources and staff needed
- **Evaluation Plan**
 - Describes how the program will be evaluated
 - Details who will be doing the evaluating
 - Outlines evaluation tools and methods

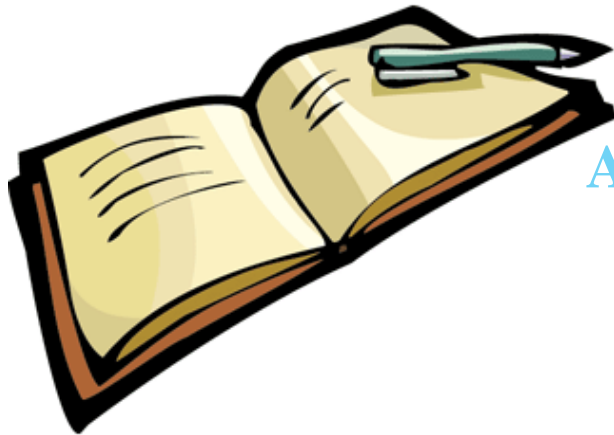


Proposed Project Package

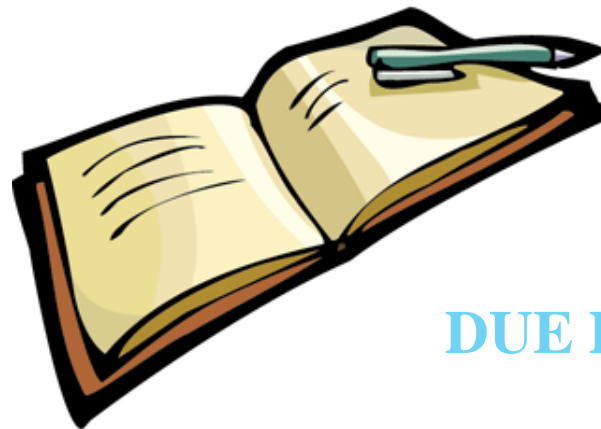
- **Letters of Support or Collaboration**
 - Outline your partner organizations and/agencies' commitments to your project through in-kind donations, funds, and/or staff
 - Share the partner organization's belief in your project, what they will bring to the table to ensure its success, and how this project will make a difference
- **Project Budget And Request**
 - Outlines program budget, including estimated expenses and projected needs



Making Your Red-Hot Resource Books



ALPHA BOOK



DUE DATE BOOK

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Chronology of the Grant-Writing Process

- **Research good-match potential funders**
- **Obtain the potential-funders' application guidelines and annual reports**
- **Study the application guidelines and annual report**
- **Make an introductory phone call**
 - Introduce your organization and proposed program
 - Ask specific questions about the application process;



Chronology of the Grant-Writing Process

1. Make an introductory phone call (continued)

Find the answers to the following questions:

- Is the funder interested in supporting your institution?
- What program is it specifically interested in supporting?
- Which areas of the proposed program is the funder most interested in supporting?
- What is the appropriate amount to request?
- What are the next steps to take in requesting support?
- Will the funder come for a site visit?

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Chronology of the Grant-Writing Process

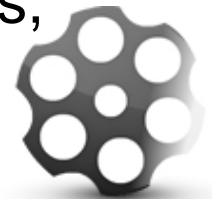
- 1. Complete the initial approach**
- 2. Submit a Letter of Request or Full Proposal Package**
- 3. Receive your grant award**
- 4. Turn a decline into something positive**
- 5. Complete a final report**



The Letter of Inquiry

- **Introductory paragraph**
 - Include the suggested request amount and a brief description of the proposed program
- **Agency/Department history, mission statement, and goals**
- **Details about the proposed program**
 - Need statement
 - Proposed Program paragraphs—brief overview (one to two paragraphs)
 - Measurable Objectives (Expected Results, Outcomes)

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The Letter of Inquiry

- **Details about the proposed program (continued)**
 - Measurable objectives (sometimes called "Expected Results" or "Outcomes")
 - Evaluation plan
 - Future funding
- **A conclusion**
 - Extends an invitation to the funder for a site visit
 - Gives telephone- and e-mail-contact information



The Letter of Inquiry

- **Introductory paragraph**
 - Includes the suggested request amount and a brief description of the proposed program
- **Information about your agency or department**
 - Includes the history, mission statement, goals, and major accomplishments
- **Details about the proposed program**
 - Need statement
 - Overview of Proposed Program paragraphs
 - Measurable objectives
 - Timeline



The Letter of Inquiry

■ Details about the proposed program (continued)

- Evaluation plan
- Key staff and leadership bios
- Project budget
- Future funding

■ A conclusion

- Extends an invitation to the funder for a site visit
- Gives telephone- and e-mail-contact information



Creating a Development Team Effort

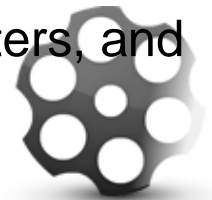
■ **Development Director**

- Oversees the implementation of the grantwriting campaign and manages the development staff
- Answers questions regarding the organization's history and efforts
- Makes the introductory phone calls to funding sources and partners and strategizes the site visits

■ **Public Relations Officer**

- Handles outreach and attends community events
- Meets interested partners and potential funders to introduce the organization's mission and efforts
- Must be good with people and enjoy phone work
- Makes introductory calls, writes funder thank-you letters, and follows-up with funders

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Creating a Development Team Effort

- **Finance Officer**

- Responsible for putting together organizational, proposed program, and report budgets
- Helps coordinate the audited financial statement

- **Grantwriter**

- Writes all the proposals and reports in collaboration with the development staff, organizational leadership, and program staff

- **Researcher**

- Researches good-match potential funders, creates the Red-Hot Resource Books
- Completes all data analysis

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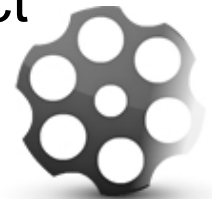
Collaborative Partnerships

- Silos vs. Collaborative Partnerships
- Funders want to support partnerships and consortiums
- Collaborative partnership: group of community stakeholders
 - Share common goals
 - Commit to pooling their efforts and resources to create and complete a successful program



Letter of Commitment or MOU

- Serves as Memorandums of Understanding (MOUs)
- MOU: Written agreement between the lead organization submitting the grant proposal and the collaborative-partner's organization
- Both partners commit to certain responsibilities and expectations, within a specific timeframe
- Outlines the partner's commitment in three ways:
 - In-kind donations of space, telephones, computers, and supplies
 - Actual funds raised to support the project
 - Staff and leadership time spent in planning, implementing, and evaluating the project



Diversify Your Funding Base

- The most successful organizations and institutions diversify their funding base by combining grants and donations from multiple funding sources
- Government-funding sources decreasing
- Time to reach out to foundation, corporate, local business, and individual donors for additional support
 - What percentage of your original award can be matched with foundation and corporate funds?
 - Matching gifts?



The Rolls Royce Package

Name	Proposal Length	Support Level
Rolls Royce	20 to 40 pages	\$100,000 to \$1,000,000
Cadillac	10 to 20 pages	\$10,000 to \$99,999
Chevy	6 to 12 pages	\$5,000 to \$9,999
Geo	6 to 8 pages	Under \$5,000



The A to Z Grantwriting System

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The Rollover Concept

- Write the Rolls Royce Proposal template
- “Edit down” to smaller proposal packages needed for foundation and corporate requests
- Use it again and again in approaching a “team of funders” to support the proposed program
- Start with the Rolls Royce and the roll it over to multiple good-match funders
- Each proposal package should be focused, personalized, tailored, and customized for each and every potential funding source

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Elements of a Rolls Royce Package

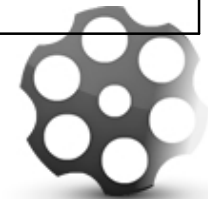
Elements of a Agency/Department Rolls Royce Proposal Package

Agency/Department Supplemental Documents

Agency/Department History & Background
Agency/Department Mission Statement and Goals
Agency/Department Major Accomplishments
Agency Heads and Board Listing w/ Affiliations
Agency/Department Contributors List
EIN Number/DUNS Number
Agency/Department Financial Documents
Press and Printed Materials/Photographs
Staff and Leadership Bios
Agency/Department Collaborating Partner List

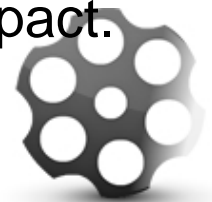
Proposed Project Documents

Overview of Proposed Program
Need Statement/Problem Statement
Measurable Objectives
Timeline
Evaluation Plan
Letters of Support/Collaboration
Staff Bios
Project Budget and Request

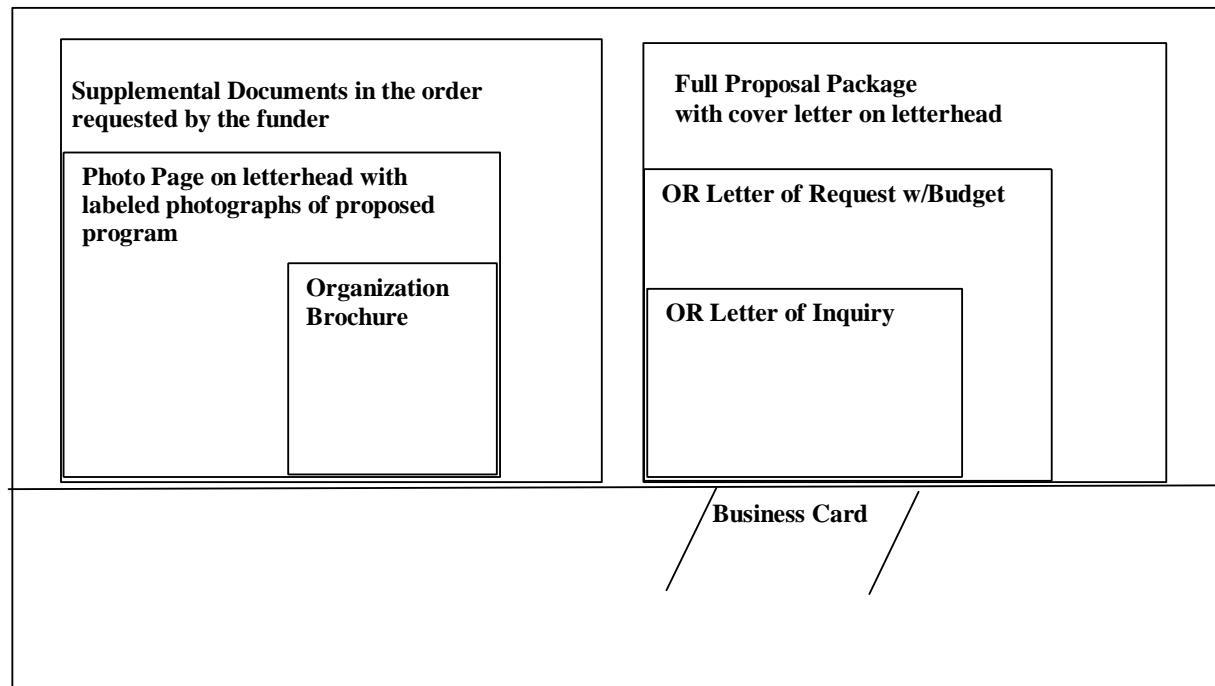


Creating a Team of Funders

- Team of Funders
- List of other funding sources with amounts, department and/or proposed program
- Majority of funders will be interested in supporting a specific area
- Scale the project according to funding received
 - If you raise double the funds, you can double the number of individuals served by the program or extend the program for an additional time period. If you do not raise all the funds needed, you may choose to implement the program in stages or limit its impact.



Packaging Your Foundation and Corporate Proposal Packages





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