

TECHNOLOGY FUNDING SOURCES

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PLEASE ...



Turn off all cell phones or pagers!

PLEASE ...

THERE WILL BE SEVERAL TIMES
DURING THE PRESENTATION
FOR QUESTIONS.

PLEASE HOLD YOUR
QUESTIONS UNTIL THEN

USE CORRECT TERMINOLOGY

- Do not use "write a grant"
 - Write proposals in order to get a grant
 - Grant-seeker and Grant-maker
-

WHAT YOU WILL LEARN

- ❑ WRITING A PROPOSAL
 - ❑ RESEARCHING FUNDERS
 - ❑ CULTIVATING FUNDERS
-

TYPES OF FUNDING

- GOVERNMENTAL
 - FOUNDATION (PRIVATE OR PUBLIC)
 - CORPORATE
 - INDIVIDUAL DONORS
-

FUNDING RULES

- ❑ It takes 12-18 months to get funded
 - ❑ Specific programs are funded
not general operating requests
 - ❑ Diversify the funding
-

STEP 1

BEFORE YOU

START



NON-PROFIT STATUS

MUST BE INCORPORATED
BY A STATE AS A
NON-PROFIT ENTITY

501(c)3 STATUS

- IRS grants Tax-Exempt Status
 - If a group is controlled by a central organization...
 - Check with main group to see if it has been issued a group exemption letter that covers your chapter
 - If it has, you do not have to file a separate application
-

MISSION STATEMENT

WRITTEN SUMMARY OF
WHAT THE ORGANIZATION
WANTS OR HOPES
TO ACCOMPLISH

PROGRAMS OR SERVICES

- Organization should have a clear plan regarding programming
 - Programs that matter to the community
-

PLANNING PRIORITIES

- Start with your organization's needs
 - Seek funders that will want to help those needs
 - Don't find the funder first and then try to program for the funder
-

QUESTIONS ?



STEP 2

MASTER PROPOSAL

TIPS FOR WRITING THE PROPOSAL

- Program must be understood by others
 - Outline what you want to say
 - Avoid jargon
 - Humanize the issue
 - Keep it simple and generic
 - Revise and edit
-

PARTS TO A PROPOSAL

- Executive summary
 - Statement of need
 - Project description
 - Budget
 - Organization information
 - Conclusion
-

EXECUTIVE SUMMARY

- ❑ SUMMARIZES ALL THE KEY INFORMATION THAT FOLLOWS
 - ❑ WRITE IT LAST
 - ❑ KEEP IT TO 1 PAGE (ABOUT 300 WORDS)
-

NEED TO INCLUDE

□ PROBLEM (1-2 ¶)

- Brief statement of the need or problem

□ SOLUTION (1-2 ¶)

- What will take place
 - How many people will benefit
 - How and where the program will operate
 - Staffing
-

□ FUNDING REQUIREMENTS (1 ¶)

- Amount required
- How it will be funded in the future

□ ORGANIZATIONAL EXPERTISE (1 ¶)

- History, purpose and activities
 - Why you want to do the program
-

STATEMENT OF NEED

- Enables the funder to understand the problem the project will remedy
 - Enables the funder to learn more about the issues
 - Concise and persuasive
-

HUMANIZE THE ISSUE

- Use anecdotes
 - Provide real-life examples
 - Use actual quotes from participants
 - Emphasize the needs of the participants, not the organization's
-

POINTS TO INCLUDE

□ FACTS OR STATISTICS

- Should be accurate and current
- Must relate to your organization or program
- Needs assessments, surveys, reports, demographics etc

□ GIVES THE READER HOPE

- Situation should not appear hopeless
-

□ DIFFERENT THAN OTHER PROGRAMS?

- How does the program complement yet not duplicate other programs?
- Don't be critical of other programs or nonprofits

□ DON'T USE CIRCULAR REASONING

- The absence of your solution is the actual problem
-

CAN IT BE USED AS A MODEL FOR OTHERS?

- document how your solution can be used by others

IS THE NEED ACUTE?

- Is the problem you are addressing worse than others?
 - Does your solution make better sense than another?
-

QUESTIONS ?



PROJECT DESCRIPTION

OBJECTIVES

METHODS

STAFFING & ADMINISTRATION

EVALUATION

SUSTAINABILITY

OBJECTIVES

MUST BE

- Tangible
 - Specific
 - Measurable
 - Achievable within the timeframe
-

EXAMPLE

□ GOAL

- Our afterschool program will help children read better

□ OBJECTIVE

- Our afterschool remedial education program will assist 50 children in improving their reading scores by one grade level
-

METHODS

- ❑ DESCRIBES SPECIFIC ACTIVITIES OF THE PROGRAM
 - ❑ MUST MATCH EACH OBJECTIVE OF THE PROGRAM
 - ❑ BREAK THE ACTIVITIES DOWN INTO ITS COMPONENT PARTS
-

HOW

- What will occur from start to finish

WHEN

- Use a timetable to show all phases

WHY

- Defend your program
-

STAFFING & ADMINISTRATION

- Paid staff (both FT and PT)
 - Volunteers
 - Consultants
 - Number of staff for the program
 - Qualifications
 - Specific assignments
-

EVALUATION

- ❑ MOST GRANTMAKERS REQUIRE PROGRAM EVALUATION AS A CONDITION TO RECEIVING FINANCIAL SUPPORT
 - ❑ GRANTMAKER WILL USUALLY TELL YOU WHAT TYPE OF EVALUATION IS REQUIRED
-

SUSTAINABILITY

- ❑ GRANTMAKERS WANT TO SEE SELF-SUFFICIENT PROGRAMS AND ORGANIZATIONS

 - ❑ BE SPECIFIC ABOUT CURRENT & PROJECTED INCOME & EXPENDITURES
-

BUDGET

EXPENSE INFORMATION

- Personnel
- Non-personnel
- Overhead

INCOME INFORMATION

- Support
 - Revenue
-

BUDGET NARRATIVE

- ❑ NOT ALWAYS NEEDED
 - ❑ EXPLAINS EACH LINE IN THE BUDGET
 - ❑ AVOIDS MISUNDERSTANDING
-

ORGANIZATION INFORMATION

- ❑ DATE OF FOUNDING AND MISSION
 - ❑ ORGANIZATION'S STRUCTURE, PROGRAMS AND SPECIAL EXPERTISE
 - ❑ INFORMATION ABOUT BOARD & STAFF
-

CONCLUSION

□ FINAL APPEAL FOR YOUR PROGRAM

□ REITERATE

- What you will accomplish
 - Why it's important
 - Who will benefit
-

QUESTIONS ?



STEP 3

PACKAGING THE PROPOSAL

COVER PAGE

- ❑ CONVEY SPECIFIC INFORMATION
 - ❑ PROTECTS THE PROPOSAL
 - ❑ REFLECTS PROFESSIONALISM
 - ❑ DON'T FORGET
 - Direct telephone numbers or extensions
 - Fax number
 - E-mail address
-

TITLE

- MUST REFLECT WHAT THE PROGRAM IS ABOUT
 - NO CUTE NAMES
 - NO DUPLICATIONS WITH OTHER PROGRAMS
-

TABLE OF CONTENTS

- ❑ HELPS THE READER FIND KEY INFORMATION QUICKLY

 - ❑ MAKES THE PROPOSAL USER-FRIENDLY
-

ORDER OF PROPOSAL

COVER LETTER

PROPOSAL

APPENDIX & SUPPORTING
MATERIALS

COVER LETTER

- INDICATE SIZE OF REQUEST
 - WHY APPROACHING THE FUNDER
 - ANY PRIOR CONTACT
 - CONTENTS
 - CONCISELY EXPLAIN PROGRAM
 - OFFER TO SET UP A MEETING
-

APPENDIX & SUPPORTING MATERIALS

- BOARD MEMBERSHIP LIST
 - PROOF OF TAX-EXEMPT STATUS
 - FINANCIAL INFORMATION
 - RESUMES
-

REMEMBER ...

IN A CLOSE DECISION ...

SLOPPINESS DOES MATTER !

QUESTIONS ?



STEP 4

RESEARCHING FUNDERS

COMPILE

- DRAW UP A LIST OF ALL POTENTIAL DONORS
 - PRINT & ELECTRONIC SOURCES
 - CHECK LOCAL RESOURCES
 - WHO IS FUNDING OTHERS IN THE AREA?
-

FOR ALL GRANTMAKERS

- WHO FUNDS IN MY GEOGRAPHIC AREA?
 - WHO FUNDS IN MY AREA OF INTEREST?
 - WHO PROVIDES THE TYPE OF SUPPORT I NEED?
 - WHO HAS GIVEN AMOUNTS IN THE RANGE I NEED?
-

FOUNDATION PRINT RESOURCES

- ❑ ANNUAL REGISTER OF GRANT SUPPORT
 - ❑ FOUNDATION 1000
 - ❑ FOUNDATION DIRECTORY
 - ❑ GUIDE TO US FOUNDATIONS
-

FOUNDATION ELECTRONIC SOURCES

FC SEARCH

FOUNDATION DIRECTORY
ONLINE

■ <http://www.fconline.fdncenter.org>

IRS FORM 990-PF

■ <http://tfcny.fdncenter.org/990s/990search/esearch.php>

CORPORATE PRINT DIRECTORIES

- ❑ CORPORATE AFFILIATIONS
 - ❑ CORPORATE GIVING DIRECTORY
 - ❑ HOOVERS HANDBOOK OF
AMERICAN BUSINESS
 - ❑ HOOVERS HANDBOOK OF PRIVATE
BUSINESS
 - ❑ NATIONAL DIRECTORY OF
CORPORATE GIVING
-

QUESTIONS ?



STEP 5 :

CULTIVATING FUNDERS

BEFORE APPLYING

□ INTRODUCTORY CALL

- Show the grantmaker you've done your homework
- Be prepared to discuss the project
- Tell the grantmaker amount you need
- Clarify deadlines, spellings, attachments

□ LET THE GRANTMAKER DECIDE IF YOUR PROGRAM FITS THEM!

LETTER OF INTENT

- ❑ PRECEDES THE PROPOSAL
 - ❑ SUMMARIZES THE PROJECT
-

CULTIVATE POTENTIAL FUNDERS

- TELEPHONE CONTACT
 - WRITTEN COMMUNICATION
 - BOARD NETWORKING
 - APPOINTMENTS
-

WRITTEN COMMUNICATION

- QUARTERLY UPDATES
 - PROGRAM REPORTS
 - NEWSLETTERS
 - BROCHURES
 - AUDITS
-

QUESTIONS ?



STEP 6 :

RESPONDING

GRANTED



CONGRATS!

- SEND A THANK YOU LETTER
 - FOLLOW THE GRANTMAKERS REQUIREMENTS
-

REJECTION



-
- ❑ SEND A THANK YOU LETTER
 - ❑ CALL TO FIND OUT WHAT TO DO NEXT
 - ❑ DON'T TAKE IT PERSONALLY
 - ❑ BE PERSISTENT
-

QUESTIONS ?



HELPFUL INFORMATION

COMPUMENTOR'S TECHSOUP

- ❑ A resource on technology created expressly for nonprofits
 - ❑ Offers recommendations on
 - ❑ Donated / discounted software
 - ❑ Equipment
 - ❑ Technology topics
 - ❑ <http://www.techsoup.org>
-

□ Foundation Center RFP Bulletin :
Science/Technology

- http://fdncenter.org/pnd/rfp/cat_science.jhtml

□ Hardware Donation Programs

- <http://www.techsoup.org/howto/articles/hardware/page3122.cfm>
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