June 21, 2018
Fundraising fundamentals:
Use your assets to attract investments
Pollyanne Frantz
Today’s session:

- Introductions
- Strategies for identifying potential funders
- Locating & using proposal development resources
- Developing your “takeaway list” Part I
- Preparing strong proposals
- Session recap
- Developing your “takeaway list” Part II
- Q&A
Identifying potential funders: strategies

- Strategies to use (locally, regionally, & nationally):
  - Talk with colleagues within your profession
  - Talk with people related to your profession
  - Connect with your community
  - Do your research to determine the best fit between your project & the funder
Identifying potential funders: relationships

- Develop diverse partnerships
  - Businesses and industry
  - Higher education institutions (community colleges, four-year colleges & universities, trade/technical campuses)
  - Foundations
  - Faith-based entities
  - Service organizations
Identifying potential funders: sources

- Sources for local, regional, or national funders:
  - **Develop** a list of key words and phrases related to your project
  - **Scan** “literature” like newspapers, newsletters, annual reports, & strategic plans
  - **Search** databases: funders & funding opportunities, awards history, & potential collaborators
  - **Subscribe** to relevant electronic communications
- **Access sources through your library (public or college) & the Internet**
Sources: “Literature”

- Local media (press releases, news articles)
  - See who’s funding what
- Funders’ annual reports & strategic plans
  - A snapshot of history & a guidepost for the future
- Topical or funder-specific publications
  - Usually free & highly recommended
- Social media channels (Twitter, Facebook)
  - Good source of current & timely information
- Funders’ websites
  - All of the above & more
Sources: Databases & websites

- **Federal (free):**
  - [Grants.gov](https://www.grants.gov)
  - “Assistance Listings” on beta.SAM.gov (former CFDA)
  - [Federal Register](https://www.federalregister.gov)
  - [USASpending.gov](https://www.usaspending.gov)

- **Funding opportunities (all funders):**
  - [Pivot (COS)](https://www.pivot.com)
  - [InfoEd SPIN](https://www.infoedspin.com)
  - [GrantForward](https://www.grantforward.com)
  - [Instrumentl.com](https://www.instrumentl.com)
  - [GrantStation](https://grantstation.com)

- **Private (foundation) funders:**
  - [Foundation Directory Online](https://www.fdionline.org)
  - [FoundationSearchAmerica](https://www.foundationsearchamerica.org)
Sources: Communications

- Foundation Center (RFPs) and (Philanthropy News Digest)
- Register @ Grants.gov and Federal Register to receive notifications
- Subscribe to funder notifications
  - USDA NIFA 4-H Highlights
- GuideStar resources
- State Science & Technology Institute (Weekly Digest)
- Rural Health Information Hub (rhiHub This Week)
Searching strategies

- Use your list of key words & phrases

- Search broadly initially & refine results

- Review key words & descriptors in initial results to launch additional searches

- Learn more about the funder: people; areas of interest; giving trends (awards history); giving amounts; & method of approach (contact)
Create a (realistic) grants calendar

- Consider it to be:
  - A planning tool to help you manage your time
  - A road map to pursue funding in a systematic fashion
  - A dynamic, living document

- Include these components:
  - Deadlines (hard & soft)
  - Reviews – timing of cycles & reviewer composition
  - Tasks associated with proposal completion
  - Special requirements (required LOI, matching funds)
  - Status (not started, pending, awarded, declined, renew)
What’s on your takeaway list?

“I’m going to __________”

“I’ve learned that __________”

“It’s important to __________”
Preparing strong proposals

- Reap the benefits of your prior research
- Master the basics (writing & budgets)
- Practice good time hygiene (respect the deadline)
- Follow the guidelines
- Complete the proposal
Master the basics: writing

- Follow the order prescribed by the guidelines
- Use an active voice & convey enthusiasm
- Be persuasive
- Write short, concise sentences
- Selectively use formatting to emphasize key points & enhance readability
- Avoid jargon & minimize acronym use
- Engage in robust editing: no typos or grammatical errors
- Avoid annoying the reviewers
Writing resources

- **Persuasion intersection** on YouTube (Jeremy Miner)

- **Plain language**
  - Before and after
  - Wordiness made spare

- Books & tutorials on sponsored research offices sites
- Agency-provided resources
Master the basics: budgets

What the budget is:
- It is your written narrative in financial form
- It reflects your best estimate of project costs
- It follows appropriate cost principles & other rules
- It is realistic – not too high, not too low
- It is detailed

What the budget justification is:
- A narrative describing the budget. It includes details about calculations & covers every item in the budget.
Budget resources

- Foundation Directory Online tutorials

- GrantSpace.org (“...offers information and resources that are specifically designed to meet the needs of grantseekers”)

- Sample proposals

- State & federal government rules & regulations & the people working there

- Colleagues performing similar work
Follow the guidelines... or disregard at your peril

- Read the guidelines at least once to determine:
  - Eligibility
  - Deadlines
  - Number of awards & dollar amounts
  - Formatting & submission requirements

- Read the guidelines more than once to understand:
  - Selected words, phrasing, concepts, & themes
  - Focus of funding: what does the funder want to accomplish?
  - Nuances of review criteria
Complete the proposal

- Share draft with colleagues far in advance of deadline to receive feedback & revise the proposal
- Obtain permissions
- Develop the budget
- Address compliance areas
- Secure letters of support or commitment
- Complete & assemble application forms
- Submit application & monitor submission process
Practice good time hygiene

- Start early
- Work back from the deadline
- Plan on everything taking five times longer than anticipated
- Build a buffer for technology-related problems
- Maintain good working relationships: avoid causing deadline-induced stress and negative behaviors
- Use your grant calendar
A quick recap

• Strategies
• Use available resources to develop your skills
• Work smart
• Become a detail-wonk
• Follow the guidelines
• Remember: everyone can master the art of writing compelling grant proposals!
What’s on your takeaway list?

“I will ________”

“I plan to ________”

“I now know about ________”
Thank you for your time today!

Pollyanne Frantz, Ph.D., CPRA
Sponsored Research Officer
The University of the South
735 University Avenue
Sewanee, TN 37383
psfrantz@sewanee.edu