

## Forensic Fundraising: Solving the Mystery of Grant Writing

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“Fundraising is a lot like crime scene investigation, except, of course, for the corpses lying around.”

- Brian Smith, Custom Development Solutions, Inc.

## ICEBREAKER

What do the following words mean to you?

- Fundraising
- Grant/Proposal



## FUNDRAISING 101

## Why Fundraise?

- Offer new programs
- Make existing programs better
- NOT to 'just pay the bills' (*Though general operating costs are a thing!*)

## Moneymaking v.s. Fundraising

- Moneymaking includes activities that will create a profit to support your program
- Fundraising is the creation of a long-term relationship with people who are truly interested in your programs.

## Main Steps of Fundraising

Making the right ask, at the right time, to the right person, for the right amount through:

- Identification
- Cultivation
- Solicitation
- Stewardship

## The Fundraising Pyramid



## Solving the Mystery of Grant Writing

## STEP 1: APPROACH THE SCENE

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#### Know your Project

- Look at the project you are soliciting for
- Know all the details and understand it well

### STEP 1 (Continued)

#### Know your Funders



- First time funder will need additional research\*
- Returning funders - confirm you still meet requirements
- Funders can come from various sources

**STEP 1 (Continued)****Have a strong *case for support***

- Is it Innovative? Unique? SMART?
- Does it have a measurable impact?

**\*FANTASTIC FUNDERS...**

... and where to find them:

- Word of Mouth
- Peers / Board Members / Associations
- By Invitation Only
- Through Research (E.g. Online directories, Google, CRA)

**Step 2: PRELIMINARY SURVEY****Step 2: Preliminary Survey****Review Guidelines**

- Funding Interests
- Geographical Scope
- Any Restrictions



## Step 2 (Continued)

### Read over ALL questions (Online Applications)

- Helps to confirm you have all project info ready
- Write a checklist and mark things off



## Step 2 (Continued)

### Confirm Match

- Prioritize funders

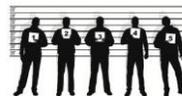


## Step 3: CONDUCT A DETAILED SEARCH

### Step 3: Conduct a Detailed Search

#### Round up the “usual suspects”

- Interview all potential resources
- Include program staff, finance, participants, past funded orgs AND grant funder



### Step 3 (Continued)

#### Collect all necessary data

- Case for support, impact statement, budget, testimonials



### Step 3 (Continued)

#### Have a solid budget

- Hardest thing sometimes to get = often most important
- Include both expenses AND expected revenue



## Step 4: RECORD ALL EVIDENCE

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#### Complete 1<sup>st</sup> draft

- Use descriptive language, but be concise
- Narratives are welcome when describing need\*
- Goals = broad / objectives = detailed / outcomes = measurable



## Parts of a Proposal

See Proposal Template Handout



## Demonstrating Need

- What if you didn't exist?
- What makes you unique?
- What issues do you address?
- What's your impact on those you help?
- What's your local and national context?

## \*Using Narratives

**When describing project:** include true facts

**How you present those facts =** more persuasive, comprehensible, enjoyable

**Tell a story:** employ characters, setting, plot and conclusion (e.g. who, what, where, why, when, etc.)

**Keep it positive:** explain how a project with severe need can lead to a successful impact

## Reduce, Re-use, Recycle

**Reduce:** Word count - especially in online applications; keep paragraphs brief but comprehensive

**Re-use:** Funders own key words /statements that match your project's focus or goals

**Recycle:** Sample past winning proposals (when possible)

## Power Words

**When describing program:** unique, enable, catalyst, strong, leader

**When describing goals:** decrease, deliver, establish, improve, increase, produce, provide

**General descriptive words:** genuine, successful, experienced, revolutionary, helpful, useful, achievable, projected, effective

**Avoid:** Fuzzy words, unnecessary jargon, dispassionate or negative tones

## Step 4 (Continued)

### Gather attachments

- Financial statements, list of BOD, annual reports



## Step 4 (Continued)

### Photos & Testimonials

- These are often encouraged
  - file under 'additional info'



## Step 5: FINAL SURVEY

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### Revise

- Get a 2<sup>nd</sup> set of eyes to read it over  
(e.g. Someone who's not connected)



## Step 5 (Continued)

### Review

- Collect various input
- But try and limit versions



## Step 5 (Continued)

### Return

- If possible, let it sit for a day, then go back to it with a 'fresh' take



## Step 6: RELEASE THE SCENE

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### Finalize Application

- Final revision, format, all attachments

**COMPLETED**

## Step 6 (Continued)

### Prepare for Follow Up Questions

- Especially if funder gives notice that this is just a primary step

FOLLOW UP



## Step 6 (Continued)

### Submit Everything

- Make copies - for you, for finance, for funder
- Send it off as required - online, e-mail, snail mail



**KEEP  
CALM  
IT'S  
ALL  
OVER**

**It's over!**

**It's done!**

**Or... is it?**

**WHAT NEXT?****What happens if you AREN'T funded?**

- Can you contact funder for feedback?

**WHAT NEXT?****What happens if you ARE funded?**

- How will they inform you? When will you know?
- Who should you notify?
- Say THANK YOU as soon as you find out!

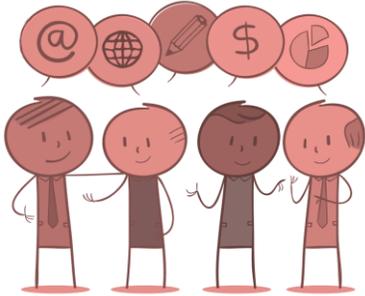
**WHAT NEXT?****Reporting?**

- What's required? When is it due?
- How can you show that you've made a major difference?

**FINAL TIPS**

Make a **checklist** - follow through  
 Build a **relationship** with funder whenever possible  
 Don't forget about the **attachments**  
 Cultivate your **'support group'**  
**Never guess** - always try to work it out  
 Always try and give yourself **enough time**  
 Ask for feedback and **SAY THANKS!**

## EXERCISES



### Sample Proposal

What is the problem/need that you plan to address?

Why is it important?

What is unique about your project?

Why should it be funded?

### Sample Proposal (Continued)

Who will benefit?

What is your overall goal?

What are your objectives?

How will you track outcomes?

What data can you use to validate?

Are there plans for sustainability?

### Sample Proposal (Continued)

What's your Vision/Mission

What's your history?

What are some of your successes?

Who are your experts involved with this project?

## Draft a Budget

What are your direct project costs?

e.g. Staff, venue, marketing & promotions, administration, evaluation, other fees?

**Any Capital Costs?**

e.g. Equipment, furniture, vehicles

**Overhead**

e.g. Rent, hydro, heating

## Prospect Matching

Using your example proposal, review the following prospects:

- Corporate Foundations
- Family Foundations
- Special-Purpose Foundations

QUESTIONS?



THANK YOU!

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