



LEONARDTOWN GRANTS  
LLC

## GRANT PROPOSAL WRITING

January 14, 2021

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Grants, LLC

# COURSE OVERVIEW



Organizational  
Readiness



Grant  
Utilization  
Practices



Researching &  
Building a  
Grant  
Development  
Pipeline



Proposal  
Development &  
Management



Budgets



Writing Best  
Practices



## ORGANIZATIONAL READINESS

- Basic Requirements
  - Tax filings
  - Financial Audit
  - Annual Budget
  - Board of Directors
  - Organization Mission & Vision
- Federal: [DUNS](#) and [SAM.gov](#)
- State: Charity Registration
  - MD: over 25k = [Register charity](#)
  - MD: under 25k = [Charity registration exemption](#)



## STRATEGIC PLANNING & LEVERAGING VOLUNTEERS

- Strategic Planning
  - Board & CEO Roles in Strategic Planning
  - Do we need an outside firm?
  - Getting an existing donor to support strategic planning.
- Leveraging Volunteers ([volunteer time is currently \\$27.20/hour](#))
  - Activating the Board
  - Events and Campaigns



## GRANT UTILIZATION PRACTICES

- Types and Purpose of Grants
  - Program support & research (common)
  - General operating support (rare)
    - Best for charitable gifts/donations
  - Capital (tricky)
    - Campaigns could be a combination of gifts and grants



- Deliverable Requirements (state, federal, and private foundations)
- Allowable and not allowable costs (salaries, equipment, overhead, travel, etc.)
- Legal grant agreements
- Capacity to Get Work Done
  - Personnel
  - Financial Management
  - Partnerships
  - Grant reporting and evaluating



- Program, operational, capital, etc.
  - Organization focus (health, environment, education, etc.)
  - Ranking priorities (what is most immediate)
  - Realistic expectations
  - Program/Project Budget estimates

## QUESTION AND ANSWER SESSION

## FIRST BREAK: TEN MINUTES

PLEASE FEEL FREE TO LEAVE ADDITIONAL QUESTIONS  
IN THE ZOOM CHAT



## RESEARCHING & BUILDING A GRANT DEVELOPMENT PIPELINE

- Unsolicited inquiries
- Open Requests for Applications (RFAs)
- Funding Interests & Funding Limitations (grant matching)
- Giving History
- Relationship Connections
- Geographic Interests
  - Regional versus national donors

## COSTCO WHOLESALE

Costco Wholesale's primary charitable efforts specifically focus on programs supporting children, education, and health and human services in the communities where we do business.

Our Charitable Contributions Committee is charged with overseeing our charitable giving and encouraging decentralization of charitable giving so that the greatest impact is where Costco's employees and members live and work. Only 501(c)(3) nonprofit organizations, which meet our giving guidelines and focus areas, are considered.

### Required Materials:

- Cover Letter
- W-9
- Organization's budget information (current year and past year)
- Program budget information (current year and past year if applicable)
- Measurable Results/Impact Report (for your most recent year of Costco support - if applicable)
- only required if your organization has received funding in the past

# COSTCO WHOLESALE DOES NOT FUND

- Individuals (crowdfunding, GoFundMe pages, etc.)
- Capital campaigns, building projects, or equipment
- Transportation and travel expenses
- Political organizations
- Religious organizations for religious purposes
- Salaries or staff training
- Government agencies
- Loans or investments
- Research studies
- Athletic teams, events, booster clubs, or sponsorships
- Animal related programs, including shelters
- Merchandise for fundraisers and
- Symposiums, conferences, conventions, professional association meetings
- Individual primary and secondary schools, PTO's and PTA's
- Merchandise promotions, partnerships or advertising
- General awareness campaigns/advocacy
- Development or production of books, films, videos, television programs, social media or websites
- Parties, celebrations, parades, festivals and raffles
- Deficit funding
- Awards, monuments and/or memorials

## DOMINION ENERGY CHARITABLE FOUNDATION

*Dominion Energy Charitable Foundation grants are limited to organizations defined as tax-exempt under Section 501(c)(3) of the IRS code. Foundation grants are funded by shareholder dollars. Additional grants occasionally may be made directly from the corporation to sponsor special events that benefit a non-profit organization. Grants are made in four focus areas.*

- **Human needs** grants that support increased food security, housing and shelter, and access to basic medical and health care.
- **Environmental stewardship** grants to protect natural resources and help non-profit organizations make efficient use of energy.
- **Education** grants to develop the capacity of the future workforce, especially in STEM and energy fields.
- **Community vitality** grants to foster an appreciation of diversity, revitalize neighborhoods and ensure a vibrant community life through support of cultural endeavors.

Because the Dominion Energy Charitable Foundation supports a wide range of charitable programs, most grants are in the \$1,000 to \$15,000 range.

Organizations designated as 501(c)(3) public charities by the IRS are eligible. Awards are made primarily in areas where Dominion Energy provides retail electricity or natural gas services or has significant facilities or business interests.

*Dominion Energy receives funding requests far in excess of our Foundation and corporate contribution budgets. This means regrettably we must often decline support for otherwise worthy proposals. Such a response does not reflect on the value of the organization or its services.*

# DOMINION ENERGY CHARITABLE DOES NOT FUND

- Tangible benefits, including utility payments to Dominion Energy or any of its subsidiaries or affiliates
- Individuals
- Religious programs of churches or other sectarian organizations
- Fraternal, political, advocacy or labor organizations
- Projects or organizations that are not located within geographic areas where Dominion Energy provides electricity or natural gas service, or has significant facilities or business interests
- Fund-raising events (dinners, lunches, etc.)
- Golf tournaments or other sporting events
- Organizations without 501(c)(3) tax-exempt status
- Organizations that limit membership and services based on race, religion, color, creed, sex, age or national origin
- Advertising for benefit or courtesy purposes
- Travel-related events, including student trips or tours
- Memorial campaigns

# THE MARYLAND HISTORICAL TRUST

*The Maryland Historical Trust is the state agency dedicated to preserving and interpreting the legacy of Maryland's past. Through research, conservation, and education, the Maryland Historical Trust assists the people of Maryland in understanding their historical and cultural heritage.*

The Historic Preservation Capital Grant Program promotes the acquisition, restoration, and rehabilitation of historic properties in Maryland. Eligible properties are limited to those which are listed in or eligible for the Maryland Register, either individually or as a contributing structure within a district.

The following entity types are eligible for this program. All applicants should be aware that the project must have a demonstrated public benefit in order to be competitive.

- Nonprofits
- Local governments
- Business entities
- Individuals

State and federal government entities are eligible to apply as nonprofits; however, projects involving state and federally owned properties cannot comply with the requirement to convey a perpetual preservation easement to MHT and therefore are not expected to rank highly enough for funding.

Grants are up to \$100,000 per project per year. All applicants except for nonprofit organizations are required to provide a dollar-for-dollar match.

# THE MARYLAND HISTORICAL TRUST FUNDING ELIGIBILITY

- The following capital project types are eligible for assistance. All projects must be capital projects on a property that is eligible for or listed on the Maryland Register. Projects must also have a strong public benefit in order to be competitive.
- Acquisition
- Rehabilitation or restoration
- Predevelopment costs such as studies, surveys, plans and specifications, and architectural, engineering, or other special services directly related to pre-construction work for a capital project (predevelopment costs are only eligible costs for nonprofit organizations and local government applicants)
- Work, or a discrete phase of work, that is already underway or completed is not eligible for grant funding.



## RESEARCH RESOURCES

- Resources
  - Candid.org: Foundation Center and GuideStar
  - Foundation Center and Grants to Individuals databases access is available inside select Charles County, St. Mary's County, and Calvert County public libraries with a library card.
  - Charity Navigator
  - Foundation Search

- Closely reading RFA/proposal guidelines
- Identifying important dates
  - Hard deadlines vs. rolling deadlines
- Webinars and useful resources
- Program Officer
- Identifying partners
- Prioritizing proposal requirements  
(things that need to be signed or approved)



PROPOSAL  
DEVELOPMENT  
& PLANNING

## BREAKOUT GAME: TIME'S UP!

We will go over four hypothetical scenarios of different funding opportunities. Review each scenario with your breakout room, then come to a consensus and rank each proposal process from least to most amount of development time from the start to final submission.

**What do you think is the approximate timeline of each proposal? Why?**

**Which requires the least amount of effort, and which requires the most?**

## BREAKOUT GAME: TIME'S UP!

### **Scenario #1**

One of your organization's members has referred you to a foundation that supports operating expenses. They require a two-page letter of request (LOR) for grants, which should be typed, Times New Roman 12-point font, and signed by the Board of Directors Chair and Chief Executive Officer.

## BREAKOUT GAME: TIME'S UP!

### **Scenario #2**

An organization is applying to the National Sciences Foundation for a grant to advance STEM class availability for middle-schoolers. They have reached out to your organization to partner with them on their project. Required partners are: 1. An academic institution, 2. A local school system, and 3. Nonprofit and for-profit industry leaders. A partner must provide a signed letter of commitment detailing involvement, resumes of key personnel, and budgetary requirements as a subcontractor/consultant on the project.

## BREAKOUT GAME: TIME'S UP!

### **Scenario #3**

Your organization would like to pilot a new research project, and you have discovered a viable funder with a two-stage application process for their research grant program. The first stage is a letter of inquiry with a due date in two weeks. The LOI requires information on the background & justification, key personnel, specific aims, budget totals, and research methodology as well as a financial audit and IRS letter. Your organization does not need to supply a line-item budget or institutional review board approval for this stage.

## BREAKOUT GAME: TIME'S UP!

### **Scenario #4**

Your organization has submitted a letter of inquiry (LOI) to a foundation, and the LOI was accepted for a full proposal. The full application requires a lengthy, detailed application, signed by the Board President and Chief Executive Officer, a line-item program budget, list of board of directors, IRS letter, most recent financial audit, and current operating budget. The page limit for the proposal is ten pages. Prior to submission, the foundation would also like to schedule a site visit.

## BREAKOUT GAME: TIME'S UP!

Below are four hypothetical scenarios of different funding opportunities. Review each scenario with your breakout room, then come to a consensus and rank each proposal process from least to most amount of development time from the start to final submission.

**What do you think is the approximate timeline of each proposal? Why?**

**Which requires the least amount of effort, and which requires the most?**

1. One of your organization's members has referred you to a foundation that supports operating expenses. They require a two-page letter of request (LOR) for grants, which should be typed, Times New Roman 12-point font, and signed by the Board of Directors Chair and Chief Executive Officer.
2. An organization is applying to the National Sciences Foundation for a grant to advance STEM class availability for middle-schoolers. They have reached out to your organization to partner with them on their project. Required partners are: 1. An academic institution, 2. A local school system, and 3. Nonprofit and for-profit industry leaders. A partner must provide a signed letter of commitment detailing involvement, resumes of key personnel, and budgetary requirements as a subcontractor/consultant on the project.
3. Your organization would like to pilot a new research project, and you have discovered a viable funder with a two-stage application process for their research grant program. The first stage is a letter of inquiry with a due date in two weeks. The LOI requires information on the background & justification, key personnel, specific aims, budget totals, and research methodology as well as a financial audit and IRS letter. Your organization does not need to supply a line-item budget or institutional review board approval for this stage.
4. Your organization has submitted a letter of inquiry (LOI) to a foundation, and the LOI was accepted for a full proposal. The full application requires a lengthy, detailed application, signed by the Board President and Chief Executive Officer, a line-item program budget, list of board of directors, IRS letter, most recent financial audit, and current operating budget. The page limit for the proposal is ten pages. Prior to submission, the foundation would also like to schedule a site visit.

## QUESTION AND ANSWER SESSION

## **SECOND BREAK: TEN MINUTES**

**PLEASE FEEL FREE TO LEAVE ADDITIONAL QUESTIONS  
IN THE ZOOM CHAT**

- Identify and align with allowable costs
- Salary caps
- Are there salary/FTE (Full time employment) minimums?
- Real versus estimated costs
- ID your CFO/financial manager
- What if the grant isn't meeting its goals?
- Underspent Budget
- How to handle a staffing change mid-way through budget

## BUDGETS

# BAD BUDGETS AND GOOD BUDGETS

No context  
for existing  
salaries, %  
effort

Lack of  
detail, what  
are  
“supplies”?

Round  
numbers  
signal rough  
estimations

## Bad Budget

Staff A	\$ 15,000.00
Staff B	\$ 30,000.00
Contractor	\$ 15,000.00
Supplies	\$ 1,000.00
Rent and Utilities	\$ 15,000.00
Travel	\$ 500.00
Indirect (10%)	\$ 7,650.00
<b>Total</b>	<b>\$ 84,150.00</b>

Details on rates and amounts  
are included.  
For example: Travel is based on  
real miles traveled and IRS  
mileage rate numbers

## Good Budget

Salaries indicate % of work on project and fringe

Salaries	Salary	FTE	Fringe (20%)	Total
Staff A	\$ 45,000.00	0.25	\$ 2,250.00	\$ 13,500.00
Staff B	\$ 35,525.00	0.8	\$ 5,684.00	\$ 34,104.00
Contracts	Rate	Hours		
Clerical Support	\$ 15.00	520		\$ 7,800.00
Supplies	Cost per unit	# units		
Books	\$ 60.00	60		\$ 3,600.00
Rent and Utilities	Rate	Months		
Rent	\$ 1,453.00	12		\$ 17,436.00
Travel				
Car travel to community school (15 miles round trip for 52 weeks)	\$ 0.58	780		\$ 448.50
Indirect (10%)				\$ 7,688.85
<b>Total</b>				<b>\$ 84,577.35</b>

- Who, what, where, when, why, and how
- Tell a story without being editorial
- Identify and connect to the need of the grant
  - Addressing a specific RFA's funding priorities?
  - How your organization meets those needs
- Addressing guidelines/prompts
- Making proposal cohesive
- [AP Stylebook](#) (or the preferred style manual of your industry)
- No stylebook? Just be consistent!



## WRITING BEST PRACTICES

## SMART OBJECTIVES

- A SMART Objective is:
  - **S**pecific
  - **M**easurable
  - **A**chievable
  - **R**ealistic
  - **T**ime-bound
- State your objectives in quantifiable terms
- State your objectives as outcomes, not process
- Objectives should specify the result of an activity
- Objectives should identify the target audience or community that you plan to serve
- Objectives need to be realistic and something you can accomplish within the grant period

# BREAKOUT GAME: IS IT SMART?

You are on a panel of grant reviewers who are evaluating several applicant's objectives for their proposals. Please answer the following questions for to make your evaluation.

Are the objectives SMART? Why or why not?

If the objectives are SMART, what measurable outcomes could be expected?

Objective 1: Two new food pantries will be set up within first month of grant award.

Objective 2: By year two of the project, staff will have trained 75% of health education teachers in the school district on the selected scientifically-based health education curriculum.

Objective 3: Tutor will work with teacher to meet individual literacy needs.

Objective 4: Great Mills Elementary School 1st grade students will increase literacy by participating in summer reading competition and improving literacy test scores by 10%.

Objective 5: Entrance and exit ramps will be assessed, and repairs will be made within first six months of grant award.

## QUESTION AND ANSWER SESSION

## ADDITIONAL PROFESSIONAL DEVELOPMENT RESOURCES

- Certifying bodies:
  - Certified Fund Raising Executive (CFRE) International [cfre.org](http://cfre.org)
  - Grant Professionals' Association (GPA) [www.grantprofessionals.org](http://www.grantprofessionals.org)
- Additional free resources:
  - Charity HowTo [www.charityhowto.com](http://www.charityhowto.com)
  - Nonprofit Institute at the College of Southern Maryland  
<https://www.csmd.edu/community/institutes/nonprofit-institute/>

# **THANK YOU!**

**GOOD LUCK!**

## **GRANTWRITER**



**What my friends think I do**



**What my mom thinks I do**



**What program staff think I do**



**What my boss thinks I do**



**What I think I do**



**What I really do**