Appalachian Higher Education Network Conference 2018

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Fundraising fundamentals:
Use your assets to attract investments
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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:
  - <u>Develop</u> a list of key words and phrases related to your project
  - <u>Scan</u> "literature" like newspapers, newsletters, annual reports, & strategic plans
  - <u>Search</u> databases: funders & funding opportunities, awards history, & potential collaborators
  - <u>Subscribe</u> 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
  - "Assistance Listings" on beta.SAM.gov (former CFDA)
  - Federal Register
  - USASpending.gov

- Funding opportunities (all funders):
  - Pivot (COS)
  - InfoEd SPIN
  - GrantForward
  - Instrumentl.com
  - GrantStation

- Private (foundation) funders:
  - Foundation Directory Online
  - FoundationSearchAmerica

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 tyypos or gramatickle 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 <u>every</u> 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
- <u>Use </u>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!

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