



## Getting Grant Ready Full Course

### Table of Contents

- Module 1: Introduction and Course Overview
- Module 2: Document Inventory Checklist
- Module 3: Who's On Your Team?
- Module 4: Developing Your Organization's Missions and Vision
- Module 5: Should We Apply?
- Module 6: Grant Writing Basics
- Module 7: Building a Budget



## Module 1: Introduction and Course Overview

### Introduction Video

### Purpose and Objectives

#### **Purpose**

This module will provide you with a checklist with all the documents required to apply for grants.

After this module, you will have the tools to track the documents that your organization has prepared, as well as those still needed to apply for grants.

If you don't have everything just yet, don't worry! By the time you complete this course, you should be well on your way.



## Module 2: Document Inventory Checklist

[Document Inventory Check List Video](#)



# Document Inventory Checklist

## MUST HAVES

501c3 Letter of Determination

W-9

Proof of Compliance

History, Vision & Mission

List of Board of Directors w/ Affiliations & Contact Info

Organizational Chart

Budget for Current Fiscal Year (FY)

Program Logic Models (or Plans)

Biographies/Resumes of Staff

Program Budgets for Current FY

Tax Returns of Last 2 Years

Audited Financial Statements in last Two Years

## NICE-TO-HAVES

Electronic Letterhead

Anti-Discrimination Policy

Annual Reports or Fact Sheet



## Module 3: Who's On Your Team?

### Purpose and Objectives

#### Who's On Your Team Video

##### **Purpose**

This module will provide information and resources on how to identify and assemble a team of individuals to work with you on your grants.

By the end of this module, you will have the tools to:

- Normalize the process of creating a team to work on grants, so grant writing isn't seen as the responsibility of one or two individuals;
- Identify your organization's grant writing team; and
- Reach out to potential members of your grant writing team and ask them to join.

##### **Reminders and Expectations**

Like writing a grant, this module is best done with a team. For organization leaders, it can often feel as though you have to carry your work alone.

This module is meant to assist in identifying the strengths of various individuals within your team or community who can support your organization's success, and to build the trust necessary to delegate tasks and grant deliverables.

If you're working with a group, follow along the videos and do the activities together.

If you're working on your own, there will be opportunities throughout to connect with others through the community forum.



## Building a Team: Roles and Responsibilities

### [Defining Grant Team Roles Video](#)

Grassroots leaders wear so many hats that their capacity can be stretched too thin and grant opportunities are missed. Additionally, sometimes one or two individuals are given the entire responsibility of grant writing, which is overwhelming and ineffective. This module will help you identify staff and supporters of your organization who can help with grant writing and become your grant writing team.

Participants are not required to have direct grant writing experience, but can carry any skill and/or interest relevant to grant writing including research, writing, budgeting, attention to detail, etc. EJUSA asks that identified teams participate in the Getting Grant Ready Training Series.

**Your grant team will have individuals filling different roles. Below are a few, as well as the competencies required of each.**

*A note on "significant time"*

This module references "significant time" when discussing different individual roles and capacities. But what constitutes significant time? Unfortunately, we can't say exactly — it will vary based on your team and the grant. But some things you might consider: how long do you have to complete the application? A lot of work over many months is different than a lot of work over 2 weeks! How big is your team? How much of the grant content can be recycled or updated from other grant applications? Is there any independent research they'll need to do? Use your best judgment to provide context for your team about how much time they are likely to devote to the project over a given time frame.



## **Grant Driver**

One individual responsible for ensuring deadlines are met, that members of the grant team gather to work on various parts, and that the grant is submitted on time. This should only be one person and should be either the ED or organizational head, or a staff or volunteer empowered by the ED or organizational head to drive this project and make the final submission.

### Competencies of this role include:

- Is, or has sufficient access to, organizational decision-maker(s)\*
- Detail oriented
- Has authority to submit final grant
- Ability to give significant time to the grant process
- [Note] This person must be empowered to make decisions or has direct access to leadership who makes final decisions. If your Grant Driver is not the organizational decision-maker you must ensure the decision-makers is on board with the grant plan and has time to participate in the grant process as a consultant to the Grant Driver.

## **Strategists**

Two to three people who will create an overarching plan of how the organization's programming fits with the grant application. Individuals who could serve in this role are the ED or organizational head, board member, programs staff, or a leader in the community with experience in the programmatic area.

### Competencies of this role include:

- Familiar with the organization's missions and current goals.
- Familiar with the details of the proposed grant program
- Ability to give significant time to the grant process



## **Writers**

Two to three people who will draft the grant narrative and ensure all grant questions are answered. Individuals who could serve in this role: ED or organizational head, board member, programs staff, experienced writer who also has access to someone who can give the needed organizational information.

### Competencies of this role:

- Effective communicators
- Open to collaborating
- Able to carefully follow grant prompts
- Familiar with the organization
- Ability to give significant time to the grant writing process

## **Number Crunchers**

One to two people who will develop the grant budget(s). Individuals who could serve in this role: ED or organizational head, board treasurer, volunteer with accounting or budgeting experience.

### Competencies of this role:

- Familiar with / has access to the organization's financial information
- Able to understand and draft budgets
- Can give some time to the grant writing process

## **Editors**

One to two people who will carefully read through drafts of the grant to ensure you have the best final product possible. Individuals who could serve in this role: staff, board member, volunteer.

### Competencies of this role:

- Detail oriented
- Able to carefully compare grant prompts to draft to ensure compliance



- Not an initial writer, so can look with “fresh eyes”
- Is able to give some time to the grant writing process

### **Evaluators (Optional)**

One to two people who will develop an evaluation plan for the organization’s programming including what data will be collected, how the data will be collected and how the data will be reported to the funder.

#### Competencies of this role include:

- Familiar with the goals and details of the proposed grant program.
- Familiar with the audience that the proposed grant program is intended for.
- Detail oriented.
- Understands what information needs to be collected and is familiar with collecting that information.
- Is able to give some time to the grant writing process.

### **Consultants (Optional)**

An optional role, consultants are someone who can lend expertise or give feedback due to their specialized knowledge about some piece of the grant. This could be any expert who doesn’t have much time to give to the grant process.

#### Competencies of this role include:

- Specialized knowledge about some piece of the grant
- May not have much time to give to the grant process, but will give expertise for one piece
- Ideally your grant writing team will be 3-6 people, which means some individuals will fill more than 1 of the roles listed above. It might be that you are able to assemble a team of people who will write most of your grants and serve as a standing “grant writing team”. This is ideal. But it’s also ok (and likely!) that you’ll need to assemble an ad hoc grant writing team for a project, or your team members will evolve over time.



## **Activity: Brainstorming Your Network**

Before thinking about who might be available to help with the grant, or what roles they might fill, let's start with an activity to list all the people who exist in your network. With your team, answer these questions to make one long list of individuals. Do not exclude anyone because you think they wouldn't be able to help on your grant team, at this point we want to be as inclusive as possible.

- List all your staff members
- List all your board members
- List everyone who is an active volunteer (could define as anyone who has given more than 2 hours of time to your organization's work)
- List people in your community who understand and are passionate about your organization's work
- List people in your community who know something about the type of work you might seek grant funding for
- List people who are great writers and probably care about your organization's mission
- List people who are savvy with numbers and probably care about your organization's mission
- List people with great attention to detail who probably care about your organization's mission
- Research and list organizations that provide grant application assistance.

That's likely a pretty long list of people. Obviously, you won't ask all of them to be on your grant writing team, but hopefully this activity got your juices flowing about the many people you know who could potentially be an asset to your grant writing process.



## Activity: Choosing Your Team

### [Choosing Your Team Video](#)

Fill out the worksheet below by reading the first row's role and associated competencies in columns A & B. Based on those competencies, list in Column C potential team members who have those competencies. Continue this for each row.

Note, it's okay to have one person participating in several roles/rows. In fact it's likely that some of your most engaged helpers will fill multiple roles/rows. After you've brainstormed all your potential team members (Column C) reach out to your top choices to ask them to join your grant writing team. See our support materials for advice and a sample email for that outreach. Write the names of everyone who's agreed to help with your grant process in Column D in the appropriate row(s). Congratulations, this is your grant writing team!

### **Below are a few tips and tricks for inviting someone to join your grant writing team:**

- Let the person know you are assembling a team of people to help (with a current project or to be on standby for the next opportunity) with grants for your organization.
- Let them know about the full team you're assembling (share who other committed team members are) and the role(s) you'd like them to help with.
- Be explicit about why you want the person to join. Some people can be intimidated by the idea of grant writing, so let them know exactly what skills they bring to the table. Example: "We could really use your attention to detail and deep knowledge of how our organization works in the community"
- Be clear about what your expectations of their time are - is this for a particular grant project that has known deadlines? Let them know about how much time you'll need from them and what deadlines are. If it's not for a particular grant, give them a ballpark idea of how much time they might be asked to give in the future.



- Let them know how you will be able to support them. Example: “You’ll be partnering with our board Treasurer, and we are able to give you access to our QuickBooks to help you formulate our budget”
- Let them know that this Getting Grant Ready Training Series exists as a resource for their grant writing team to learn from.

If there are still gaps for roles on your team once you complete the activity, it’s never too late to start building relationships with individuals who might someday join your grant writing team. Go back to the list of people you brainstormed who might be on your team and think about what the barrier to them is joining your grant team, and how you can start to overcome that barrier.

Some examples:

- Do they not know enough about or not prioritize your organization’s work? → Ensure they are given the latest information about how impactful your work is.
- Do they not have available time to commit? → Perhaps they can help now with a smaller project. Sometimes starting a project and relationship with an organization encourages them to make it a greater priority to do more with them.



### Choosing Your Team Worksheet

<b>Column A.</b>  <b>Roles:</b>	<b>Column B.</b>  <b>Competencies for this role:</b>	<b>Column C.</b>  <b>Who has these competencies?</b> (brainstorm any potential candidates)	<b>Column D.</b>  From column C, who has agreed to be on your team? <b>These are Team members!</b>
Grant Driver (This should be one person, with whom “the buck stops”)	<ul style="list-style-type: none"> <li>• Detail oriented</li> <li>• Has ability to keep other members of the team on task</li> <li>• Has authority to submit final grant</li> <li>• Is able to give significant time to the grant process</li> </ul>	<ul style="list-style-type: none"> <li>•</li> </ul>	<ul style="list-style-type: none"> <li>•</li> </ul>
Strategists (2-3 people could fill this role)	<ul style="list-style-type: none"> <li>• Is familiar with the long term plans of the organization</li> <li>• Is familiar with the details of the proposed grant program</li> <li>• Is able to give significant time to the grant process</li> </ul>	<ul style="list-style-type: none"> <li>•</li> </ul>	<ul style="list-style-type: none"> <li>•</li> </ul>
Writers	<ul style="list-style-type: none"> <li>• Effective communicators</li> </ul>	<ul style="list-style-type: none"> <li>•</li> </ul>	<ul style="list-style-type: none"> <li>•</li> </ul>

<p>(2-3 people could fill this role)</p>	<ul style="list-style-type: none"> <li>• Open to collaborating</li> <li>• Able to carefully follow grant prompts</li> <li>• Familiar with the organization</li> <li>• Is able to give significant time to the grant writing process</li> </ul>		
<p>Number Crunchers (1-2 people could fill this role)</p>	<ul style="list-style-type: none"> <li>• Familiar with / has access to the organization's financial information</li> <li>• Able to understand and draft budgets</li> <li>• Is able to give some time to the grant writing process</li> </ul>	<ul style="list-style-type: none"> <li>•</li> </ul>	<ul style="list-style-type: none"> <li>•</li> </ul>
<p>Editors (1-2 people could fill this role)</p>	<ul style="list-style-type: none"> <li>• Detail oriented</li> <li>• Able to carefully compare grant prompts to draft to ensure compliance</li> <li>• Not an initial writer, so can look with "fresh eyes"</li> </ul>	<ul style="list-style-type: none"> <li>•</li> </ul>	<ul style="list-style-type: none"> <li>•</li> </ul>

<p>Evaluator          (Optional for          some grants)</p>	<ul style="list-style-type: none"> <li>• Familiar with the goals and details of the proposed grant program.</li> <li>• Familiar with the audience that the proposed grant program is intended for.</li> <li>• Detail oriented.</li> <li>• Understands what information needs to be collected and is familiar with collecting that information.</li> <li>• Is able to give some time to the grant writing process</li> </ul>	<ul style="list-style-type: none"> <li>•</li> </ul>	
<p>Consultants /          Honorary          team          members          (optional)</p>	<ul style="list-style-type: none"> <li>• Specialized knowledge about some piece of the grant</li> <li>• Doesn't have much time to give to grant process, but will give expertise for one piece</li> </ul>	<ul style="list-style-type: none"> <li>•</li> </ul>	<ul style="list-style-type: none"> <li>•</li> </ul>



If you'd like, you can transfer the names of people & their roles from the above table to the below table.

<b>Name of team members</b>	<b>Role(s) they will fill</b>
1.	
2.	
3.	
4.	
5.	
6.	



## **Deep Dive: Partnering with Other Organizations**

It could be that the best partner on a particular grant is another organization. As you explore grant opportunities, bear in mind that it is possible for organizations to collectively apply for grants or it could be possible for another organization to be the lead grant recipient with your organization overseeing a part of the project and receiving some of the funds. (See Getting Grant Ready modules How to Build Partner Agreements & How to Talk about Partnerships)

Review the organizational partnership letter below, and use it to reach out to prospective partners.



## Partner Letter Template

**Copy & paste this letter template to invite others to join your grant writing team.**

Dear <Name>,

As you know <Organization name> is busy in our community <explain impact of your work>. We receive vital support from grants, and there exists (an ongoing need / a current opportunity) for help producing grant applications.

I am writing to ask you to serve on our grant writing team as <name and explain the role(s) you want them to play>. You would be working with <explain others who would be on the team, if you don't know the specific people, explain how they'll be a part of a team with everyone completing various roles> We think you would be an incredibly valuable member of this team because <explain why you are interested in their help i.e. their writing skills, attention to detail, ability to create a budget. Don't be afraid of a little flattery>

We think this will require <time commitment> and we plan to meet <explain next steps or what you know about the process>. It's OK if you don't have any previous grant writing experience. We believe our team together has all the skills we need to be successful, and our partner Equal Justice USA has a Getting Grant Ready Training Series that will help ensure we are compliant and effective.

I hope you'll consider joining our team. Of course I'd be happy to answer any questions you may have or talk with you about this more.

Warmly,  
<Your Name>



## Module 4: Developing Your Organization's Mission and Vision

### **Purpose and Objectives**

#### [Mission and Vision Intro Video](#)

#### **Purpose**

This module will provide you with a concise way to share your organization's values, purpose, and overall direction with potential funders, and develop fundamental language for all audiences about why your organization exists.

#### **By the end of this module, you'll be able to:**

- Better understand the benefits of a mission and vision statement
- Develop and refine a mission statement and a vision statement
- Strengthen your ability to pitch your organization to a funder

#### **Mission & Vision Main Points**

Before we get started, let's go over a few main points about your mission and vision statements.

#### **What is a mission statement?**

Your mission statement defines what needs or issues your organization addresses. It's also an opportunity to explain why your organization and strategy are vital for addressing the issue. Developing a mission statement offers an opportunity to identify what connects your personal story, the organization, and the community you are serving.



## What is a vision statement?

Your vision statement explains the overall purpose and goal of your organization. It is a brief, bold statement that highlights your organization's impact. It serves as a tagline for your organization's work, and tells the story of how your organization fits into the future. Because of this, it is most powerful when it's clear and inspiring.

## Why are mission and vision statements important?

Mission and vision statements are the first impression of your organization. They allow stakeholders — including funders — to understand the foundation of your organization and why it's necessary for the community. Refining your mission and vision is an opportunity to envision how your organizational goals will be accomplished if you have all the resources you need. Beyond applying for funding, mission and vision can also serve as a grounding tool for you, your team, and supporters.

### Here are some other ways that your mission and vision can be helpful:

- They provide you with language to concisely describe your organization.
- They help to ensure that your organization is staying mission focused and grounded in your core values.
- They help you to stay clear about the issue(s) your organization seeks to address, your target population, and how your services are provided.
- They inspire, motivate, and organize others to move your vision forward.

## What is a Mission Statement?

### [Creating a Mission Statement](#)

A mission statement is a concise explanation of the reason for your organization's existence. A strong mission statement expresses values by connecting them to action. It is operational - it says what you *do*. **A mission has to be operational - it says what is the organization trying to do overall, so that everyone involved can know what their contribution to that goal is.**



#### EXAMPLE:

- A hospital thinks of its mission as health care. But that's not actually true - a hospital doesn't take care of health, it takes care of illness. A hospital comes in when health breaks down. Saying "our mission is health care" also doesn't say anything about the actions hospital staff take and behaviors staff do.

Thinking about what happens in an emergency room, a better mission statement for a hospital emerges: to give assurance to the afflicted. That gives clarity that everyone who works there knows their job is to see people as quickly as possible, send those who need intensive care straight there, run tests for others, and send many people home with assurance.

**Your job is to convert your mission - your values embodied in a goal far off on the horizon - into specifics. Your job is also to make it simple and clear - what are the few things that if you accomplish them, they'll do the most for the cause?**

Every mission statement should reflect opportunities, competence, and commitment.

- What are the opportunities and needs you see?
- What do you do well, what are your strengths, and where can you, with your limited resources, really make a difference?
- What do you really believe in?

Some examples of great mission statements ([here](#), [here](#), and [here](#) or we can look at orgs in the field and pick a few)

## **Developing Your Mission Statement**

### [Developing Your Mission Statement Video](#)

Imagine there's an organization that provides after school tutoring programs for young people. They've been operating for over a year and have an existing



mission statement. Initially, they founded the organization to help increase literacy rates in their community. Over time, the organization added enrichment activities, parent support groups, and a weekend lunch program. They also built relationships with local politicians to lobby for more school funding.

Their original mission statement was “to provide tutoring in order to increase literacy rates in the community”, do you think it captures everything the organization does?

### ***What’s missing from their mission statement?***

Here is an example of a mission statement that captures the organization's goals, values, and approach to their work:

- *“Our organization is dedicated to healing the community by providing education opportunities to enrich the lives of young people and building a culture of accountability for the decision-makers who can have an impact on their lives.”*

**When applying for funding, your mission statement is most effective when it captures how you do your work and how it connects to the needs of your target population.**

Write your mission statement from a place of hope and imagine you have all the resources you need to actualize your vision.

### **What is a Vision Statement?**

#### [Creating A Vision Statement Video](#)

A vision statement describes what you want to achieve in the long run. It describes the world as it would be if you achieved your mission. It is your picture of what it looks like and what would be possible if you reach your long-term goals. It is a powerful outcome, in powerful words that evoke emotion.



## Developing Your Vision Statement

Developing your vision statement is all about imagining the world that you want to create if your organization achieves its mission. Look at the following sample mission statement:

*Our organization is dedicated to healing the community by providing education opportunities to enrich the lives of young people and building a culture of accountability for the decision-makers who can have an impact on their lives.*

**When creating a vision statement, it's often helpful to ask the following questions:**

- **What would life look like if we actualized our mission?**  
For the organization above, an actualized mission might create a world where communities come together to enrich the lives of young people.
- **What would life look like for your target population?**  
For this organization, this might mean that all young people in their community would live safe and fulfilling lives.

If you're working on the vision statement with a group, take turns sharing each person's vision for the organization. Try to limit the vision to one sentence. Once you've heard and recorded everyone's thoughts, find similarities. Work together to create a vision statement that aligns with the collective.

The following activities will help you and your team dig deeper into your shared values, identifies, and reasons for doing your work, and help you to craft a strong mission and vision statement.



## **Deep Dive: Five Questions to Determine Values**

In her book [Unapologetic: A Black, Queer, and Feminist Mandate for Radical Movements](#), activist Charlene Carruthers asked five questions every organizer should ask themselves or their group. Use this worksheet to reflect on these five questions and either journal or discuss in pairs.

### **Who am I?**

Think beyond your title and investigate your interests, motivations, and what you are capable of doing. Name your talents and how you contribute to the overall mission.

### **Who are my people?**

This is a question from organizer Ella Baker. Explore who motivates you to do the work, inspires you, and your allies.

### **What do we want?**

Be specific and clear about the issue the organization is addressing.

### **What are we building?**

Distinguish what you are doing versus what you aren't. Identify how long your mission may take. Consider how your organization may look different in 5, 10, 20 years.

### **Are we ready to win?**

This question may be difficult to answer, especially if you don't have the staffing power or resources to fulfill your mission. Imagine if you did win, what would it take for your work to sustain?



## **Activity: Using Your Values to Build a Mission & Vision Statement**

This activity will help you and your organization to identify your values and use those values to create your mission statement.

You can do this individually or with your team, using the worksheet in the next section. This process may bring up feelings or discomfort. Listen to each other compassionately and remember that everyone has their own understanding of the organization. By working together, you can create a collaborative mission statement that guides your programs and ensures your team stays mission focused.

### **First, list ten values that are important to you or your group.**

Examples of values can include: compassion, healing, accountability, etc.

- **Once you have ten values listed, eliminate four.**

Be sure to include the opinions of everyone in your group. Remember, just because you are taking away values for this activity, it does not mean they are no longer important for your organization. You can still include them in your work.

### **Now that you have six values, narrow those down to three. These three values will make up the basis of your mission statement.**

- Here's an example:
  - Our organization is dedicated to **healing** the community by providing **education** opportunities to enrich the lives of young people and building a culture of **accountability** for the decision-makers who can have an impact on their lives.

Now, look at your list of values from the previous exercise. Brainstorm a list of verbs that embody those values and speak to what your organization does. Using this list and the worksheet in the following section, you'll create the building blocks of your vision statement.



On the worksheet, basic building blocks can be described as actions that you take as an organization and target beneficiaries of your work. Other building blocks can include your services, the problem(s) you work to solve, and partners that you work with.

**If you're working in a group, have each person pick one of the verbs you've just listed and 1-2 of the other building blocks, and write a mission statement in 15 words or less.**

**Once you each have your mission statements, break into groups of 2-3.** Share the statements that each individual came up with in each group. Talk about what you like about each others' mission statements, and **then come up with one 15 word statement as a group.**

Come back together and share the new, revised mission statements. **See if you can combine and come up with one that is still 15 words or less.**

**If you're working individually, get feedback from your staff and collaborators. Some helpful questions may be:**

- Does this speak to who we are?
- Does this speak to what we do?
- Is it clear and concise? Does it move you to action?
- Does this make it clear what you can do in your role to advance the mission?
- Revise as you get feedback
  - [Developing Your Mission Statement Worksheet](#)
  - [Building a Vision Statement Building Blocks Worksheet](#)



## Developing Your Mission Statement Worksheet

As a group, or individually, define your core values to strengthen your organization's mission statement. By working together, you can create a collaborative mission statement that guides your programs and ensures your team stays mission focused.

**Step 1: List 10 values that are important to you and your group.**

Think beyond your title and investigate your interests, motivations, and what you are capable of doing. Name your talents and how you contribute to the overall mission.

---

---

---

---

---

---

---

---

---

---

**Step 2: Eliminate 4 and list the remaining values below.**

Remember, just because you are taking away values for this activity, it does not mean they are no longer important for your organization.

---

---

---

---

---

---

---

**Step 3: Narrow down your list to 3 values.**

These three values will make up the basis of your mission statement.

---

---

---

**Example:**

Our organization is dedicated to **healing** the community by providing **education** opportunities to enrich the lives of young people and building a culture of **accountability** for the decision-makers who can have an impact on their lives.

## Vision Statement Building Blocks

Using the building blocks below, create a vision statement that embodies your work and values. The other building blocks (services, problems, causes, and partners) can be used to make your vision statement more focused.

**VALUE**

**VALUE**

**VALUE**

List the 3 values from the previous activity here

**ACTION**

**ACTION**

What is the primary function of your organization? List the verbs here.  
Example: support, educate, assist, organize, etc.

**TARGET BENEFICIARIES**

Who does your organization serve?  
Example: youth, low income communities, etc.

**SERVICES**

**PROBLEMS**

**CAUSES**

**PARTNERS**

ex: youth program,  
advocacy, etc.

ex: increase in  
community violence

ex: systemic racism,  
limited resources

ex: schools, other  
orgs in ecosystem



## **Deep Dive: Pitching Your Mission and Vision**

### [Practicing Your Pitch Video](#)

Now that you've created your mission and vision, it's time to practice your pitch. A great pitch helps others to identify the work that you do, and encourages them to get involved.

To practice your pitch, state your organization's mission and vision out loud to at least three people. Have them give you feedback by answering the following questions:

- Is it clear and concise?
- What do they think about it?
- For team members: Does it move them to action?
- For people outside of your organization: Does it compel you to want to get involved?



## Module 5: Should We Apply?

### Purpose and Objectives

[Should We Apply? Intro Video](#)

#### **Purpose**

This module will help you to understand which grants are the best fit for your organization to pursue: those that will meet and enhance your mission in a way that aligns with your organization's current capacity.

#### **After this module, you will have the tools needed to:**

- Follow and adapt a process to decide if a particular grant is a good fit for your organization to apply to at a particular time.
- Identify when a grant fits within your organization's mission and strategic plan.

#### **Reminders and Expectations:**

This module is best done with others, ideally people familiar with your organization's priorities and/or the grant writing process.

If you're working with a group, please stop and reflect together about each set of questions. Some of the questions are subjective, so it's likely you won't always agree on all the details, but the goal is to come to an agreed upon understanding on whether to move forward with an application.

If you're working on your own, there will be opportunities throughout to connect with others through the community forum

This module will walk through the various things to take in mind when looking at funding opportunities. It may be helpful to follow along using a grant



opportunity that you and your team are thinking of applying for, so that you can reference it as you move through the module.

,

## **Racial Equity and Funding Opportunities**

### [Racial Equity and Funding Opportunities Video](#)

Historically, work in Black and brown communities hasn't received the same recognition, funding, or access to funding opportunities as work done by predominantly white organizations and institutions. This can lead organizations to expect that they won't receive funding, and to even pass up grant opportunities. While you don't want to waste your time on a grant opportunity, you're not a good fit for, we also want to encourage you to not rule yourself out too quickly if your organization isn't an exact match. Some requirements may be rigid (see our section below about eligibility), but other information (like types of programs a grant maker has historically funded) may show you whether your work is indeed a good fit. Trust your gut. If you think your work fits, don't eliminate yourself from the running before the grantor has a chance to learn about your work.

## **Evaluating Funding Opportunities**

*Does this grant serve your existing work or goals?*

You should not create programming to satisfy a grant. Put another way, grants should not drive the work your organization is doing. Rather, you should find grants that are able to fund the programs you are already doing or planning to do. Even if you have the time and capacity to write a grant, carefully consider this set of questions before committing to apply:

- Are the funds for general use or do you already have a program that this grant can help you fund?
- If you are expanding your work, what impact will that have on your other programming?



- While we recommend against creating a new program for a grant, if you decide to create a new program, will that program fit within your organization's mission and current priorities?
- If you were to receive this grant, does your organization have the capacity (staff, time, systems and supports) needed to manage it?

If it feels like this grant could fund your organization's current work or strategic expansions, hoorah! Keep considering this grant with the section below. If this grant is going to cause you to completely revamp your work or veer from your strategic plan, we'd advise against this one.

### **How likely are you to receive funding?**

Every grant is a gamble, so sometimes you just must roll the dice and try. It's also true that some funders have historically done a poor job of funding smaller organizations, and we want to change that to ensure those doing meaningful work in communities are supported and sustained. So just because a funder hasn't historically funded organizations like yours doesn't mean they shouldn't. You do important work, and the funder will be lucky to learn about it. However, grants take a fair amount of time, so when making the decision to invest your precious time into an application you should go into the process with eyes wide open about the likelihood of being funded.

Questions to consider if you're a good fit with a funder:

- Does your work fit the funder's mission and current priorities?
- What kind of work and organizations have they historically funded?
- How large are those organizations compared to yours?
- Is the funder familiar with your work, for example do you have any relationships with them? Have they come to community events or made site visits to familiarize themselves with your work?

If you've come this far and believe you have a chance of receiving funding (balancing the time and effort you will put into applying) we're excited you've found a grant that's a great fit for you, happy grant writing!



### **If you chose not to apply to the grant right now:**

If it doesn't make sense to apply for this grant now, don't be discouraged. You may want to make a note on what some of the barriers were in case you want to revisit this grant again. Some example reasons:

- If your organization doesn't meet some basic eligibility but soon will, you could apply then.
- If you don't currently have time for the application process, perhaps you can apply with a future round when you have more time to prepare. Note the date of the application period and set a reminder to yourself and/or your team for the following year.
- If it's not a good fit for your programs right now, in the future you could circle back to see if the funder's priorities or your work goals have changed. Sign up for the funder's newsletter and follow their social media pages to stay up to date with their funding priorities.

Use the worksheets below to determine if a funding opportunity is the right fit for you.

## Should We Apply? Worksheet

Use this worksheet to determine if a grant is a good fit for your organization. By answering the questions below you will have a better understanding of your organization's capacity and will be able to prioritize opportunities that are more likely to be successful.

Eligibility	Yes	No	Maybe (Add Notes)
Does your organization meet their basic eligibility? (i.e. 501c3 status, geographic location, etc...)			
Are you doing programming that they are prioritizing to fund?			
Is your org budget the right size?			
Are there any prerequisites to apply? If so, do you meet them?			

If you answered no to any of these questions, this is not the grant for you right now. If you answered yes to all of these questions, keep considering this grant and read the next section.

Do you have the time and capacity to undertake this grant process right now?	
When is the application due?	
How many hours do you think it will take to complete the grant?	
Who on your team can help? (see the "Who is Your Team?" module for insights and ideas)	



## Getting to Know Your Funders

If you're interested in applying for a funding opportunity, take some time to research and follow the funders' work. Read carefully through the funder's website and giving history. What does your organization have in common with others that this organization has funded in the past? What does your organization do differently that could set you apart and make you an appealing candidate for this donor? If possible, take time to find out more about the organizations they fund. Remember, funders fund their interest. Does their interest align with your work?

**Some grantors will host informational calls or Q&A sessions before or during a grant writing process.** You can search if this is something your grantor offers, or even reach out to them and ask if they do (but don't ask them directly till you've checked the information isn't already on their website).

We also want to note that some funders don't accept new applications from organizations they haven't worked with before. If that's the case, make a note that you want to work on building a relationship with the funder (using some of the below ideas) so you'll be ready when they are open to funding new organizations.

Looking to the future, are there things you could do to **cultivate a relationship with the funder**? Do they have a **newsletter that you can sign up for** to receive updates? Do they host **webinars, workshops, or other events** that you and/or your team can attend? Consider reaching out to them directly - some funders will be happy to accept information about your organization, or if they are local might even consider a site visit. Building relationships and making your work visible to a funder can be a great way to let them know who you are. By the time they see your grant application, they'll have an idea of your work!



## Module 6: Grant Writing Basics

### Purpose and Objectives

#### [Grant Writing Basics Intro Video](#)

#### **Purpose**

This module will provide you with insights on how to plan your grant writing strategy, hone your organization's unique language and style, and craft appealing grant proposals.

#### **By the end of this course, you'll be able to:**

- Identify all of the materials you need in order to put together a polished grant proposal;
- Develop a project plan that will help your team stay on track and meet all of your grant deadlines'
- Organize and draft your grant proposal in a way that is clear, concise, and appealing for readers;
- And navigate important dynamics with funders to stay empowered as an organization.

The **Building a Budget** section, referenced in the above video, is the next module in course and will explain the budget building process.

#### **Building a Proposal Overview**

Welcome to Grant Writing Basics! Before we keep going, let's do a quick overview of some key parts of building a grant proposal. Below are general steps you should take when creating your grant - each of which has a corresponding module in this Getting Grant Ready course. You can click on each to revisit its module and learn more. Note, while we've numbered these parts, and some should happen in chronological order, they won't all happen in this order and you will likely work on some concurrently.



- Part 1. Check that you're eligible and establish the grant is a good fit for your work. See EJUSA module: Should we apply for this grant?
- Part 2: Gather your team of folks who can help you with this grant. See EJUSA module: Who is your team?
- Part 3. Develop an action plan for grant completion. See EJUSA module: Should we apply for this grant?
- Part 4. Answer the narrative questions in the grant. See EJUSA modules: How to tell your organization's story; How to develop mission and Vision; How to develop org goals, How to develop action plans.
- Part 5. Prepare budget(s) & answer grant's financial questions. See EJUSA module: How to build your budget.
- Part 6. Carefully proofread your application (ideally involving someone who didn't closely write the original so they are looking with "fresh" eyes). Keep an eye out for spelling and grammar mistakes, and also ensure you are explicitly answering each question. More on that in this module.
- Part 7. Submit the application on time, with all the materials and formats the grantor requires.

### **Reading Between the Lines: Grant Writing Strategically**

Many grant applications request similar information. What is your budget? Why is the issue that your organization focuses on important, and what is the impact of your work? Some elements of your proposal won't change from application to application, like your mission and vision, certain project descriptions and demographic information won't frequently change, and you can copy and paste them from your materials.



**But when different funders ask you to describe your work, it's helpful to know what they are *really* looking for.**

What are this funder's priorities? What organizations have they funded before, and how is your organization both similar and different from those orgs? What about the work that your organization does makes this funding opportunity a best fit for both of you?

Grant makers want to fund organizations that are aligned with their mission, and that make them appeal to people who want to understand (and believe) their social relevance. When writing your proposals, make clear connections between your work and how it aligns with your funder's unique priorities.

As you write more applications, you may be asked to provide information on your work using different word and character limits, or to discuss different topics like how your organization approaches issues of equity. Every time you encounter a new element to a grant application that you haven't had to fill out before, it's helpful to save your response in a folder so that you can reference it if that question pops up in another proposal later on.

For more samples of grant application questions, see "How to Draft a Grant Outline."

## **Racial Equity and Grant Writing**

[Racial Equity and Grant Writing Video](#)

## **Fundraising with confidence**

Writing about your work may be new. Depending on what your experiences with writing have been — personally, professionally, in school or otherwise — the thought of writing may bring up some feelings of discomfort or insecurity, even for those who have been fundraising for years.



Generations of racism throughout the U.S. education system have fostered deep inequities that have disproportionately impacted Black, Brown, and indigenous people. This has taken the form of forced erasure of indigenous languages, shaming of culturally specific language practices, and lower literacy rates for communities of color across the board. It can be intimidating to write and submit language that will be under the review and scrutiny of an audience that, may not share your perspective nor understand the role that white supremacy has played in the systematic erasure and condemnation of language. If you are unsure about the strength of your writing, here are some practices and tips that may help navigate the grant writing process with greater confidence:

- **Start with a rough draft.** Don't worry about it making sense or sounding good — just focus on getting all of your thoughts on the paper. It's always better to write much more than you need to and then edit down, than to hold yourself back and forget to include a great idea or phrase that came to mind earlier.
- **Bring in your people!** Another pair of eyes can make the draft even better. Most written works are not done solo.
- **If you're feeling writer's block, try speaking your thoughts out loud and recording them.** If the idea of putting something on paper is intimidating, grab one of your team members and the voice recorder on your phone. Hit 'record', have your team member ask you questions, and just talk. You can ramble, you can take long pauses, but let your thoughts come freely and naturally, as if you're just chatting with your colleague. When you feel like you're done, listen to the recording back again. You might be surprised at your responses. If you need insights for your writing from other leaders in your org, this can also be a great process to get invaluable information from other busy leaders.
- **Ask for feedback.** If you receive a rejection, ask the grantmaking organization for feedback and share that feedback with your team. If the feedback is genuinely helpful and not harmful, it can inform you on what edits you and your team can make for the next grant cycle.

**People-First Language: Writing with dignity for marginalized communities, people, and populations**



As more organizations, universities, and government groups study social inequity over the past decades, several pieces of coded language have emerged to describe Black, Brown, poor, and other marginalized groups of people. Words and phrases like “inner city,” “urban”, “at-risk” and more are often used to describe communities. Some fundraisers may feel pressure to lean into this language because it is familiar for funders, but you know your organization and the people you work with the best.

Who are your people? How do you describe them? Do you work with young Black men who are survivors of trauma? Say so. Specificity is your friend for several reasons. It honors the humanity of the people that your organization works with, it paints a picture for newcomers to your work to best understand what you do, and it is an opportunity to reframe how people understand your work and the community (or communities) that you are in.

Several organizations work with people from distinctly sensitive populations. These include current and formerly incarcerated people, undocumented communities, survivors of violence and more. Popular yet harmful labels like “felon”, “convict”, “illegal alien”, “battered woman” are often used to describe people with these experiences, but they strip individuals of their personhood, dignity, and right to empathy. A simple guideline is to describe the people you serve as specifically as possible, starting with their humanity rather than their circumstance. For example, instead of “Battered women” you would say “women who have survived domestic violence”. If you are having trouble describing the people and communities that you are working with, there are several free online guides to help. This is not a comprehensive list, but is a great place to start:

- [Messaging this Moment: A Handbook for Progressive Communications](#), by Center for Community Change
- [A Progressive’s Style Guide](#), by Sum of Us
- [Social Justice Phrase Guide](#), by The Advancement Project & Opportunity Agenda



## Your Grant Outline

### [Creating a Letter of Intent Outline Video](#)

Now that you have all of your materials, an understanding of your budget, goals, and *how* to find and engage with best-fit funders, let's write! In this section, we'll go over some key techniques when organizing your grant proposal, as well as writing tips to make your proposal stand out to grant makers.

## Outlining Your Proposal

Different grant proposals will ask different questions about your organization and your work, but many of these questions and requirements will be similar. Once you have all of your materials (mission and vision, program plan, budget, etc.) ready to go, take a look at what questions the funder is asking.

- Are there any specific areas of your work that you might want to highlight in your proposal? Can you do this while staying true to your organization's mission and vision?
- Organize your responses with an outline. When answering responses and completing your proposal narrative, think about what the best flow of information will be for someone who is reading about your organization for the first time. Do you start with statistics and demographic information? Do you start with a story highlighting one of your clients?
- When you're ready to write, download the **Grant Application Outline Template** below to develop your application strategy, assign team mates to different sections of your application, and track progress.

# Getting Grant Ready

## *How to Draft a Grant Application - Outline*

Completing a grant application can be daunting considering how much information you may be required to share. If you are applying for a grant but are not sure how to start, using an outline can be a useful writing tool to support you in organizing your information and guide you through completing the process one step (or section) at a time.

1. At the top of the template or your doc, be sure to **add the link to the grant application, the period of the grant funding and the grant application deadline**. These three items will help as guidelines during the grant writing process.
2. Using the template below (or creating your own), **record each question** or requested piece of information. Separate each question or information requested by line as seen in the template. Remember to include any additional context the proposal may ask regarding each question or request.
3. Toward the end of the template, you will see the Grant Application Checklist, review your grant application and **record any supporting documentation** you will need to add to your application.
4. Once you have recorded all of the questions and supporting documentation, sit down with your team and partners (if applicable) and **determine who will be answering which questions on the application**. Once a question has been assigned, at the team or partner member's name to that question.
5. Once questions have been assigned, **determine the deadlines** in which everyone will need to have their questions completed by. (All questions and supporting documents could be completed and collected one week prior to the application deadline. The budget could be completed two weeks prior to the application to allow room for revisions.)
6. **Check-in with your team** on a periodic basis (every few days to weekly, depending on the deadline) to track progress toward completing the application. If applicable, have everyone complete their questions on a shared document (i.e. Google Doc).



## Defining Your Writing Style

When we write grants, we're trying to give funders as much information about our organizations and programs as we can. Grant writing is more technical than creative, but we can still keep our writing clear, specific, and understandable for the reader.

### Short and Sweet: Sentence Structure in Grant writing

Take a look at the following sentence:

*Nikki Burton is the founder and executive director of the Highland Park Community Center, a decades-old organization that she founded in 1996 with other exceptional residents of her beautiful, thriving neighborhood, to increase communication among her neighbors and to create different opportunities for the neighborhood to collaborate and come together.*

This sentence is okay, but it takes us off track by trying to say several things at once: **Who Nikki Burton is, what she does, when and why the Highland Park Community Center was founded, and who she founded it with.** Run-on sentences like this one can be difficult for readers to understand.

Removing unnecessary descriptors and breaking these points up into different sentences makes them easier to understand:

*Nikki Burton is the founder and executive director of the Highland Park Community Center (HPCC). Burton and fellow Highland Park residents launched HPCC in 1996 to increase communication and collaboration among neighbors.*

### Your grant can be conversational, but not too casual.

Grant writing is technical, but your proposals don't have to (and shouldn't) use large and unnecessary words to get your point across to your funder. Like the examples above, aim to get your point across with as few words and as clearly as possible. Let's try the sentences above with a few changes:



- Nikki Burton, a wildly luminous virtuoso of community organizing and relationship building, is the founder and executive director of the Highland Park Community Center.
- Nikki Burton is the founder and executive director of the Highland Park Community Center. The center has been around since 1996, and residents love it.

The first sentence adds a lot of descriptors about Nikki Burton that are not necessary for the funder, and that can be confusing. The second set of sentences is more direct and easier to read, but it also is too casual and funders may not take your proposal seriously.

Take a look at this alternative:

*Nikki Burton is the founder and executive director of the Highland Park Community Center. Opened in 1996, the Community Center has twice been awarded the Highland Park community choice award for service.*

*This sentence is easy to read, uses simple language, and clearly describes the organization and its accomplishments. By showing that the organization has been present since 1996 and has won two awards, it also reveals that Nikki is an accomplished leader.*

### **Write from the third person perspective.**

When referring to your organization, team, and even yourself, always use the name of the organization and the titles of the individuals you are writing about. Phrases like “I”, “we”, and “us” can come off as too casual for grantmakers. So instead of saying: **We** are breaking cycles of trauma, you’d say **EJUSA** is breaking cycles of trauma.

### **Grant Writing Language**

Language can make or break a grant application. Try the following tips when writing your next application to make your application stand out to funders in a clear and concise way.



## **Avoiding “First & Only”**

A lot of our organizations are doing incredibly necessary and important work in our communities, often without support or other models to follow. You may be the first or only organization to have a certain program or approach in your community, city, or state. Before saying this in your grant proposal, however, carefully research any other models that may exist in your region. If you find others that are similar, determine what makes yours unique.

Example: An organization is working with local parents to build financial stability through job training, community lending circles, and educational workshops. Their model is unique and needed in the community, but is based on practices that are common among other cultures and communities.

Instead of saying that their organization is the “first” or “only”, the applicants can instead highlight the components of their organization and programs that stand out from others in their field by naming their goals, inspiration for the work, and the success that they have had so far. Is their model one of a few programs in the state? Is there something specific about the demographic of the parents that they work with that makes this approach innovative? These are great things that can be highlighted in the application that will strike a balance between showing how the organization is unique, while honestly describing its position in the field.

## **Show, Don’t Tell**

When describing the qualities of a person, program, or organization, it’s best to rely on facts and examples rather than adjectives and descriptors. Here are some examples:

- Example 1: Organization Z’s director, Jane Doe, is an effective and accomplished leader who is well-received by the community.
- Example 2: Within one year of joining Organization Z as executive director, Jane Doe launched two free summer meal programs for children, and worked with the staff and leadership to implement an equity review board to deepen Organization Z’s partnerships with the



surrounding community. Her commitment earned her Community Member of the Year award from the Londonville School District in 2021.

While the first example describes Organization Z’s director, it does not tell us *how* she’s effective, accomplished, or well-received. By sharing some of the director’s achievements, work, and honors, the second example shows us all of this in a clear and direct way.

### **Be Careful with “Insider Language”**

Even if you have a relationship with a funder, it’s best to assume that when a grant maker is reading your proposal, it is the first time that they are learning about your organization, your community, and the issues that your organization was founded to solve. Because of this, we want to avoid using “insider language”, the jargon or other terms that might be very familiar to your work but that someone on the outside might not know. Let’s take a deeper look at some examples of insider language and how we can avoid them:

**Jargon and Acronyms:** Acronyms are great if you want to shorten the name of your organization or a specific issue that you work on, especially if you’ll be referencing it multiple times in your proposal. Before jumping right into an acronym, spell it out fully and then provide the acronym in parentheses. When describing a specific issue or group, it might also be helpful to define that group or issue for your reader.

**Example:** The Nebula Collective builds political awareness and engagements among African, Latinx, Asian, Arab, and Native American (ALAANA) youth in Chicago.

### **Keep Your Reader Engaged with Active Writing**

Grab the reader’s attention by using active, verb-oriented language. Active writing avoids words like “is” and “was”



For example, saying “Organization Z has been led by Jane Doe since 1998” could be more clear. Instead, you might say something like “Jane Doe founded Organization Z in 1998.”

This isn’t something we can always avoid. When naming specific team members and their titles, for example, it is better to say “Jamila Hodge is the Executive Director of Equal Justice USA” rather than “EJUSA, directed by Jamila Hodge”

### **Communicate Confidence**

When describing your organization, stand firm in what you do and what you will achieve. Removing “helper phrases” like “works to” and “hopes to” and writing about your work with certainty shows funders that you are confident in your mission, vision, and abilities as an organization and as leaders.

Here are some examples:

Organization X works to provide survivors of violence with support through wraparound services like therapy, relocation assistance, and childcare. In doing so, they aim to ensure that survivors receive what they need to secure safety and wellness.

This is a great description, but what if we removed some of those helper words like “works to” and “aim to”?:

Organization X supports survivors of violence through wraparound services like therapy, relocation assistance, childcare, and more, ensuring that survivors receive the resources they need to secure safety and wellness.

### **Keeping Your Reader Engaged**

Once your draft proposal is complete, it’s time to edit.

**Here are some common things to look out for when editing your proposal:**

- Run-on sentences



- Confusing language (jargon, acronyms, and more)
- Repeated information, phrases, and words
- Grammatical errors and punctuation mistakes
- Double spaces (especially when writing a new sentence!)

**Some helpful things when reviewing your proposal:**

- Take time to read your proposal out loud, and slowly. It will be more obvious where there are sentences that need to be fixed.
- Have a thesaurus nearby, or use google to search for definitions and synonyms. If you've said the same keyword multiple times in a paragraph, find some alternatives that send the same message without being repetitive for your reader.
- Have at least one other person read your proposal for you before you submit to consider any additional feedback or edits.
- Print your proposal on paper instead of looking at it on a screen. This can make it easier to read, check errors, and annotate.
- Ensure you have clearly answered all the questions asked for in the grant.

You can use the **Copy Edit Checklist** below to review your writing and ensure that you're submitting your best work possible. As always, it's helpful to have at least one other team member with you to review your work.



# Getting Grant Ready

## *Copy Edit Checklist*

Once you have a completed draft of your proposal, you can use this copy editing checklist to review your writing and ensure that you're submitting your best work possible. As always, it's helpful to have at least one other team member with you to review your work.

### **MECHANICS**

Use this section to review the more mechanical parts of your writing like spelling, punctuation, and grammar. If you need additional support with mechanics, check out the resources list at the bottom of this page.

- Read out loud, word for word. After looking at the same document for a while, it can be easy to gloss over the details and miss errors. Read each of your responses out loud, slowly. If you have access to a printer, it can be helpful to print your responses so that you can read them away from a screen.
- Spellcheck. The spell check tool in word processors is helpful, but they can often miss some errors. Take a careful look at your spelling.
- Grammar. Same as spelling, a computer's tools can miss some of our errors. Review your writing to ensure that sentence structure is clear.
- Capitalization and Titles: Ensure that all of the necessary words and titles for individuals, programs, places, and entities are capitalized correctly. If you're not sure, check out an [online tool](#).
- Remove double spaces between words at the beginning of sentences.
- Number spelling. Ensure that all numbers under 10 are spelled out completely. Larger numbers can be listed as numerals. If you are starting a sentence with a number, spell it out (example: "Thirty-six years ago, the organization launched a community service program")
- Font. If you are submitting a written document (rather than putting your responses in an online form) ensure that you are following all rules that your funder may have regarding font style, size, and margins.
- Punctuation. Make sure that all sentences and paragraphs end with periods, and that commas are used appropriately.



## Deep Dive: Mission Drift in Grant Writing

Mission drift occurs when an organization shifts away from its original goals, values, and mission over time. This can happen for a number of reasons, like changes in staff and leadership or events taking place in the world and the surrounding community that compel an organization to change how they operate. Mission drift can also occur due to financial pressures like funding opportunities and donor priorities.

To stay true to your mission and vision, it's important to avoid creating new programs to satisfy a grant requirement, or changing your programs to fit into what you think a specific funder might want to see. When writing a grant, take care not to stretch the descriptions of what your organization does.

The promise of getting more funding is exciting, but staying true to your work will help you avoid unintentionally misleading potential funders. Let's take a look at two examples:

### Example 1

- XYZ Arts & Sciences is an afterschool program founded to merge the arts, math, and science to create unique learning experiences for teenage girls. The organization won awards for their well-rounded programming and the creative way that they combine these different subjects to make them appealing for young people.
- XYZ has an \$800,000 annual budget. After learning of their success, a donor wants to give \$1 million to the organization over the course of two years, but only for the math and science programs. XYZ takes the money and puts it to use. Over time, however, the focus on math and science slowly takes over, reducing the time, resources, and attention for the arts curriculum and staff. While this change is subtle at first, the organization begins to lose a core part of its mission.



## **Example 2**

- A small tutoring program works with middle schoolers to improve their test scores. They've had great success since they began, but will need to raise more funds to support their work.
- The director learns of a \$5,000 grant that could really help the organization to stay afloat over the next year. However, the funder primarily focuses on organizations that provide mental health and wellness support for children. If this tutoring program were to apply for this grant, they would be required to shift a great deal of their programming to increase mental health and wellness components, which could potentially compromise their stated mission.

For more information on mission drift and staying on course when writing grants, see the “Should We Apply for this Grant?” module.



## Module 7: Building a Budget

### Purpose and Objectives

#### [How to Build a Budget Video](#)

##### **Purpose**

This module will help you to understand and build various types of budgets needed for grant applications.

##### **By the end of this module, you will have the tools needed to:**

- Understand the difference between Organizational and Project budgets and how they work together;
- Develop an organizational and project budget;
- Have an understanding of why standard line items are important; and
- Understand there are reporting requirements from receiving grants.

In addition to the narrative section of your grant where you tell the story of who your organization is and what you will accomplish with the grant, you will also be asked to produce budget(s). This module will provide an overview of different types of budgets and how they work together. **Typically there are two types of budgets:**

- **Organizational budget:** This is the master document of all revenue and expenses for your organization during a fiscal year (most organizational budgets run annually). They will often include one or more Project budgets.
- **Project budget:** This is the overview of all the revenue and expenses associated with an individual project within your organization.

**Below are a few things to remember as you explore the rest of this module and begin building your budgets.**

- [Key Budget Info Video](#)



You should build budgets based on what you need, not the limits of a grant. Ideally, your budget creation process will happen independently from your grant writing. You are building budgets for your organization, not for grants. Then at grant writing time you can adjust your project and organizational budget to fit grant templates as needed.

It is best practice to first build project budgets for each of your organization's main projects and programs, and from these project budgets put together your organizational budget. Your organizational budget will be a compilation of all project budgets and any additional "overhead" costs not accounted for in the project budget. Overhead costs include things like rent, insurance, utilities, etc.

Costs that are spread between projects or partially used on projects - like rent or salaries - can be included in project budgets based on the percentage of the resource devoted to that project. For example, a staff person who spends 50% of their time working on one project should have 50% of their salary accounted for in that project budget.

It is best practice to be as specific as possible in the creation of your budget. For example, if you have a line item about attending conferences, if possible, include which conferences you will be attending and how much will be spent at each conference. You may well remove some of this information before submitting the document to a grantor, but it's best to create your internal budgets with as much specificity as possible.

It is normal that there will be deviations from your budget and your actual spending. Budgets are your best guess about what expenses and income your organization will have - it is not a promise set in stone. Do not be afraid to make an educated guess knowing that as real life unfolds the actual numbers will likely be different.

**The sections following this one will dive deeper into topics on how to create budgets and budget narratives, as well as organizational finance.**



### **Before you begin:**

- Identify who is in charge of creating the budget (usually the Director of Finance, or Executive Director) and who else needs to be a part of the process (should include your Executive Director, lead program staff, and at least a liaison to the Board of Directors). In 501(c)(3)s the board will usually give final approval to the organizational budget.
- Gather helpful supporting materials such as: last year's budgets, lists of past actual expenses and income, the organization's strategic plan (or yearly goals if you don't have a strategic plan)
- Establish a timeline so everyone involved in the creation of your budget is on the same page. Ideally, your budget creation process will happen independently from your grant writing. Remember, you are building budgets for your organization, not for grants. Then at grant writing time you can adjust your project and organizational budget to fit grant templates as needed. See [The Blue Avocado: Practical tips for Nonprofit Budgeting](#) for more specifics of what could be in this timeline process and a sample timeline.

Help and inspiration for this section came from the piece on [The Blue Avocado: Practical tips for Nonprofit Budgeting](#).

### **Building Your Budget Templates and Other Resources**

Work with your team to start creating your project budget(s) and organizational budget. The below templates contain commonly included line items, explanations of line items, and prompts to help ensure you are properly accounting for all your revenue and expenses.

### **Remember the differences between the two types of budgets:**

**Organizational budget:** is the master document of all revenue and expenses for your organization during a fiscal year (most organizational budgets run annually). They will often include one or more Project budgets, as well as your



Administrative budget, which includes costs not associated with one specific project.

**Project budget:** is the overview of all the revenue and expenses associated with an individual project within your organization.

If your organization has separate project budgets, you can use this

[Organizational Budget template](#)

If you do not have project budgets, but just one organizational budget, you can use this [Organizational & Project Budget template](#).

In both of these budgets, start on the first tab "Instructions" for detailed information on how to use the templates.

If you'd like to brainstorm your budgets on paper, printable templates for budgets are located below. Follow the instructions in the workbook. When you are ready, input the budget information from the workbook into the digital templates above.

## Budget Building Workbook

This workbook is meant to provide a space for you and your team to brainstorm your program and administrative budgets. Follow the instructions below in order to use this workbook and the digital budget template in the Getting Grant Ready module:

- Review the various sections in each of the budgets below.
- Consult with your team to determine the estimated cost of each line item, and use those estimates to fill out the tables in this workbook.
- Once you have filled out the workbook, visit the [Organizational & Project Budget Template](#) in the Getting Grant Ready module. Make a copy of the template for your organization to keep.
- Carefully read through the "Instructions" tab in the template. One by one, start adding the line items from your workbook into the program and administrative budgets in the template. Once you add this information, the digital budget will calculate your organization's total income and expenses. You can find these totals in the "Composite Organizational Budget" tab in the template.
- When you are done, the digital template will automatically calculate the totals of your program and organizational budgets. You can use this information to check your estimates and adjust your budgets as necessary.

**Note:** This workbook has budget worksheets for one program budget. If you need more program budget worksheets, you can download them from the Building a Budget module in the Getting Grant Ready platform.



## Developing Your Budget Narrative

- [Building Your Budget Narrative Video](#)

A budget narrative helps funders understand the scope of your organization or program. It serves as a summary of your expenses including, but not limited to:

- Staff roles and salaries
- Fringe benefits
- Travel
- Supplies
- Contractors
- Evaluation

Your budget narrative should be aligned with your budget and reflect the same cost breakdown. If your budget tells *how* you will spend funds, your budget narrative tells *why* each line item is necessary.

Although many funders will not ask for budget narratives, it is helpful practice to understand the *why* behind your budget. Try this activity to develop your budget narrative.

- List all the expenses you will need for your program or organization - you don't have to include a dollar amount
- After each item, write why that expense is necessary.
- Then, go deeper with your why by explaining further. Consider how it will benefit your program, community, or individuals in your organization.
- Lastly, write out how your program will be impacted if you did not include each item in your budget.

Using your results, you can draft a budget narrative that justifies your expenses and keeps your budget connected to your mission and vision. When you're applying for a specific grant, check the grant guidelines.

You can use the attached worksheet and sample narratives for guidance and examples.





## SAMPLE - Budget Narrative – SAMPLE

(NOTE: The Budget Narrative is the justification of 'how' and/or 'why' a line item helps to meet the program deliverables.)

- A. Salary – Total: \$54,818.00**  
**Program Director** currently oversees the program and will spend 100% of their time hiring, supervising and training staff. This individual's annual salary is \$26,596.00 and will be covered for the 12 months of the contract.  
**Program Coordinator** will spend 100% of their time providing direct service to the participants (describe services). This individual's annual salary is and will be covered for the 12 months of the contract totaling \$22,000.00.  
**Program Assistant** is a part-time assistant which will provide (describe services). This individual's annual salary is \$9.15 per hour for 20 hours a week for 34 weeks of the contract year totaling \$6,222.00.
- B. Fringes – Total: \$18,629.00**  
FICA will be paid for all salaries: \$54,818.00 x .0765 = \$4,194.00.  
Unemployment cost is \$17,300.00 x 3 x .03 = \$2,855.00.  
Retirement for full-time employees: \$48,596.00 x .06 = \$2,916.00.  
Health Insurance cost for full-time employees is the following:  
Director: \$357 x 12 months= \$4,284.00.  
Coordinator: \$365 x 12 months= \$4,380.00.
- C. Staff Development – Total: \$300.00**  
The Program Assistant will attend Classes at the local community college to continue their education in the area of social work and administration for two semesters. 2 semesters x 2 classes x \$75.00 per class=\$300.00.
- D. Travel – Total: \$1,689.00**  
The staff is expected to travel around the county/State to visit sites, attend meetings and trainings/conferences, meet with county partners, visit families etc. The agency reimbursable rate is 0.445 and not the Federal rate of 0.585.  
Program Director 300 miles x 0.445 = \$134; Daily Subsistence \$91.75 x 5 days = \$458.75; Total 593.00.  
Program Coordinator 200 miles x 0.445 = \$89; Daily Subsistence \$91.75 x 5 days= \$458.75; Total \$548.00.  
Program Assistant 200 miles x 0.445 = \$89; Daily Subsistence \$91.75 x 5 days = \$458.75; Total \$548.00.
- E. Equipment Purchases – Total: \$1,200.00**  
One computer package including printer, scanner, and Word Programs will be purchased. The computer will be based in the administrative office and will be used to develop and maintain client databases in addition to performing administrative work connected to this program.
- F. Transportation-Recipient – Total \$4,380.00**  
Due to the lack of transportation services in the county, transportation is provided for families and children to participate in activities.  
Gas: \$100.00 a month x 12 months= \$1,200.00  
Insurance: 0 Automobile Liability per year for \$480.00  
Repair and Maintenance: Routine Maintenance for Van (oil change, tires, etc.) as needed \$300.00.  
Van Rental For use of County Transportation Vans (\$200.00 a month x 12 months) = \$2,400.00.
- G. Medical Supplies and Expense – Total: \$100.00**  
4 First-aid kits will be purchased in case of a medical emergency. 4x \$25.00 = \$100.00
- H. Cost of Space – Non Residential – Total: \$7,133.00**

**Instructions**

The goal of this document is to help Rose Community Foundation staff understand the scope of your organization or project/program.

Address the five largest categories of expense *and* revenue in the project/program (for project/ program requests) or organization’s operating budget (for general operating requests).

**For expenses**, describe each category, explaining how amounts were derived and how the expense relates to the request goals.

**For revenue**, address the status of requests to other funders (listing names rather than categories) and the likelihood the revenue goal can be met within the proposed grant period.

**For project/program requests**, indicate whether the proposed project/program budget is *included in* or *in addition to* the organization’s operating budget.

**For multiyear requests**, include narratives addressing the budget for each fiscal year of the proposed grant period.

---

**Example Narrative**

*This example is purposely generic, as budget narratives vary widely. Depending on the complexity of your organization or project/program, you may need to be more or less elaborate accordingly.*

**Expenses**

- **Staff: \$46,000**  
Salary and benefits for one full-time program director for one year to manage project implementation. Responsibilities include serving as the primary contact for participating agencies, overseeing data collection and performing administrative duties.
- **Evaluation: \$12,000**  
A consultant will track and evaluate the project, provide recommendations for improvement and new funding streams and document impact in a final report. The consultant will also work with the director to create a replicable model that can be used to expand the program to other target areas. The cost is \$500 per month for the 24 months coinciding with the proposed grant period.
- *...continue to describe the five largest categories of expense...*

**Revenue**

The following proposals are pending:

ABC Foundation	\$ 5,000
DEF Foundation	10,000
GHI Foundation	2,500
<b>TOTAL:</b>	<b>\$17,500</b>



## **Racial Equity and Organizational Finances**

### [Racial Equity and Organizational Finances Video](#)

Most organizations have never had the resources needed to reach their full potential. This, understandably, can create a “scarcity mindset” - which is the idea that there isn’t and could never be “enough”. We want to encourage you to not be afraid to ask for what your organization truly needs, even if it’s the maximum amount a grant allows.

For some, there can be anxiety surrounding the inherent uncertainty in budgeting. It can feel scary to make a best guess about sources of income or exact expenses, but that is indeed what everyone making a budget must do. It is normal that there are deviations between your budget and your actual expenses and income. If you are able to demonstrate to a funder that your budget was made in good faith using educated guesses, you will not be punished for normal variations and shouldn’t expect funders to micromanage your work.

## **Deep Dive: Additional Budget and Finance Resources**

Below are several resources that may be helpful as you build your budgets and track spending:

- [How to identify and quantify in-kind contributions](#)
- [Allocating time spent on various projects?](#)
- [Establishing proper wages for staff](#)
- [Calculating Fringe Benefits](#)
- [EJUSA’s Travel Calculator to assist you in predicting travel expenses](#)

### Additional Resources

- [The Blue Avocado: Practical tips for Nonprofit Budgeting](#)
- [Determining Salaries](#)