



Proposal Writing 101

Building Skills & Confidence in Proposal Writing

First Nations Housing Conference 2017

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Introduction

- About the presenter
- Meet your neighbour
- Build relationships

What comes to mind when you think about grant writing?



This workshop is to inspire you to think big, encourage you to be creative, and help increase your confidence in grant writing! You can *do this!*

Presentation Outline

- ▶ **Part 1. Grant Seeking** → 6 Step 'GRANTS' Process

- ▶ G → Get ready, get set, go!
- ▶ R → Relationships
- ▶ A → Ask
- ▶ N → Networking
- ▶ T → Think Big
- ▶ S → Search & Compile

- ▶ **Part 2. Grant Writing** → 12 Step Process

- ▶ **Final Tips**

- ▶ **Group Exercise**

- ▶ Your turn to review: Evaluating a Sample Proposal



Part 1. Grant Seeking: 'GRANTS'



Part 1. Grant Seeking: 'GRANTS'

G R A N T S

▶ STEP 1: G → Get ready, get set, go!

- ▶ Get ready → The more energy you put in, the more you'll get out
- ▶ Get set (and get clear) → Write out the CORE of your initiative
 - ▶ Introductory statement; who you are; how much \$ you're asking for; how you will use the \$
 - ▶ Gather your team & create an **outline** or **mind map** for your initiative

▶ Go!



Part 1. Grant Seeking: 'GRANTS'

G R A N T S

▶ STEP 2: R → Relationships

- ▶ Build personal relationships with funders
 - ▶ Schedule a meeting with them, attend their information sessions, exchange cards
- ▶ Get funders on your team from the get go
 - ▶ Put yourself on *their* radar → tell them about your initiative and why it's important

"A log creates a small fire, adequate enough to warm you up; add just a few more pieces to blast an immense bonfire, large enough to warm up your entire community - needless to say that individuality counts but teamwork dynamites!"

- Jin Kwon

Part 1. Grant Seeking: 'GRANTS'

G R A N T S

▶ STEP 3: A → Ask!

- ▶ Connect with your colleagues and ask about your organization's financial history
 - ▶ *What banks process our payroll? Which funding bodies or partners have contributed funds or in-kind support over the last 5 years? Do we still have a good relationship with them? Could we ask for dollars again?*
- ▶ Ask local economic development offices near you; connect with your local university or college; reach out to corporations or organizations in your field for potential funds
- ▶ Ask, connect & collaborate with your local Council
- ▶ Ask and you shall receive!



ASK
FOR
IT

Part 1. Grant Seeking: 'GRANTS'

G R A N T S

► Step 4: N → Networking

- Related to relationship-building, but more emphasis on attending public events
- Put your name/organization/initiative on the map! Don't be shy to 'pitch' it to anyone who will listen!
- Build a network of individuals/organizations who can help you in the present & future
 - Don't forget that you also have some unique gifts and ideas to offer - networking can also mean collaborating → it's a two-way road!

"Find a group of people who challenge and inspire you, spend a lot of time with them, and it will change your life!"

- Amy Poehler



Part 1. Grant Seeking: 'GRANTS'

G R A N T S

► Step 5: T → Think BIG

- Don't limit yourself - think big!
- Get creative
 - Could you plan a fundraising event?
 - Can you hold a press conference?
 - Prepare and distribute a press release to all local and regional media announcing that you have project that needs funding



Part 1. Grant Seeking: 'GRANTS'

G R A N T S

▶ Step 6: S → Search (and Compile)

- ▶ Put some time aside (1 week) and complete thorough research on granting opportunities - it will open up opportunities for you
- ▶ Create a list and descriptions of the grants you come across; your future self will thank you!
- ▶ Google it → type in key words of the type of grant you are looking for
 - ▶ Indigenous & Northern Affairs Canada
 - ▶ FedNor
 - ▶ Ontario Trillium Foundation
 - ▶ Nishnawbe Aski Development Fund
 - ▶ Aboriginal Economic Development Fund
 - ▶ Canada150
 - ▶ CMHC
 - ▶ Matawa First Nations Management
 - ▶ Banks: RBC Royal Bank, TD Bank, Scotiabank, etc.
 - ▶ First Nations Partnership Program - Canadian Executive Service Organization (CESO) & RBC
 - ▶ Anyone else?

Part 2. Grant Writing → 12 Step Process



Part 2. Grant Writing → 12 Step Process

So you've found the grant you want to apply for! ... Now what?

▶ STEP 1. PLAN AHEAD → Give yourself enough time. Pay attention to the deadline

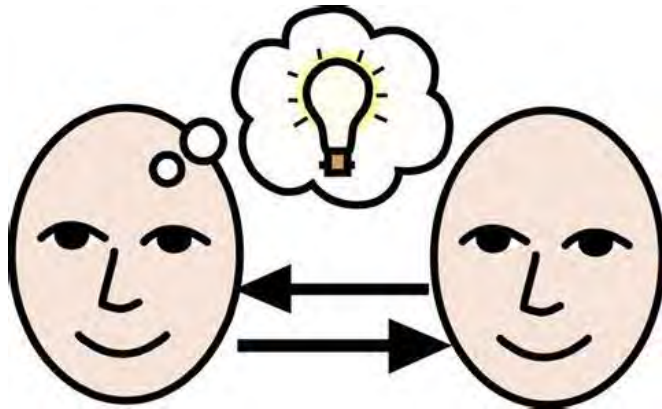
▶ Time management: Map out the process (give yourself six weeks). For example:

- ▶ **Week 1:** Grant overview: read it, print it off, share it with your team, highlight important areas & questions
- ▶ **Week 2:** Gather all of the right people around the table to ensure that you have the right information
 - ▶ Ex: Accountants, project managers, professionals, administrative team, Working Group, etc.
- ▶ **Week 3 & 4:** Write your grant! Answer all of the questions carefully
- ▶ **Week 5:** Revisions: send your draft proposal to all relevant people
 - ▶ Ex: Council, Working Group, Project Manager, etc.
 - ▶ Get their input and go-ahead
- ▶ **Week 6:** Spend 2-3 days making all of your revisions and putting the final touches on your grant
- ▶ Make **SURE** to submit your grant at least one day before the actual deadline

Part 2. Grant Writing → 12 Step Process

▶ STEP 2: INITIAL REVIEW

- ▶ Read the grant application carefully: make sure that your proposal is the type of project the grantor actually funds
 - ▶ Print off the grant & share with your teammates
 - ▶ Highlight & underline
 - ▶ Your mind map will come in handy here!
 - ▶ Consider creating an action plan to conquer the questions



Part 2. Grant Writing → 12 Step Process

▶ STEP 3: PROJECT PLAN

- ▶ Write the first draft - it doesn't have to look good at this point, you just want to get your ideas down on paper

▶ A) First, get clear:

- ▶ Project title → should be clear & accurate
- ▶ Project Goal → the long-term over-arching purpose of your project
- ▶ Project Objectives → a specific, tangible action that is measurable, short/mid-term

▶ B) Then, dig in - when designing your Project Plan, ask yourself the following:

- ▶ How will the project be carried out?
- ▶ What will you do?
- ▶ How will you do it?
- ▶ Who will do it?
- ▶ How will it be accessed?
- ▶ What will be the outcomes?

Part 2. Grant Writing → 12 Step Process

▶ STEP 4: PROJECT TIMELINE

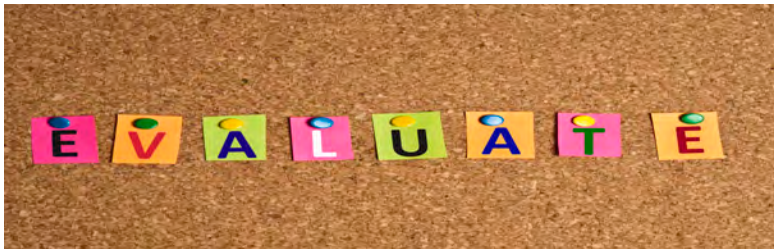
- ▶ A timeline tells the grant reader when major project milestones will begin and end during the grant's funding period (which is usually a 12-month to 3 year period).
 - ▶ Also includes accountability & evaluation
- ▶ The grant reviewer would like to see answers to the following questions:
 - ▶ What are the key tasks or activities that will be carried out to implement the program successfully?
 - ▶ Did the grant applicant include all tasks, from the day funding is announced or awarded to the last day of the project's funding time frame?
 - ▶ Can each task realistically begin and end in the proposed time frame?
 - ▶ Are evaluation activities included in the timeline chart?
 - ▶ Who is responsible for seeing that each activity is implemented and completed?



Part 2. Grant Writing → 12 Step Process

▶ STEP 5: PROJECT EVALUATION

- ▶ Why is evaluation so important?
- ▶ Internal evaluation vs. external evaluators
- ▶ **When forming your evaluation, ask yourself the following questions:**
 - ▶ What is the evaluation's purpose?
 - ▶ How will you use the findings?
 - ▶ What will you know after the evaluation that you didn't know before?
 - ▶ How will your clients and community be better as a consequence of the program?
- ▶ Quantitative vs. Qualitative techniques (what's the difference?)
- ▶ Integrate the evaluation → make your evaluation connect with the proposal's objectives & methods



Part 2. Grant Writing → 12 Step Process

▶ Step 6: PROJECT SUSTAINABILITY PLAN

- ▶ **Sustainability** is the ability of a project to achieve long-term success
- ▶ Why do you think funders want to see a Sustainability Plan?
- ▶ Not be to confused with environmental sustainability
- ▶ To formulate your Sustainability Plan, begin by asking yourself these questions:
 - ▶ *What is the long-term vision of the project?*
 - ▶ *How will it continue to run after the funding runs out?*
 - ▶ *How can you ensure its success?*



Part 2. Grant Writing → 12 Step Process

▶ Step 7: PROJECT BUDGET

▶ A) Budget Summary → Define the project's budget (and work as a team!)

- ▶ Go to the experts for getting the right numbers; it's OK not to know all the answers!
- ▶ Find out exactly what kind of equipment, labour, capital costs, and anything else you are going to need, and exactly what the cost will be so you can spell it out in the proposal.

DIRECT PERSONNEL COSTS	AMOUNT REQUIRED	NOTES
Salaries & benefits of staff	x	x
DIRECT NON-PERSONNEL COSTS		
Purchased Services		
Meetings, Workshops, Convening, etc.		
Supplies & Material		
Travel		
Evaluation		
Capital		
Contingency (5-10%)		
TOTAL Direct Non-Personnel Costs		
OVERHEAD & ADMINISTRATION		
TOTAL PROJECT COST		
Total Secured Funding		
TOTAL BUDGET REQUEST		

Grantors are more likely to consider proposals that show the applicant also has a stake in the outcome. Often a minimum of 10% Band or organizational commitment is necessary.

Part 2. Grant Writing → 12 Step Process

▶ Step 7: PROJECT BUDGET

- ▶ B) Create a budget justification → A budget justification provides numerical detail explaining how you arrived at the amounts in the summary
 - ▶ → include any quotes or estimates you receive (get at least 2 quotes; 3 is better)
 - ▶ In all circumstances, **make sure your amounts balance out**, meaning that everything adds up to the same numbers throughout the proposal.

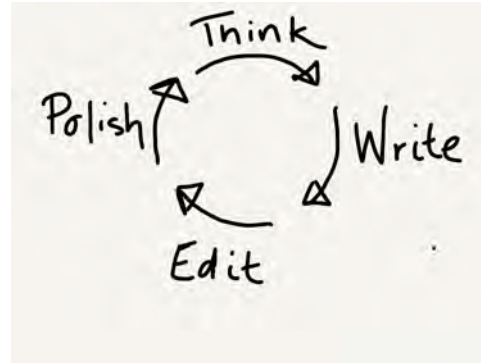


Part 2. Grant Writing → 12 Step Process

▶ Step 8: POLISH & PERFECT

▶ Make your proposal shine

- ▶ Go through & polish everything up
 - ▶ Are your ideas clear? Read it aloud and see how it flows
- ▶ Review your original summary - make sure it reflects the proposal you've written
 - ▶ Your ideas might have changed
- ▶ Know your reviewers
 - ▶ They commit about thirty minutes to each proposal



Nugget o' Wisdom: Try using some of the terminology outlined in the application form. Stay clear and concise.

Part 2. Grant Writing → 12 Step Process

▶ Step 9: STICK TO THE GUIDELINES

- ▶ Before you proofread, read & re-read the requirements & instructions
 - ▶ Every grant has rules and procedures that must be followed exactly as written; you don't want to be disqualified before your proposal has even been read
 - ▶ Pay attention to submission guidelines & to word count for each question



Nugget o' Wisdom: Most grantors have a 'Rubric' - if possible, obtain a copy of the rating rubric to know what the funding agency expects from reviewers.

Part 2. Grant Writing → 12 Step Process

▶ Step 10: PROOFREAD

- ▶ Show the funding committee that you take the proposal seriously by carefully proofing your proposal for spelling, typing, and grammatical errors.
 - ▶ Keep a look out for small details, such as a "there" that should be "their," an "it's" that should be "its," or a word that is commonly misspelled.
- ▶ Read it, re-read it, read it backwards, and read it again!
- ▶ Give yourself a couple of days for proofreading - you'll need some time away from your work to go at it with fresh eyes
- ▶ Have two additional people review your proposal



Part 2. Grant Writing → 12 Step Process

▶ Step 11: GET A SECOND OPINION

- ▶ Get out of your head and into reality
- ▶ Get at least two people who aren't a part of your team or professional sphere (they can be the same individuals who proof read your proposal) to read it
 - ▶ It's a great reality check: If they cannot explain what you are trying to do, chances are the grants committee won't either, and they won't fund what they can't comprehend.



Part 2. Grant Writing → 12 Step Process

- ▶ **Step 12: WRITE A COVER LETTER**
- ▶ This should include a summary of your request
 - ▶ The purpose of your project & the amount of money you are requesting
 - ▶ It should also list the contents of your proposal
- ▶ This is the grantor's first impression of you (if you haven't already met them in person)



Nugget o' Wisdom: You should invest as much time and care in the cover letter as you have in the other parts of the proposal.

GREAT! You've finished the bulk of your proposal - you're almost there ...

▶ FINAL STEPS & SUGGESTIONS:

- ▶ Proofread everything—again
- ▶ Double check everything
- ▶ Make a copy for your files
- ▶ **SUBMIT** → Make sure you mail or deliver it in time to meet the deadline
- ▶ **Follow-up!**
 - ▶ Give it time
 - ▶ Keep the grantor informed
 - ▶ Be patient
 - ▶ Positivity → Reviewer's comments are meant to be constructive



The Grant Writer's Checklist

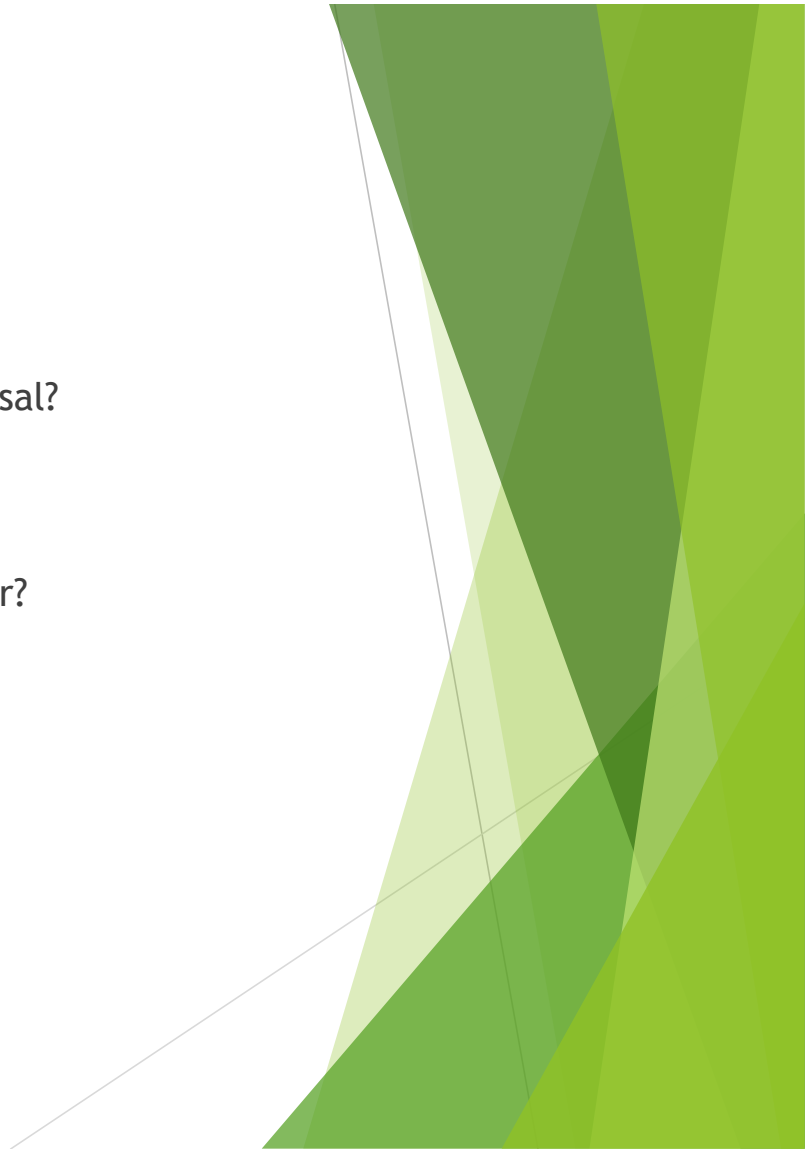
- ▶ **Your submission package should contain the following:**
 - ❑ Cover letter
 - ❑ Proposal or application
 - ❑ Project plan, summary, needs statement, goals & objectives, evaluation plan, sustainability plan, timeline, budget, etc.
 - ❑ Consolidated Financial Statements (case dependent)
 - ❑ Band Council Resolution (case dependent)
 - ❑ Additional materials
 - ❑ Photos of your project
 - ❑ Charts
 - ❑ Letters of support

A photograph of a wooden pavilion with a view of a snowy forest and a frozen lake. The pavilion has a wooden roof and thick wooden pillars. The background shows a dense forest of evergreen trees covered in snow, with a frozen lake in the distance under a clear blue sky.

**Your Turn to Review -
Evaluating a Sample Proposal**

Group Discussion

- ▶ What did you like/not like about the proposal?
- ▶ What were some of the strengths & weaknesses of this proposal?
 - ▶ In terms of its writing style & story telling
- ▶ How could you have changed it to make the proposal stronger?
- ▶ What comments do you think the reviewers made?



Wrap-Up Reminders

- ▶ Know your funding agency
- ▶ Read the guidelines (and then re-read them!)
- ▶ Tell a good story
- ▶ Connect to big issues and trends
- ▶ Write & re-write. Get the right expertise. Get input. Revise.
- ▶ If you give yourself enough time, it can actually be a fun and rewarding process - in the end, a successful proposal means making your project happen!
- ▶ Build relationships in the process, and it will ultimately build our new path!

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