



# Grant Writing in a Pandemic World

## Proven Strategies To Increase Grant Funding

Presentation to Community Foundation for Northeast Georgia Nonprofit Academy  
Friday, March 26, 2021

# Wellspring Nonprofit Resource

**Mission:** Strengthen nonprofits through successful strategy to achieve sustained results

## **Strengthen Nonprofits**

More than 100 clients since 2005

## **Successful Strategy**

- Grant Writing
- Capital Campaign
- Event Planning
- Strategic and Business Planning
- Annual Fund
- Marketing and Communications

## **Sustained Results**

>\$100,000,000 raised since 2005





# Agenda

- **Introduction – Grant Writing in a Pandemic World**  
• *Elizabeth Hornbuckle, Wellspring Principal*
- **Meaningful Impacts | Addressing Social/Racial Equity**  
• *Amy Pauls, Wellspring Senior Consultant*
- **Lemons to Lemonade | Communicating Creative Solutions**  
• *Caroline Echols, Wellspring Principal*
- **Addressing the \*Asterisk\* | Quantifying 2020 Success**  
• *Elizabeth Hornbuckle, Wellspring Principal*
- **“Three E’s” | Virtual Communication**  
• *Matt Frankel, Communications Coach*



## Elizabeth Hornbuckle Wellspring Principal

- Fundraising for 31 years
- Expertise in Capital Campaigns, Grant Writing, Special Events and Annual Funds
- Fifth generation resident of Atlanta, dedicated to making a difference in the Greater Atlanta Community



**I. Documentation/Financial Stability**

**II. Human Capital**

**III. Track Record of Success**



## I. Documentation/Financial Stability

- 501 (c)3: Many Foundations want to see that it is at least two years old.
- State of your financials
  - ✓ Audit
  - ✓ 990
  - ✓ Annual Report and Strategic Plan
  - ✓ Well balanced donor portfolio
- Donor History/Grant Reports



## II. Human Capital

- Who is on the Board? How many? Are they qualified? Do they give?
- Who is on the Staff? How many? Are they qualified? Do they give?
- Who do you serve? How many? Do you make their lives better?



### III. Case for Support: Track Record of Success

- Need: Why you do what you do?
- Mission: What you do?
- Differentiator(s): Why are you unique?
- Impact Results: Demonstrate programmatic success?





## Amy Pauls

### Senior Consultant

- 32 years of fundraising experience
- Specializes in Capital Campaigns, Grant Writing, Individual Donor Cultivation, Solicitation and Stewardship and Annual Fund Campaigns
- Passionate about using her talents to serve non-profits and their constituents



**I. Equality vs. Equity**

**II. New questions in grant applications**

**III. Opportunities to improve organizational Equity**



## Caroline Echols Principal

- More than 31 years experience
- Specializes in Capital Campaigns, Grant Writing, Annual Funds and Donor Cultivation
- Passion for Philanthropy



- I. Importance of Communication
- II. Maintain Momentum
- III. Modify Services to fit the need



## Elizabeth Hornbuckle Wellspring Principal

- Fundraising for 31 years
- Expertise in Capital Campaigns, Grant Writing, Special Events and Annual Funds
- Fifth generation resident of Atlanta, dedicated to making a difference in the Greater Atlanta Community



- I. Quantitative Annual Program Metrics Chart – Look Different this year
- II. Qualify the changes by including Narratives in your reports
- III. Send out unscheduled updates
- IV. Call or zoom your top donors – personal updates



## Matt Frankel Communications Coach

- More than 18 years experience
- Coached clients to winning billions \$ worth of projects and sales
- Passion for helping individuals/organizations achieve their full potential



# The Three E's of Virtual Communication

I. Eye Contact

II. Energy

III. Engagement





# Appendix



## **What is Wellspring?**

We provide clear guidance and the means for financial success to both seasoned and nascent nonprofits and encourage every organization to grow to its fullest potential.



# Donor (Foundation) Development Cycle



## Touchpoint Types

- Site visit
- Face to Face
- Handwritten Notes
- Emails
- Letters
- Phone

## Touchpoint Content

- Events
- Newsletter
- Annual Report
- Videos
- Annual Report
- Strategic Plan
- Reporting
- Update on the project that didn't get funded



## Documents needed for Grants

- Name of organization/program,
- Tax ID#/501(c)3
- Mission
- History
- Program Description
- Strategic Outcomes & Objectives
- Evaluation
- Sustainability Plan
- Budget – 3-year comparative
- Audit
- 990
- Balance Statement
- Last year and Year to Date P&L
- Program Data – 3-year history
- Strategic Plan – Executive Summary/Full Plan
- Board List
- Staff Bio/Qualifications
- List of Donors
- W-9
- Direct Deposit Information



## Final tips to improve scores (note: be kind to your grant reviewer)

- Flesch Reading Ease Test and make your goal a reading ease score of between 60 and 100
- Write at a 6<sup>th</sup> to 8<sup>th</sup> Grade level
- Don't use jargon or acronyms
- Download and use the Grammarly or Hemmingway App



# SMART Objectives

*Specific – Measurable – Attainable – Relevant – Time Based*

What stamp is your organization going to leave on the community that improves the lives of clients & the health and well being of the community? Quantitative and Qualitative

<i>How much did we do?</i>	<i>How well did we do it?</i>
<p><b>1. How much:</b> # of families/individuals served</p> <p><b>2. How much:</b> # of referrals for support services i.e. mental health, medical, childcare, case management, legal and other services</p>	<p><b>3. How well:</b> #/% of individuals/families who have a case plan/ISP, agreed on &amp; active</p> <p><b>4. How well:</b> #/% of individuals/families who achieve at least 1 goal on ISP</p> <p><b>5. How well:</b> #/% of individuals/families who attend workshops (financial management life skills courses, interviewing skills, etc.)</p>
<b><i>Is anyone Better Off?</i></b>	
<i>Supportive Services</i>	<i>Housing Stability</i>
<p><b>6. Better off:</b> #/% of individuals/families who maintained employment for at least 30 days</p> <p><b>7. Better off:</b> #/% of individuals/families who gain income benefits</p>	<p><b>8. Better off:</b> #/% of individuals/families who obtaining stable housing</p> <p><b>9. Better off:</b> #/% of individuals/families who maintain stable housing for 90 days (3months) after assistance</p> <p><b>10. Better off:</b> #/% of individuals/families who maintain stable housing for 180 days (6months) after assistance</p>

# Identify: Who Will Fund Your Organization?

## I. Foundation Research Options

### Foundation Search

- <http://www.foundationsearch.com>

### GrantWatch

- <https://www.grantwatch.com>

### Community Foundation Locator

- <https://www.cof.org/community-foundation-locator>

### Chronical of Philanthropy

- <https://www.philanthropy.com>

### Foundation Center

- <http://foundationcenter.org>

### GrantStation

- <https://grantstation.com>

### Grants.gov

- <https://www.grants.gov>

### Instrumentl

- <https://www.instrumentl.com>

### GuideStar

- [www.guidestar.org](http://www.guidestar.org)





# Identify: Who Will Fund Your Organization?

## I. Foundation Research Options (cont.)

### Candid

<https://candid.org/>

- Aggregates multiple resources

### Foundation Directory Online

<http://foundationcenter.org>

- Essential: \$399/yr – one login
- Professional: \$1,499/yr – up to 10 logins at one time

<https://fconline.foundationcenter.org/welcome/quick-start>

- Free version – access to 100,000 foundations
- Also free at local libraries

### SunTrust

<https://www.suntrust.com/lp/foundation/funds>

### Bank of America

<https://www.bankofamerica.com/philanthropic/grantmaking.go>

### Wells Fargo

<https://www.wellsfargo.com/private-foundations/index>



# Identify and Qualify

## III. Foundation Ranking Grid – Go/No Go

Proposal Factors		Decision Criteria						Estimated Rating		
		Negative		Neutral		Positive		Our Agency	Competitor A	Competitor B
		1	2	3	4	5	6			
1	Foundation Contact and Rapport	Unknown or virtually unknown to foundation	Known to client, but not well known	Well-developed relationship with foundation						
2	Foundation Intelligence	No prior knowledge of foundation; project info limited to solicitation	Prior knowledge of Foundation, have collected adequate info	Distinct insights into Foundation needs and expectations						
3	Competitive Advantage	Competitor is strongly favored	Open competition with no apparent favorite	We are in favored position for contract award						
4	Qualifications and Experience	Marginally qualified, limited or no relevant experience	Adequately qualified but no real edge over competitors	Technically superior to most competitors						
5	Project Team Availability	Needed team members are too busy or in distant offices	Needed team members have adequate availability	Very strong proposed team with good availability						
6	Overhead/Operational funding Potential	Unlikely to make overhead on this project	Can meet overhead goals if well managed	High likelihood to receive overhead/operational funding						
7	Pricing Sensitivity	Selection primarily driven by price; commodity purchase	Client to balance price and qualifications in selection	Will select most qualified, then negotiate price						
8	Cost to Respond	High proposal costs relative to odds of winning	Proposal costs appropriate relative to odds	Excellent ROI; cost very appropriate for the odds						
9	Consistency with Strategic Plan	Opportunity not consistent with strategic plan	Opportunity fits within the strategic plan	Opportunity can't be passed up relative to the strategic plan.						
10	Odds of Winning	0-30% chance of winning	30-60% chance of winning	60-90% chance of winning						
11	Proposal Deadline	Immediate Deadline	Reasonable amount of time to complete the proposal	Proposal is 3 to 4 months away						
<b>Total Score</b> (sum of 10 proposal factor ratings)										
<b>Overall Rating</b> (total score divided by 10)										
COMMENTS: 1. The "Overall Rating" should be at least 4 before deciding to submit a proposal. 2. If the overall rating is less than 4, appropriate management approval should be obtained before proceeding with the proposal.							<b>DECISION:</b> <input type="checkbox"/> GO <input type="checkbox"/> NO GO			

# Evaluation Plan

1. Complete the first and second columns based on the evaluation questions and indicators

2. Identify the **data sources** for each of your indicators.

3. Indicate **how** you will get the information from your data sources.

4. Identify the **timeline** and the **person(s) responsible** for the data collection for each evaluation question.

Outcomes	Evaluation questions	Indicators	Data sources	Data collection methods	Timeline & person(s) responsible
Example: Increase student achievement by 30% by the end of the grant period as measured by test scores.	Example: Is the program increasing student academic achievement?	a. Students' increase in both math and language standardized test scores. b. Teachers report increased child participation in classroom and homework.	a. Published State Achievement Test results b. Teachers	a. Document review b. Interviews	a. November annually; teachers b. Bi-annually (fall & spring); evaluator11
1.	1.	a. b. c. d.	a. b.	a. b.	a.
1.	1.	a. b. c. d.			



# Evaluation Plan should Include

### SMART Objectives

- SPECIFIC
- MEASURABLE
- ACHIEVABLE
- RELEVANT
- TIME-BOUND

### Ways to show improvement:

- QUANTITATIVE DATA
- QUALITATIVE DATA



### III. Celebrate Success

- Send timely reports to the donor and let everyone know about your program success.

### IV. Turn failure into opportunity

- Did not achieve your metric? No worry, identify the barriers to success, make a plan to remove them, ask the donor to help you pay for it.





## Wellspring Nonprofit Resource, Inc.

### Contact Information:

Elizabeth Hornbuckle  
Elizabeth@wellspringresource.com  
404-543-0251

Amy Pauls  
Amy@wellspringresource.com  
770-356-9951

Caroline Echols  
Caroline@wellspringresource.com  
404-697-7346

Matt Frankel  
matt.frankel@gmail.com  
615-579-3420

