



"I'm a fiction writer in the grant-proposal genre."

# Grants 101

## How to Research and Write a Grant

Massachusetts  
Department of Conservation & Recreation  
2019 MassTrails Conference  
November 1, 2019

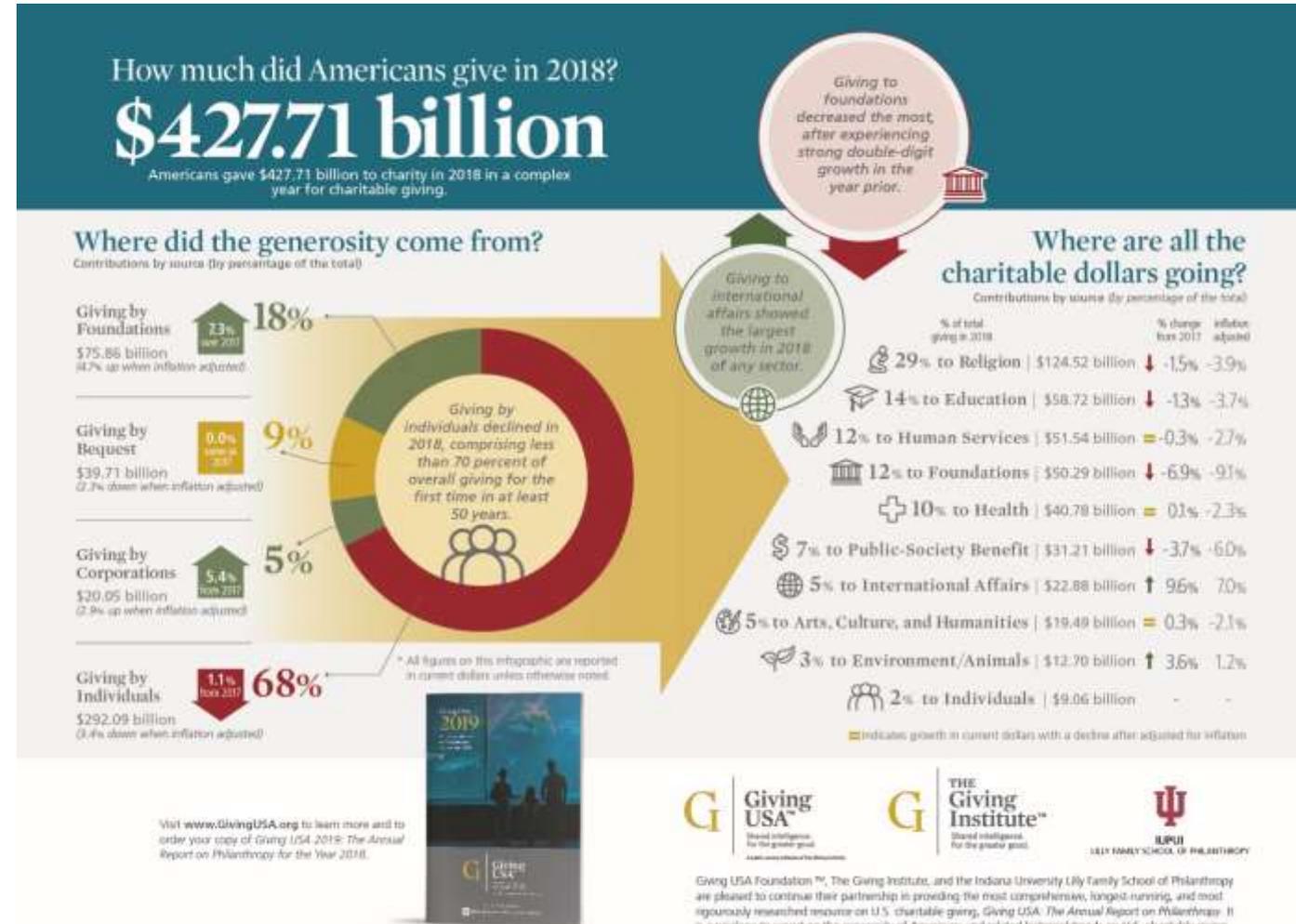
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# Agenda

- Introductions
- Foundation Landscape
- The Fundraising Cycle – Research, Cultivation, Solicitation, Stewardship
- Budget Tips
- Proposal Tips
- Sample Funders
- Q&A

# Philanthropy Landscape

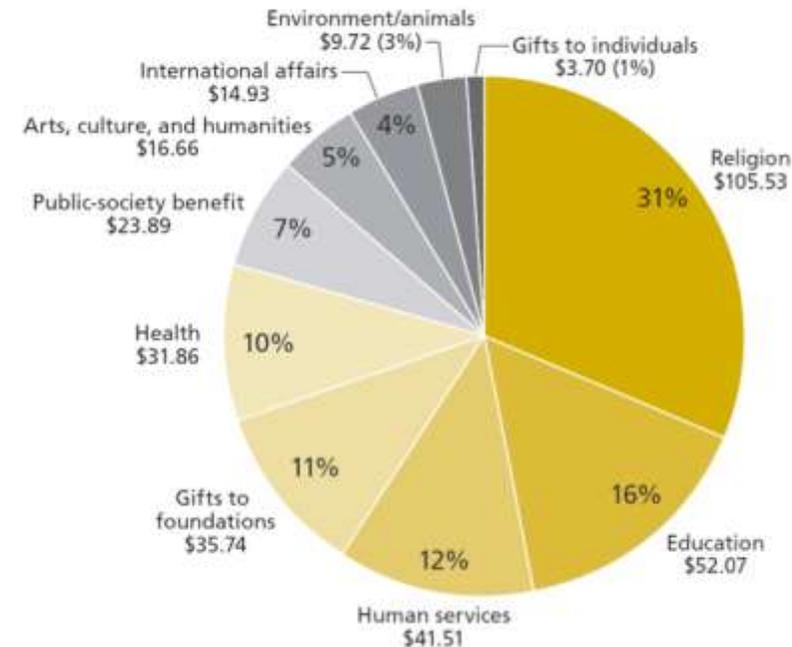
- Of **\$427.71B** in private giving in the U.S. in 2018:
- **18% from foundations** (growing share up from a stable 15% for many years)
- **Individuals (living): 68%** (decreasing from 71% last year – new tax law to blame? growing inequality?)
- **Bequests (individuals after death): 9%**
- **Corporate (excluding corporate foundations): 5%** (same % for decades)



SOURCE: Giving USA Foundation | Giving USA 2019

# Environmental Philanthropy

- **Only 3%** of overall philanthropy to environment: \$12.70B in 2018
- Giving to environment/animals increased 1.2% in 2018, one of only two sectors that saw an increase; has been increasing over the past three years.”
- **About 7%** of foundation funding to environment



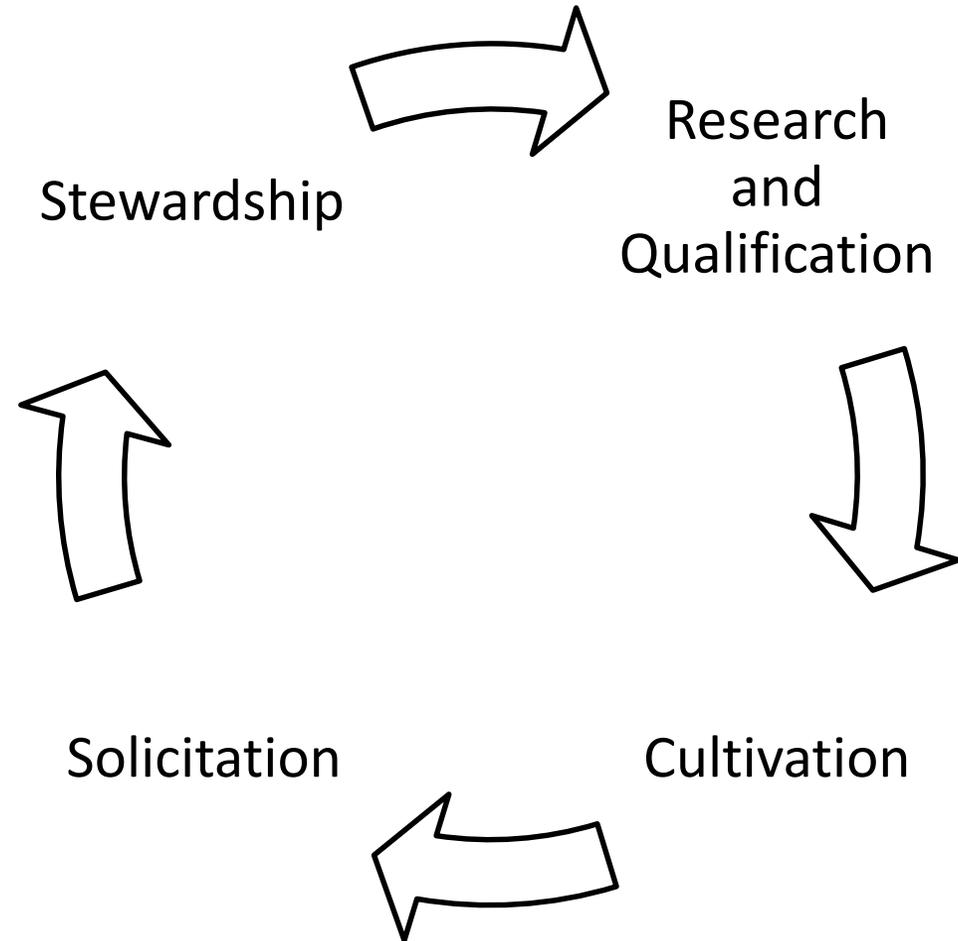
SOURCE: Giving USA Foundation | *Giving USA 2019*

# Foundation Funding for Environmental Issues

- The top three most funded primary issue areas within Environment in 2013:
  - Biodiversity & Species Preservation (22%)
  - Energy (13%)
  - Coastal & Marine Ecosystems (10%)
- Funding for Sustainable Agriculture & Food Systems grew 52% from 2011 to 2013, making it the fourth most-funded issue area

Source: Tracking the Field: Volume 5, Analyzing Trends in Environmental Grantmaking, Environmental Grantmakers Association

# The Fundraising Cycle



# Research

- Online search tools (fee-based):
  - Foundation Center's Foundation Directory Online (FDO): <https://fconline.foundationcenter.org> (subscription only, but available at Boston Public Library, Worcester Public Library and other select libraries)
  - Philanthropy Massachusetts (formerly Associated Grant Makers) Grant Makers Directory (GMD): <http://www.agmconnect.org/>
  - Foundation Search [www.foundationsearch.com](http://www.foundationsearch.com)
  - GrantStation (free with Grant Professionals Association membership)
- Free online search databases: <http://grantsandmore.org/resources>
- Board members, program staff, conferences
- Other organizations (annual reports of peer organizations, organizations in your town/region)
- Foundation web sites
- **Not all qualified prospects will result in funding**

# Cultivation

- Reach out to foundations
  - Introductions, phone calls, emails, meetings
- Treat meetings with program officers as an informational interview
- Prepare a concise project description and demonstrate the connection to the funder's goals
- The goal is to secure an invitation to submit a proposal to fund a specific project
- Make sure the program you are seeking funding for is a true fit for the foundation and for your organization
- Don't let a "no" answer deter you from a prospect; they might be interested in another area of your work – have a menu of options ready.

# Solicitation

Proposals and Letters of Intent (LOIs) should demonstrate:

- The need (why) and urgency (why now)
- Goals & objectives
- What you intend to do with funding (how)
- Target population (who) and location (where)
- Timeline (when) & workplan (what)
- Budget (how much)
- Measurable outcomes with metrics, indicators – so you can prove your results
- Why your organization is best suited to do it
- Connection to the donor's mission
- Other partners and funders – shows community support
- Organizational and program capacity and sustainability

However, funders don't always need every detail to understand the project and see if it's a fit with their focus and mission

# Stewardship

- Timely acknowledgement and follow-up
- Regular reporting and updating
- Building relationships
  - Press clippings, phone call updates, invite for a site visit or to an upcoming event, send annual reports, success stories, links to videos
- If project changes after a grant award, communicate with the funder, explain why, and ask for additional time to complete the deliverables, if necessary
- Funder should feel they are part of the project, their support makes your work possible

# Project Budget

- From a reviewer perspective, the budget is the most important part of the proposal
- Not just numbers, a budget tells a story ...about the project *and* the organization
- Do not let the budget be an afterthought
- Start your proposal by building the budget and use the narrative to describe the activities in the budget
- The budget and narrative should be seamless, with each task in the narrative clearly linked to a budget line
- Poor alignment of narrative and budget is one of the most common causes of poor scores

# Project Budget

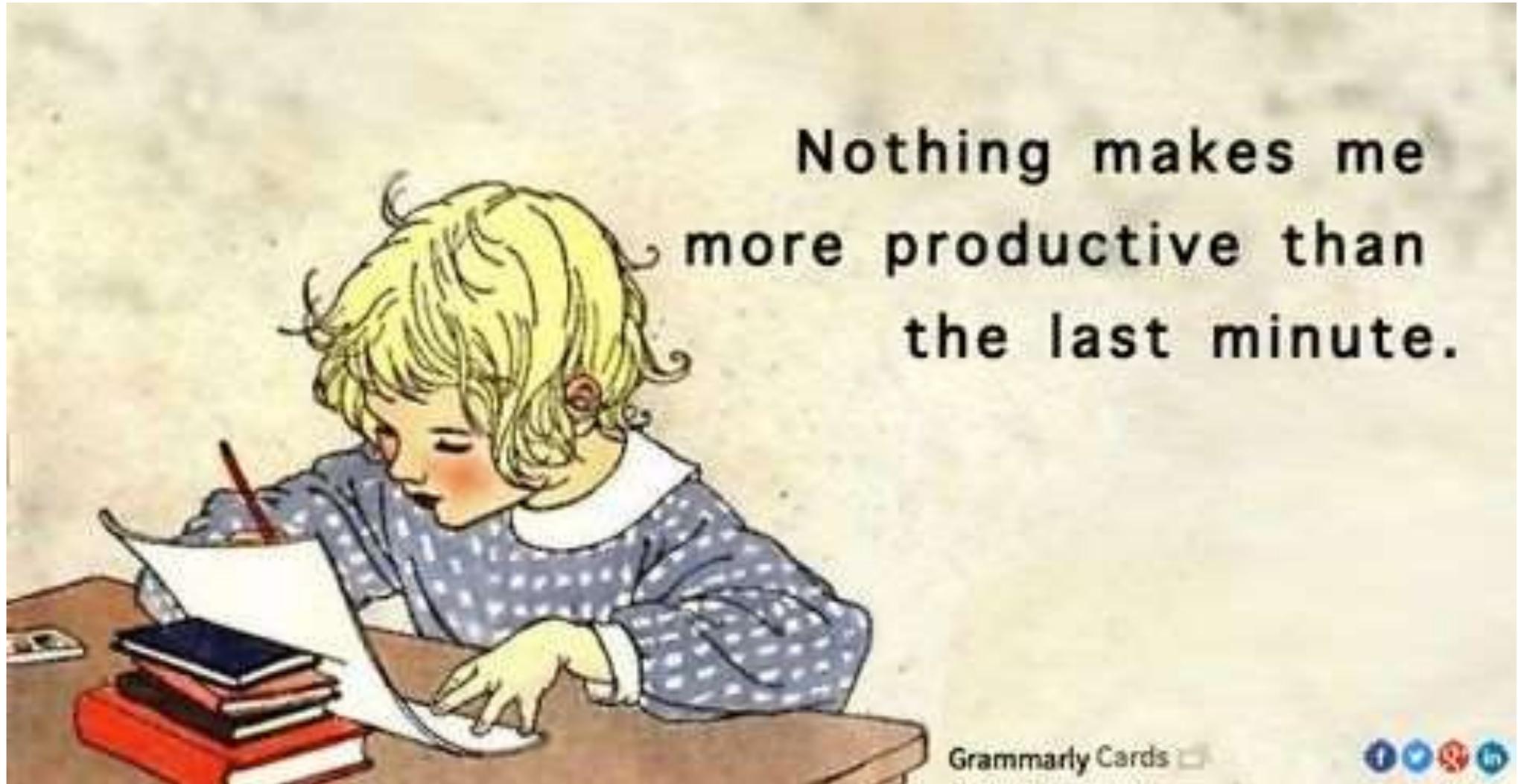
- Budget includes both expenses *and* income (sources of funding)
- Income and expenses should balance
- The budget and narrative should be seamless, with each task in the narrative clearly linked to a budget line
- Keep it simple – one page typically, two pages okay with budget notes/budget narrative
- Don't inflate costs or pad estimates – funders see through it
- For capital or equipment requests, cite quotes or estimates, web sites with costs, etc.

# Budget Tips

- Just because you can ask for the maximum doesn't mean you should. Request amount should be appropriate to organization size, proposed program size, and funder's award history.
  - Hint: if funder award history isn't easily found, look at the foundation's Form 990-PC tax filing for recent years – go to Guidestar or Candid/Foundation Center)
- It is hard to justify a maximum request in the budget
- Grant programs have budgets too. Funders want to fund as many projects as they can. Many funders would rather fund many smaller projects than one large one.

# Proposal Writing Tips

- Be clear, organized and succinct
- Avoid lingo, jargon, acronyms not defined
- Avoid fluff words, phrases and clichés
- Know your audience – tailor to the foundation's interests as much as possible (but try to avoid pandering or parroting their exact phrasing)



Start early – especially if letters of support, memoranda of understanding between partners, contractor quotes, or other things needed from third parties

# Proposal Tips



- Rule #1: Follow the guidelines!
- Honor deadlines: “No, you can’t have an extension.”
- Don’t over-promise – funders see through it
- Details matter: proofread, check math on budgets



Get a second or even third person to review a proposal before submitting

Get Apostrophe Man (or an editor) if you are challenged like the kid kneeling in this picture

# Proposal Readability Tips

- Use headings and subheadings to make it easy to read and locate information, the various components (e.g., Need section, Organization Background/History, etc.)
- Times New Roman 12-point font
- One-inch margins
- Readability Statistics
  - Flesch Reading Ease (60-70% best, hard to do)
  - Flesch-Kincaid Grade Level – never above 12, aim for 10 (again, hard to do)
  - Easiest readability – 3 sentences per paragraph; 12 to 15 words per sentence; 10-20% passive sentences

# Think Like a Funder

- A government grant is issued to advance a state policy or goal. A private grant is issued to advance a donor's philanthropic intent.
- Think about your proposal not as asking for money, but selling a service.
- Think of a creating your proposal the way you would like to see a proposal from a contractor.
  - Discuss what needs to be done
  - Describe why it needs to be done
  - Describe why you are the best one to do the job
  - Provide price, timeline, and deliverables
- Funders talk to each other about organizations applying for grants – past performance? Timely reports?

**“It’s not about you. It’s about them.”**

# Cross-Sector Funding Potential for Environment?

- Education funders for environmental education programs
- Hunger issue funders for sustainable agriculture, urban gardens (e.g., Project Bread, some faith-based funders)
- Funders for health & nutrition, promoting physical activity (e.g., gardening, farming, trails), or preventing childhood obesity – for sustainable agriculture, community gardens, or even trails – examples: health plan foundations like Reliant Medical Group Foundation, Blue Cross Blue Shield of Massachusetts
- USDA grant programs for local agriculture, community farms
- Youth development funders for urban gardens that engage youth
- AmeriCorps members for trail construction/maintenance
- Specific population funders for agriculture programs that engage specific populations (e.g., refugee/immigrants, veterans, prison populations)
- Workforce development grants if you are training new farmers or developing markets for a new generation of farmers

# Cross-Sector Funding Potential for Trails?

- Capital funders – small funders for trailhead kiosks, signage (e.g., Fields Pond, local rotary and civic clubs, local banks, grocery stores, WalMart)
- Trail near senior housing or senior center? Funders for healthy aging, elders (e.g., AARP has grants, Tufts Health Plan Foundation)
- Trail near school? Funders for youth physical activity, community recreation
- Local garden clubs?
- Local/regional disability funders for trail access projects
- For multi-use trails that include bicyclists, People for Bikes, Rails to Trails Doppelt Fund (both very competitive); local bicycle clubs have funds too
- New England Grassroots Environment Fund may fund advocacy, education around trail projects
- Compete nationally? The KEEN Effect, Patagonia Environmental Grants, REI (start at store-level), Clif Bar Family Foundation all have grant programs

# Sample Environmental Funders in Massachusetts

- Amelia Peabody Charitable Fund – has traditionally funded capital campaigns for land conservation
- Jane's Trust – large grants \$50,000 and up; very difficult/competitive
- Cabot Family Charitable Trust – flooded with many types of requests
- National Fish & Wildlife Foundation
- Other traditional funders, many small: Fields Pond Foundation, Wharton Trust, New England Grassroots Environment Fund, Orchard Foundation, Green Leaf Foundation, Norcross Wildlife Foundation, Prospect Hill Foundation, others
- Community foundations – check your local CF for guidelines and to discuss other possible funding sources
- State programs through EOEEA, Mass Environmental Trust (water quality focus), Mass Wildlife (e.g., land acquisition grants), DCR MassTrails Program, Mass Department of Agriculture for sustainable agriculture
- Foundations that fund environmental projects in your specific city/town/region e.g. Island Foundation in New Bedford, Horizon Foundation funds on Cape Cod

# Questions? Thoughts?

Thank you!

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