



# How to Prepare for a Grant



Tips for Staying Organized



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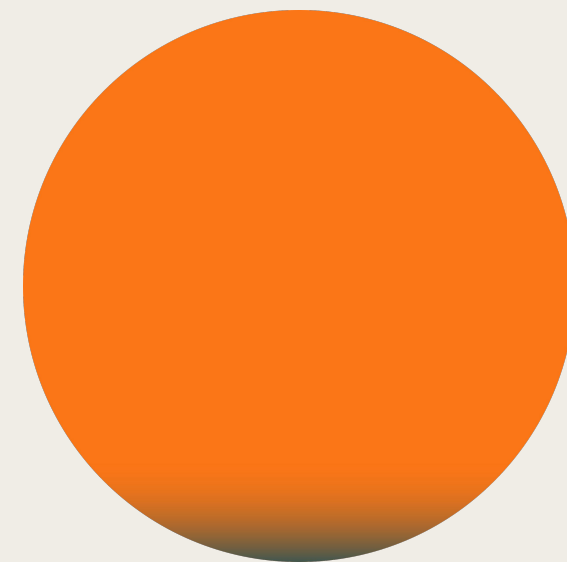
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# Today's Agenda

01	Webinar 1 & 2 Recap	03	Assembling Your Documents
02	Staying Organized	04	Business Plans Explained





01

# Webinar 1 & 2 Recap



# Let's Review

- **Things to Consider When Deciding Where to Apply:**

- Type of Funder
- Type of Grant
- Timeline
- Who will write the grant?
- Who will manage the reporting / communications if you win?
- Are you prepared for an audit?



01



# Will you need outside resources?

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- Grant Writer
- Grant Manager
- Partner Organizations
- Independent Contractors
- Marketing / PR
- Program Manager or other new stuff
- Conflict of Interest / NDA
- Recommendations Letters



01

02

Staying  
Organized



# Prospect Lists

A1								
	A	B	C	D	E	F	G	H
1	#	FUNDER	WEBSITE	PROGRAM AREAS	DEADLINES	AVG GRANT AMOUNT	Notes	FIT
2	1	Mabel A. Horne Foundation	<a href="#">LINK</a>	To support and promote quality educational, human services, and health care programming for underserved populations in Mass area.	15-Jan	\$2000-\$25,000	Administered by Bank of America, easy app. Commonly gives to many orgs that support human services and health for Black populations in Boston area.	GOOD
3	2	Charles F. Bacon Trust	<a href="#">LINK</a>	Funds health and human services in Boston area. General operating and program support grants are encouraged.	1-Feb	\$5K- \$20K	This is another Bank of America administered Trust. Has funded many similar programs before that have emphasis on underserved BIOC Boston communities and health disparities.	FAIR
4	3	AstraZeneca*	<a href="#">LINK</a>	Connections for Cardiovascular HealthSM Next Generation program - a program with the mission of improving cardiovascular health, in order to address a leading cause of death in the United States.	1-May	up to \$150,000	Program approaches can include: Leveraging access for uninsured and underserved participants to improve cardiovascular knowledge and health; Bringing programs to participants; Educating children to serve as heart health ambassadors; Improving cardiovascular health through food-based programs; Using health coaches/promoters to improve cardiovascular health; Providing culturally sensitive program interventions to maximize participant outcomes	GOOD
5	4	The Boston Scientific Foundation	<a href="#">LINK</a>	Health: The Foundation aims to improve the health of those who are economically disadvantaged, with a focus on cancer, respiratory, cardiovascular, neurological, diabetes, gastrointestinal, or urologic diseases and disorders. Programs should	1-Jul	\$3,000-\$40,000	Grants to benefit economically disadvantaged populations in health programs are defined as programs with: Minimum of 50% of program participants uninsured/underinsured at 200% of poverty or lower OR	HIGHEST



# Submission Calendar

Date	Status	Funder	Site	Type	Amount	Login Info/ Link/Notes
1/15/2022	Submitted	Virginia Hodgkins Somers Foundation, Inc.-LOI	<a href="#">LINK</a>	LOI	\$10k - \$25k	Carolyn will create google doc of LOI-adult day art ed programs
2/1/2022	Completed	John T. Gorman Foundation-Direct Service Grant	<a href="#">LINK</a>	RFP posted	Up to \$25,000	Basic needs support – programs or organizations specifically serving older Mainers--Nutrition focus
02/03/22; 9 am EST	Completed	John T. Gorman Foundation -Webinar for Direct Services Grant		Zoom info session		Emailed to register <a href="#">LINK</a>
2/15/2022	Declined	Community Building Fund-Maine Community Foundation	<a href="#">LINK</a>	application	\$10,000	Adult Day
2/15/2022	Awarded - \$5000	Maine Community Foundation - Hospice Fund	<a href="#">LINK</a>	application	\$5,000	Hospice Awareness
2/15/2022 Mail in mail	Declined	Libra Foundation	<a href="#">LINK</a>	application	\$15K	Adult Day





# Awards Tracking

Grant Name	Website	Date Submitted	Amount Requested	Award Notification Date	Amount Awarded	Reporting Requirements	Notes	Purpose
Virginia Hodgkins Somers Foundation	<a href="#">LINK</a>	3/15/22	\$10,000	06/07/2022	\$10,000	June 7, 2023		Adult Day
Summit Natural Gas	<a href="#">LINK</a>	5/13/2022	\$1500	6/3/2022	\$2000	??		
Narragansett Number One Foundation	<a href="#">LINK</a>	3/21/2022	\$5000	06/01/2022	\$5000	May 1, 2023		Buxton area
Simmons foundation	<a href="#">LINK</a>	04/15/22	\$5,000	5/20/22	\$5000	??		

03

# Assembling Your Documents





# Items You Will Almost Always Need

- **Articles of Incorporation**
- **Financials**
  - Organizational Budget (Actual vs. Expected) for last two years
  - Project Budget
  - Last three years of Tax Returns
  - Last three independent financial audits
- **Personnel**
  - Board of Directors affiliations list
  - Key Staff + Qualifications + CV / Resumes
  - Partnership MOUs
- **Policies**
  - Diversity, Equity, and Inclusion Statement
  - Hiring Policies
  - Safety Policies
- **Website and Social Media**
- **Annual Reports**
- **Photos / Videos** (headshots, pics of product or work)

# Your Business Plan

04





# Business Plan

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- Grantors will almost always ask for one to be attached to a grant
- There is no universal, standard grant application format- but there ARE common elements that pull from a business plan.
- Collect your thoughts on YOUR business plan NOT influenced by what the funder wants.
- Have materials ready to go if a last minute deadline sneaks up on you.
- Edit, Edit, Edit! Then spellcheck...
- Share with colleagues, get their opinion. But keep one central writer's voice!
- Identify research gaps in a timely manner.



# Common Elements of a Business Plan

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- Elevator Pitch / Executive Summary
- Business Description
- Analyses
- Sales and Marketing Plan
- Management and Organization
- Finances



# Executive Summary

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- Write this last, but place it first
- Limit to one page max
- Must be standalone
- Comprehensive of the entire plan, but keep it concise
- Make it compelling! Some orgs use executive summary to sift through many grants for “worth reading” or “goes at the bottom of the pile”



# Business Description

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- **History**
  - Keep it brief! One paragraph or two max
- **Statement of Purpose**
  - Mission = What you set out to do
  - Vision = What the world looks like when you achieve your goal
  - Goals = Overarching end goal
  - Objectives = Actions you will take to get there
- **Problem Statement**
  - Statistics and graphics are good!
  - Cite your sources
- **Services / Products Provided Summary**
  - Charts are good!





# Analyses

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- **Industry Analysis**
  - What industry do you fit into
  - Are you at nexus of a few?
  - Describe both size (\$\$ and #) and growth
- **Market Analysis**
  - Consumer Market Segments
  - Business Market Segments
- **Competitors Analysis**
  - Current and future competitors
  - Describe your competitive advantage



# Sales and Marketing Plan

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- Marketing Plan
- Communication Tools
- Sales Strategy

04



# Management and Organization

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- **Staff and Leadership**
- **Board of Directors**
- **Locations**
  - Admin Offices
  - Facilities
- **Operational Overview**
- **Partnerships**
  - Qualifications
  - Delegations
  - Locations
  - Dependencies



# Finances

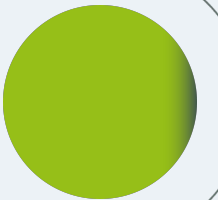
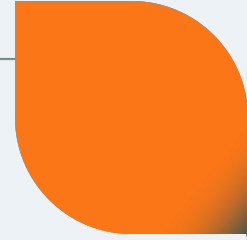
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- Financial Projections
- Funding Sources (if in a start up phase)
- Organizational Budget

fundid

Join Us Next Time:

# How to Write a Grant





Questions?