



Grant Writing for Navy League Councils

A Workshop

Purpose: To present, discuss and practice the process of identifying grants opportunities, preparing a grant request and managing grant funds properly.

Learning Objectives:

1. Discuss the rationale for a council to apply for grant money.
2. Present an overview of the grantmaking process.
3. Review strategies for identifying appropriate grant funds that a council might use to seek funds by applying for a grant.
4. Discuss the process for preparing a grant request.
5. Prepare a grant request using material describing an actual grant opportunity.
6. Review the requirements for managing grant money - accounting, reporting and closing a grant account.

- Agenda:**
1. Brainstorm the Question: "Why should councils seek grant money?"
 2. Present an overview of the process for obtaining a grant.
 3. Evaluate various strategies for identifying grants that may be appropriate for your council (exercise).
 4. Present guidelines for preparing a grant request, then prepare a request using an actual grant description (exercise).
 5. Discuss the requirements for managing grant funds and reporting results of fund usage.
 6. Plan next steps.

Limit: One hour plus two 1-hour exercises.

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What are grants and why should we care?

Few Navy League councils apply for and receive grants to support their programs and events, even though these activities may be eligible for a grant (or two). Grants are specific amounts of money normally made through charitable foundations or by business entities *to support activities the grantmaker selects.*

The first question your council needs to ask is "What programs and activities sponsored by your council may be eligible for a grant?" Let's survey the collective knowledge of the group to determine how much we know about activities eligible for grants.

Take a minute to think about your council's programs and activities, then decide whether this program or activity is eligible for a grant. Write your ideas below and share them when asked during the discussion.

<u>Council Programs & Activities</u>	<u>Is this program or activity eligible?</u>

This list will be used for developing our Grant Writing Strategy later in the workshop. Before we start development, we need to review the grantmaking process.

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The Grantmaking Process

The process of applying for a grant described below must be followed to assure success. The steps in the process include:

1. Identifying council activities that may be eligible for a grant;
2. Searching for grantmakers who may support the council's activities identified in step 1;
3. Preparing a grant request to selected grantmakers;
4. If successful, implement the activities described in the grant application;
5. Prepare and submit reports required by the grantmaker or described in the grant request; and
6. Complete the grant activity, make final reports, and determine whether additional grants may be requested.

Each of these steps is discussed below and appropriate exercises are presented to support completion of the step.

Who are these Grantmakers?

Generally, grantmakers may be any of the following types of organizations:

- private foundations, normally established by either an individual or a corporation;
- corporate foundations, normally managed within the company;
- government agencies - federal, state, county or city; and
- community foundations, which may receive funds from any or all of the other grantmakers.

Many large grantmakers are looking for national organizations involved in national programs. Therefore, local councils have the highest probability of success if they focus on local resources, either government based (city, county, state), local corporations and community foundations.

What do Grantmakers Support?

In general, grantmakers have a *cause* that they want to support with their funds. Examples include arts & culture,

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environment, community/economic development (especially high technology), education, community services - affordable housing, elder care, mass transportation, youth activities, etc., leadership, health & human services, and human & race relations.

Starting the Process

Since grants are normally awarded for projects, the council Board of Directors must be involved in the process to ensure that the board is committed to projects being proposed. Your council doesn't want to obtain a grant and then be forced to return the money due to lack of resources to execute the proposed project (**yes, this has happened to a council!**). Ideally, the board should authorize the *project*, the *approach* and the *resources* before the grant writer begins.

The starting point for identifying potential grant-worthy projects is to review the Navy League Mission and Goals. We support public education, sea services personnel & their families, and youth. What types of projects might support increasing your support of these goals? Let's look for answers by completing an exercise to identify such activities.

Exercise

Purpose: *To identify areas with grant funds and prepare a list of potential projects in each area.*

Action:

- 1. Prepare a list of current activities and programs supported by your council. Identify those activities that support a Navy League goal.*
- 2. Brainstorm, as a group, the answer to the question "What current or proposed activities align with typical grantmaker causes?" Use the brainstorming process described in Appendix A. List them in the matrix below.*

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<u>Navy League Goal</u>	<u>Current Programs</u>	<u>New Programs</u>	<u>Grants Available</u>
Educate national and local leaders and the nation	1. _____ 2. _____ 3.		
Support the men and women of the sea services	1. _____ 2. _____ 3.		
Provide assistance to sea service families	1. _____ 2. _____ 3.		
Support youth programs	1. _____ 2. _____ 3.		

3. Sort the proposed projects into grant categories, as follows:

- Arts & Culture
- Environment
- Community/Economic Development
- Education
- Community Services - Youth
- Leadership
- Health & Human Services
- Human & Race Relations.

Select 3-5 potential projects from this list for further analysis, as described below.

4. Prepare an action plan to gain approval/consensus for each proposed project before initiating a grantmaker search. The project action plan should include scope of the project, resources currently available, and

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additional resources needed (for example, is a partner required?). Project details will be determined when grantmakers have been identified.

<i>What action is needed?</i>	<i>Who will complete the action?</i>	<i>When will action be completed?</i>	<i>Remarks</i>
<i>Project:</i> <i>Scope</i> <i>Current Resources</i> <i>Needed Resources</i>			
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<i>Project:</i> <i>Scope</i> <i>Current Resources</i> <i>Needed Resources</i>			

- Schedule a follow-up meeting to review progress and complete the final list.*

Limit: *This exercise should take 30 minutes.*

Searching for Grantmakers

Public Grantmaker Search

Government grants can be found in publications listing grantmakers (see handout), online at www.grants.gov (for Federal agency grants), or from local government listings. Most councils will discover that the most promising source of grants is local. For example, in Charleston, SC, the following organizations administer public grants:

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- State of South Carolina Government, Research and Grants Administration, College of Charleston Office of Research and Grants, www.orga.cofc.edu.
- City of North Charleston, Community Development Block Grants, www.northcharleston.org.

Generally, local government grants can be a good source of funds. Let's briefly review two successful grant applications (see handout).

Private Grantmaker Search

Once again, publications can be searched for grants. However, most public libraries subscribe to the Foundation Center Directory Online, which can be searched in detail for available grants (see handout).

The Foundation Center also has a public website with a limited search capability. When we search for Charleston, SC at <http://lnp.fdncenter.org/finder.html>, we get the following results:

Search criteria: (City: Charleston, State: SC)
67 matching documents retrieved

FOUNDATION NAME	STATE
Ackerman Foundation Trust, Bill, Jennie and Harry	SC
Addlestone Foundation, Inc., Nathan and Marlene	SC
Alexander Foundation, Saul	SC
Alliance for Full Acceptance	SC
Atlantic Services of Charleston Charitable Trust	SC
Barkley Foundation, The	SC
Bonds Charitable Trust, James R.	SC
Bonner Foundation, Elizabeth Calvin	SC
Bosch Fair Share Fund, Robert	SC
Breaux, Jr. Foundation, Inc., Prosper Paul, The	SC
Bunting Foundation Trust, Ethel-Jane Westfeldt	SC
Carolina Children's Charity, Inc.	SC
Ceres Foundation, Inc., The	SC
Charleston Futures	SC
Charleston Scientific & Cultural Educational Fund	SC
Charleston Union of Kings Daughters	SC
Citadel Foundation, The	SC
Clergy Society	SC
Coastal Community Foundation of South Carolina	SC
Cohen Endowment Fund, Sol and Celia	SC
CRPA Foundation, Inc., The	SC

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Dumas Trust, Mendel SC
Edwards Foundation, Inc., Christopher SC
Father-To-Father Project, Inc. SC
Feng Li Li Foundation SC
Hallie Hill, Inc. SC
Hebrew Orphan Society of Charleston, SC SC
Huger Home Charitable Trust, William SC
InterTech Group Foundation, Inc., The SC
Invest in Children Foundation, Inc. SC
Lader Foundation, Philip and Linda LeSourd, The SC
Ladies Benevolent Society of the City of Charleston SC
Leadem Family Foundation, Richard and Susan SC
Lindstedt Charitable Trust, Barbara M. SC
Lowcountry AIDS Services, Inc. SC
Magnolia Plantation Foundation SC
McClain Foundation, Inc., Frank and Mary Lee, The SC
McClary Foundation, Inc., Reader Mood SC
McFadden Foundation, Inc. SC
Mevers Foundation, "Sonny", The SC
Muller, Jr. Trust, John D. SC
Murrill Foundation, Inc. SC
Palmetto Association of Independent Schools, Inc. SC
Patrick Family Foundation SC
Post and Courier Foundation SC
Reams Foundation, Inc., The SC
Richardson Trust, Helen SC
Rivers Foundation, Inc., John & Kathleen, The SC
Sherman Family Charitable Trust, The SC
Slocum-Lunz Foundation, Inc. SC
Society for the Relief of Families of Deceased & Disabled
Indigent Members of the Medical Profession of the State of
South Carolina SC
Sokol Charitable Trust, Rose and Joseph SC
Sottile Foundation SC
Spaulding-Paolozzi Foundation, The SC
Staats Trust, Henry P. SC
Strange Memorial Foundation, Matthew SC
Taylor Family Foundation, The SC
Telios, Inc. SC
Trident United Way, Inc. SC
Verhagen Foundation SC
Warren Family Foundation, James R., The SC
Westvaco Corporation Employees Charitable Contributions
Plan SC
Whitfield Family Charitable Trust SC
Wilford Foundation "Cornflower Trust", Jane and Sykes SC
Winthrop Charitable Trust, John SC

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Women Making a Difference SC
Zucker Family Foundation, Inc., Jerry and Anita, The SC

A list of funding organizations, as above, does not provide the grant writer with the information necessary to prepare a grant request. However, the address, contact information, and assets available for grants can be obtained from this resource. If the Foundation Directory Online is not available at your library (or another grants office, such as a local government office), this listing can be used to contact the grantmaker to explore grant opportunities.

Community Foundations

Most councils will find the best opportunity for grants by searching at their local community foundation. Some of the grantmakers identified in both the government and private grantmaker search may also be found by searching your local community foundation. Community foundations are also a resource for education and assistance in grant preparation. For example, in Charleston, SC, the Coastal Community Foundation of South Carolina, www.ccgives.org, offers many services (see handout). A similar community foundation is found in Savannah, GA (Community Foundation of the Low Country, Inc., www.cf-lowcountry.org), and Atlanta, GA (The Community Foundation for Greater Atlanta, Inc., www.atlcf.org).

The Grant Application

The grant application is the most important element of successful grant seeking. A skilled grant writer is critical to selling your grant proposal. Developing this talent is possible if the ideas presented below are considered when preparing a grant proposal. This section of the workshop relies on the use of the Navy League Guide "Grant Writing for Non-Profits". To start, let's review the **General Process Guidelines**, page 5, of the guide.

The first step is to learn the procedure the grantmaker follows to solicit grant proposals. The typical process may involve 1) invitation, 2) two-steps, or 3) direct proposal. The process is described in the *application information* section of the grantmaker's guidelines.

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Invitation. Many grantwriters are not seeking unsolicited proposals, but this restriction does not necessarily prevent your council from being *invited* to submit a proposal. Before your council seeks an invitation, the grant team should have developed the project concept intended for the request; the project should align with the grantmaker's guidelines. The secret to being invited is to approach a member of the Foundation Board of Directors who is an acquaintance or associate of someone in your council (preferably someone on your council Board of Directors). Personal contact to identify the opportunity your proposal offers can win the day and earn your council an invitation.

Two-step. Many grantmakers want to consider projects that have been *pre-screened* using a preliminary proposal process. The *inquiry letter* must convince the grantmaker that your project aligns with the grantmaker's guidelines *and is an innovative or creative approach* to achieving the objectives of the grantmaker's cause. The format and content are described in the **Preliminary Proposal** section of the guide, pages 6-9.

Full Proposal (one-step). Preparing a full proposal requires many things - a creative project idea woven into a story, compelling statistics to support the story, and a solution that creates an "ah-ha" moment (the solution is obvious!!). Fundamentally, the proposal must meet all the grantmaker's priorities, deadlines and timetables described in the guidelines. The components of a **Full Proposal** are described in the guide on pages 10-16, which we will now review. Remember, innovative and creative approaches have the greatest potential of winning a grant award. The writer's skill in telling the story can carry the day. Let's look at two *successful proposals*, each of which earned a **six-figure grant award** for the council.

Exercise

Purpose: *To identify the components of your "Proposal Story" for one of your projects.*

Action:

- 1. Using the Grantmaker Guidelines provided for this exercise, select one of your projects identified in the previous exercise for a grant proposal.*
- 2. As a team, develop the "story" that would describe your project. Start with an outline,*

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then expand the story to incorporate statistics that support the "Ah-Ha" climax. Confirm that the key elements of the grantmaker guidelines have been addressed.

3. Determine who on your team will complete each component of the proposal, as described in the grantmaker guidelines and using the guidance in the NLUS Guide.

Limit: One hour

Grant Award Procedure

The process used by the grantmaker is normally described in the guidelines. Proposals should be submitted by the deadline and receipt confirmed. Your council should determine when the award will be made and follow-up after the award date to confirm acceptance or rejection of the proposal. Requesting feedback on the proposal, if granted, will help your grant team and your grantwriter improve their proposals in the future.

When an award is made, the council should confirm that the activities, schedule, and deadlines are satisfactory. Once a grant is funded, initiate the activities described in the proposal on schedule unless the award is late (confirm the new schedule if this happens).

Reports

Grantmaker guidelines often include reporting requirements. Expenditure of public or private funds must be accountable, so the budget for the project *must be kept separate from all other funds*. Remember, your council financial records are public, so due diligence on the use of grant funds is essential to continuing as a non-profit organization in your community.

Final Report

Some grantmakers want a final report that describes the accomplishments of the project compared to the goals and objectives described in your grant proposal. Remember, data speaks about results! Your proposal should have included the metrics that would measure project progress, and a goal that determines success. Successful projects often lead to additional funds from the grantmaker.

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Appendix A - Brainstorming

Your discussion leader will lead you in a *structured* brainstorming session. The session will have three phases (steps):

1. Generation
2. Clarification
3. Evaluation

Brainstorming is *always* conducted to answer a question. The question is written on the easel pad or board so that the group can focus on possible answers. Here's the process:

Generation: During the generation phase, we want to collect the ideas of the participants in the quickest, most efficient manner possible. We accomplish this objective by following the **Rules of Brainstorming** below:

- Only one person may speak at a time.
- All ideas are recorded on an easel or board and kept visible to everyone.
- Express your idea using the KISS principle (short and sweet).
- Each person contributes only one idea when it is his or her turn.
- Everyone is given a turn in sequence.
- It's OK to pass if you can't think of another idea.
- Don't repeat ideas already listed.
- Build on the ideas of others.
- **No interruptions, criticism or discussion of ideas as they are being generated!**

Clarification: The clarification phase gives everyone an opportunity to ask questions about any idea listed. The objective of this phase is to ensure that everyone has the same understanding of the idea that has been recorded.

Evaluation: The evaluation phase gives the group an opportunity to combine ideas that are similar and eliminate ideas that don't appear to fit the question.

Any questions? Then let's get started. Use the question proposed by the discussion leader, or write an appropriate question that better identifies the brainstorming subject.

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