

2008 Medical Reserve Corps National Leadership and Training Conference



Prepared Volunteers, Resilient Communities, Strong Nation



April 8–11, 2008

Portland, Oregon

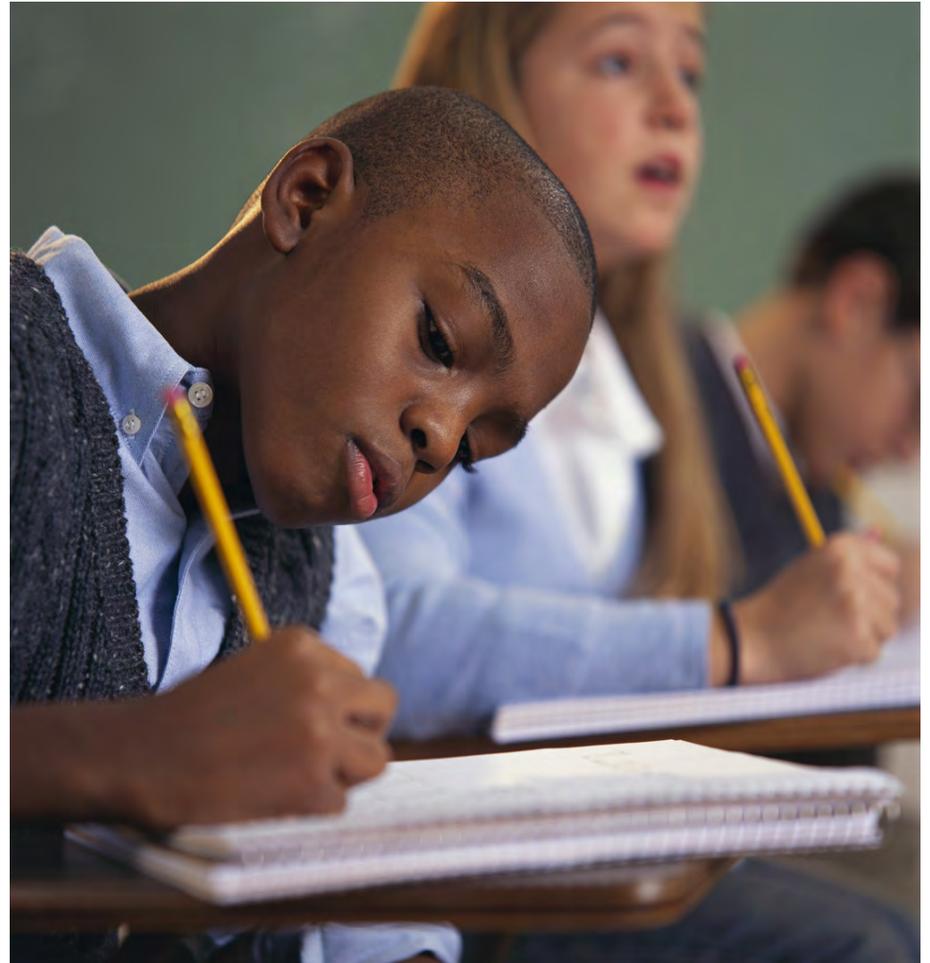


APRIL 10, 2008
MEDICAL RESERVE CORPS

GETTING THAT GRANT –
ARE YOU READY?

AGENDA

- **WHAT is a “Grants Program?”**
- **WHAT funders are looking for**



AGENDA

- **WHAT** needs to be in your proposal so you have everything
- **Evaluation**
- **An Action Plan** to get started
- **Some future resources**
- **Common errors and HOW** to avoid them



WHAT FUNDERS LOOK FOR

(Page 4)

- **A focus on client needs, not yours**
- **Unique programs and approaches**
- **A persuasive argument**
- **Specific data and evidence**
- **Homework!**
- **Details**
- **The whole picture**
- **Careful attention to the fine points**



WHAT FUNDERS LOOK FOR



- **REAL PARTNER- SHIPS**
- Specific roles for each. Partner with agencies that are eligible for funding your host agency may not be able to seek
- **Ammunition they can trust you to make a difference - a trust of the highest order**

WHAT IS A GRANTS PROGRAM?

(Page 5)

- **SYSTEMATIC** way to raise funds → **SPEND 60-70% OF TIME ON NOS. 1 THROUGH 3**
!!!!
- Five components:
 - 1. Readiness
 - 2. Research
 - 3. Relationships
 - 4. Proposal writing
 - 5. Tracking



PROPOSAL COMPONENTS

(Page 6)

- **EXECUTIVE SUMMARY**
- **FUNDING ARGUMENT**
- **PROGRAM DESCRIPTION**
- **GOALS, OBJECTIVES, OUTCOMES**
- **EVALUATION**



PROPOSAL COMPONENTS

- **BUDGET**
- **CULTURAL COMPETENCY**
- **ORGANIZATIONAL INFORMATION**
- **MATCHING OR LEVERAGING \$**
- **FUTURE SUSTENANCE**



READINESS-BOILERPLATE

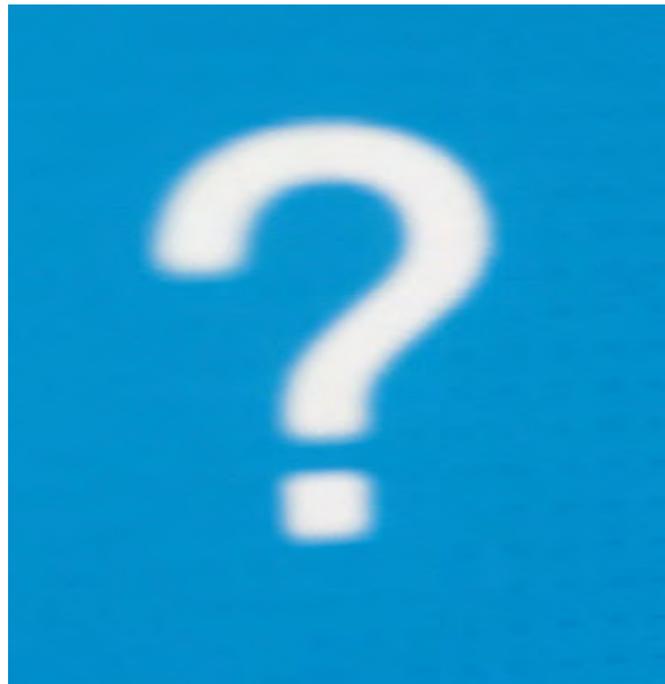
(Page 7)

- **Save time**
- **Speak with one voice**
- **Have time to develop new project**



ANSWERS WHAT QUESTIONS?

- **1. WHO**
- **2. WHAT**
- **3. WHY**
- **4. WHEN**
- **5. WHERE**
- **6. HOW**



FUNDERS' QUESTIONS

- **Mission Statement**
- **Program Description**
- **Needs Assessment**
- **Demographics**
- **Community Support**
- **History**
- **Collaborations**
- **Evaluations**
- **Outcomes**
- **Program Budget**
- **Operating Budget**
- **Future Sustenance**
- **Fund Raising Plan**
- **Strategic Plan**
- **Donors/Supporters**

UNDERLYING QUESTIONS:

“WHO” QUESTIONS

(Page 9)

- **Who are you?**
- **Who are your clients?**
- **Who are your staff?**
- **Who are your volunteers?**
- **Who's on your Board?**
- **Who funds your programs?**
- **Who collaborates with you?**
- **Who are your successful clients?**

“WHAT” QUESTIONS

(Page 9)

- **What have you achieved?**
- **What do clients & community need?**
- **What assets does your program bring?**
- **What areas served?**
- **What population?**
- **What are your programs?**
- **What does your Strategic Plan say?**
- **What’s in your fund raising plan?**
- **What evidence of community support?**

“WHY” QUESTIONS

(Page 10)

- **Why are you unique?**
- **Why in the geographic areas you are?**
- **Why do clients need your services?**
- **Why have other funders supported?**
- **Why have you chosen to evaluate this way?**

“WHEN” QUESTIONS

(Page 10)

- **When do you provide services?**
- **When do you revise your budget?**
- **When does Board meet?**
- **When do you evaluate?**

“WHERE” QUESTIONS

(Page 10)

- **Where are you?**
- **Where do you provide services?**
- **Where are your clients from?**
- **Where do you get operating funds?**
- **Where do you get volunteers?**
- **Where do they fit into your programs?**

“HOW” QUESTIONS

(Page 11)

- **How do you know clients want and need your services?**
- **How many served? No. of hours?**
- **How much per client and per hour?**
- **How much - budget?**

PROGRAM SUSTENANCE



- More than money ...
- Internal capacity
- Strategic planning and implementation
- Financial stability
- Community partnerships
- Demonstrated value of what you do

MORE “HOW” QUESTIONS

- **How do you collaborate?**
- **How communities benefit?**
- **How sustain in future?**
- **Is this a short-term or long-term project?**
- **How many volunteers do you have?**

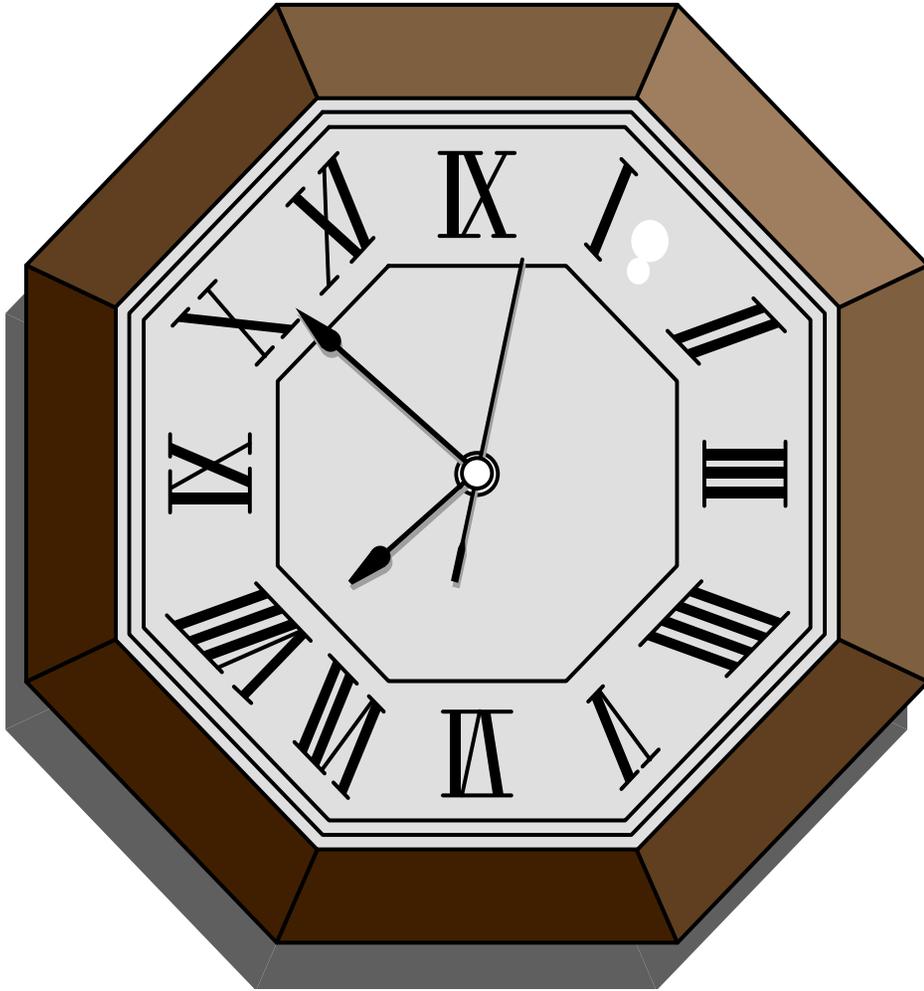
YOUR TEMPLATE IS JUST
LIKE A PUZZLE
(Page 12)



FIRST...START EARLY!!!

- **Set up a computer file**
- **Insert ALL required section headings**
- **Go over headings - insert all the basic questions you can think of for each heading/question**
- **Put yourself in funder's place and ask yourself what THEY are asking**

ALLOW TIME



- The best product has been reviewed and refined because you planned for review time before you started!
- **MUST** have it for superior, competitive requests

FUNDERS' QUESTIONS - **a reminder of some of them**

- **Mission Statement**
- **Program Description**
- **Needs Assessment**
- **Demographics**
- **Community Support**
- **History**
- **Collaborations**
- **Evaluations**
- **Outcomes**
- **Program Budget**
- **Operating Budget**
- **Future Sustenance**
- **Fund Raising Plan**
- **Strategic Plan**
- **Donors/Supporters**

QUESTIONS TO ASK AS YOU DRAFT PROPOSAL

- 1. WHO?
- 2. WHAT?
- 3. WHY?
- 4. WHEN?
- 5. WHERE?
- 6. HOW?



YOUR TEMPLATE – GIVE THEM **WHAT THEY WANT**

- **Page 12**
- **Use correct format, font, etc.**
- **Show page limitations**
- **Insert points allotted from selection criteria/scoring**
- **Show where referenced in guidelines or Request for Proposals (RFP)**

CONTINUE YOUR TEMPLATE

- **Format the cover sheet if needed**
- **Print clean copies of all forms**
- **Print an extra copy of each to use**



HEADING: ORGANIZATION'S MISSION AND GOALS

- **Think of all the questions that fit here**
- **Get help in making sure they all get answered from several points of view**



PROJECT NEED, POPULATION & LOCATION (Page 13)

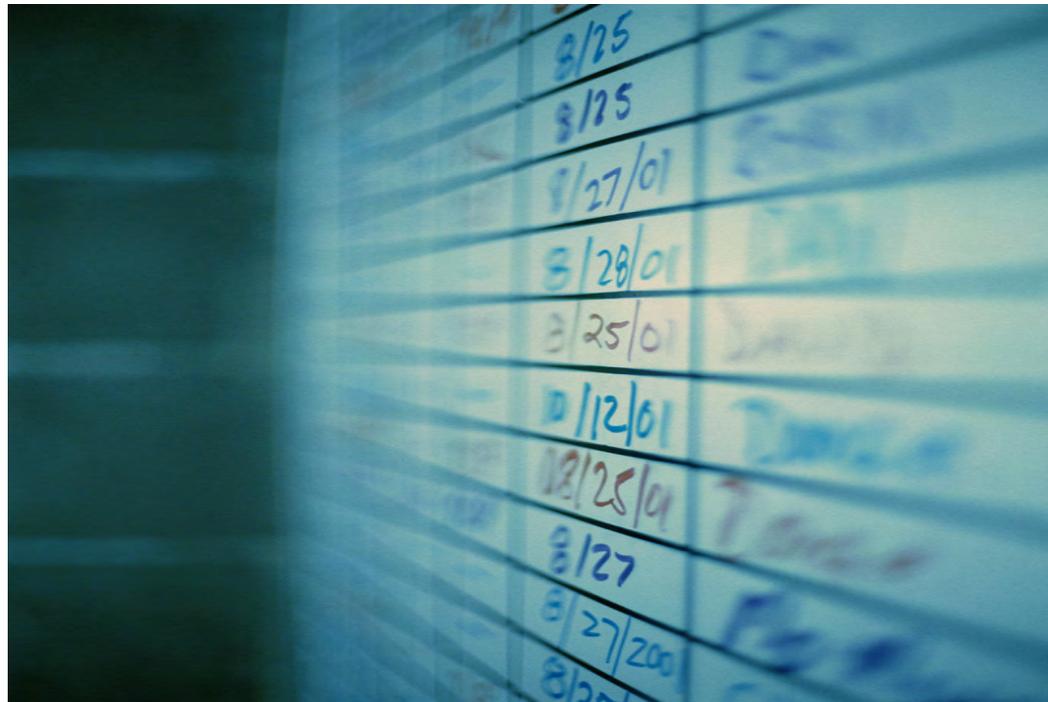
- **WHY** is this project needed?
- **WHAT** evidence do you have?
- **WHO** are you targeting?
- **WHAT'S** their ethnicity
- **WHAT's** their income level?
- **WHERE** will you provide services?

PROJECT DESCRIPTION/ ACTION PLAN (Page 13)

- **WHAT services will you provide?**
- **HOW did you involve clients in the plan?**
- **HOW MANY will be served?**
- **WHAT specific activities?**
- **WHAT will you do about transportation?**

HEADING: PROJECT DESCRIPTION/ACTION PLAN

- **WHAT** partnerships will assist?
- **WHEN** will services begin & end?



HEADING: PROJECT **OUTCOMES & IMPACT (P.14)**

- What **QUANTITATIVE (SHORT-TERM)** results do you expect?
- **CITE** numbers of clients and hours of service, numbers of workshops, etc.



HEADING: PROJECT OUTCOMES & IMPACT

- **WHAT QUALITATIVE (LONG-TERM) results do you expect?**
- **HOW will clients' lives change?**
- **WHAT does success look like?**



AND NOW ...

- **CONTINUE THE SAME WAY WITH ALL OF THE OTHER HEADINGS / QUESTIONS ... ask the WHO, WHAT, WHY, WHEN, WHERE & HOW questions for each one to be sure you'll cover everything in your answers**

HOW EVALUATED?

(Page 15)

- **HOW** will you evaluate programs?
- **HOW** will you change lives?
- **CAN YOU/DO YOU** measure short-term **AND** long-term outcomes?



HOW EVALUATED?

- **Outcomes clearly defined, achievable and measurable**
- **Short-term AND long-term**
- **PROCESS AND OUTCOME**

PROCESS vs. OUTCOME

(Page 15)

- PROCESS

- What YOU will do **DURING** the grant period

↑ Quantitative

↑ Short-term

- OUTCOME

- What CLIENTS will do **AFTER** service delivery

↑ Qualitative

↑ Long-term

GOALS

**Broad statements of
what your program
will accomplish**



OBJECTIVES (Page 15)

- **MEASURABLE STEPS** to be used as guidelines for evaluation

ANSWERS THESE QUESTIONS:

- **What are you going to do?**
- **How will you do it?**
- **By when will you do it?**
- **How much change do you expect?**

SAMPLE OBJECTIVES

(Page 16)

- **By December 31, 2008, to provide 100 clients with emergency medical care**
- **By December 31 2008, to provide 80% of these clients (a total of 80), with emergency housing**
- **By December 31, 2008, to provide 50% of these clients (a total of 50) with mental health screenings**

WHAT FUNDERS SAY ABOUT WHY IT'S **CRITICAL**

- **The success barometer in charitable giving rises exponentially when grantees show they have simple, but sufficient, assessment tools in place.**

Dorothy Meehan, Vice President

Sierra Health Foundation, Sacramento, CA

BEGIN BOILERPLATE

- **Give staff headed pages with standard questions (page 17 - 19)**
- **Get input from everyone**
- **BEST OF ALL, interview them all yourself**
- **Compile the whole argument piece by piece, question by question**

THE WORK PLAN (P.20)

- **START EARLY !!!**
- **Keeps everyone on task**
- **List every single thing that has to be done**
- **List all MOUs needed**
- **List each section needed**
- **Assign role and deadline for each**
- **Allow review time**

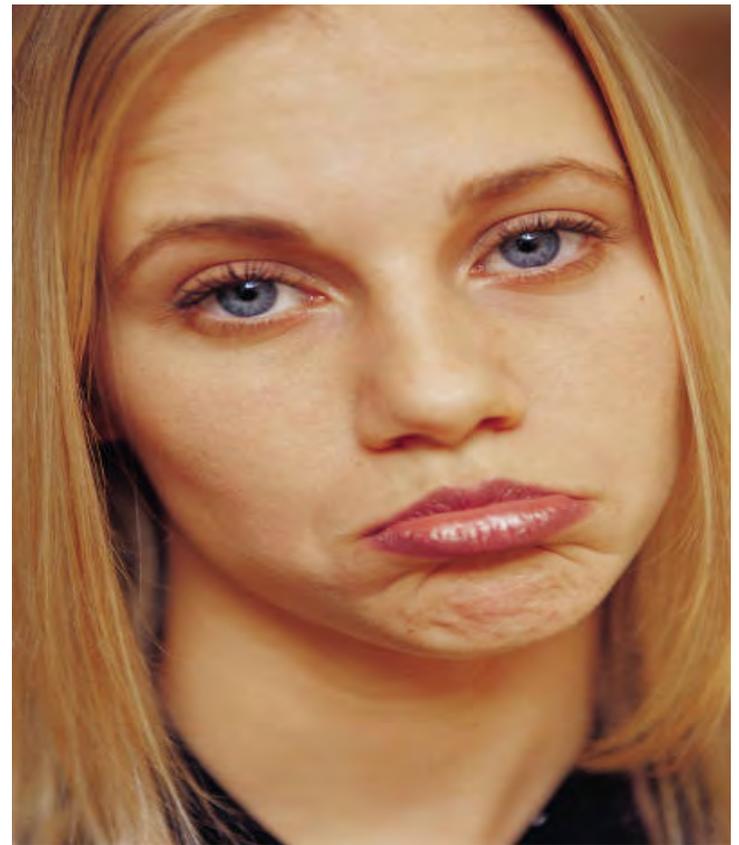
PROGRAM BUDGET

(Page 21)

- **Include ALL costs, including supervision, management, overhead**
- **Place a value on volunteer time**
- **Create a separate budget for EACH of your programs**
- **You also need an Organizational Budget that includes everything**

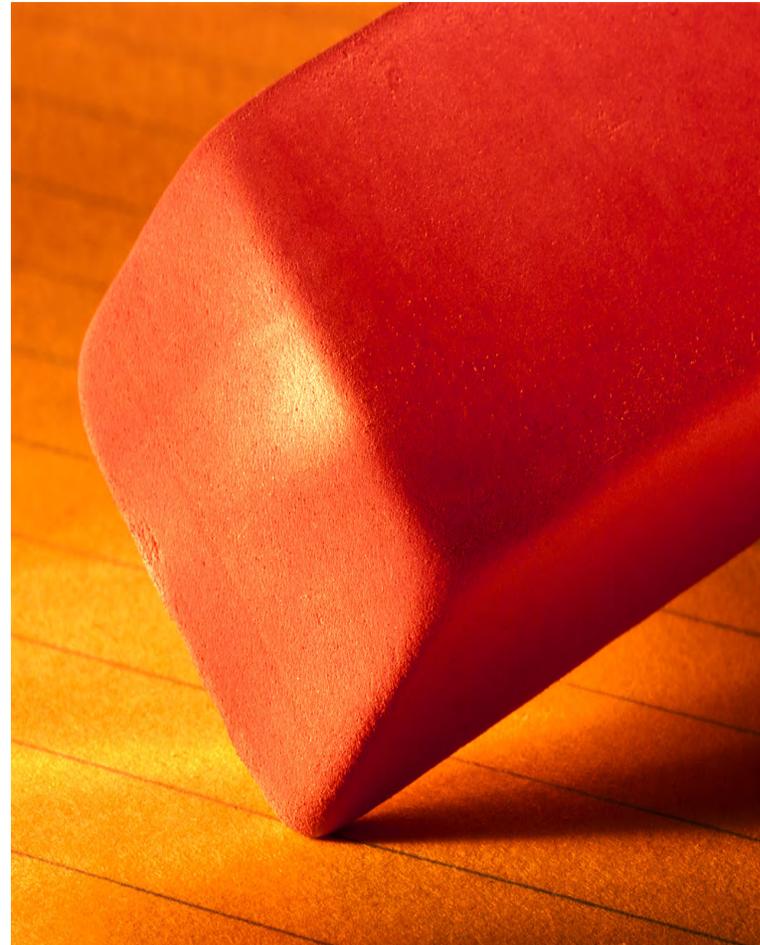
MOST COMMON REASON FOR REJECTION (Page 24)

- **FAILURE TO FOLLOW THE DIRECTIONS**



MOST COMMON ERRORS

- **NOT ENOUGH
DETAIL**
- **Weak impacts**
- **Story not
compelling**
- **Need not explained**
- **What difference will
the \$ make?**





- **No signatures**
- **Missing pieces**
- **No budget narrative**
- **Inadequate insurance**
- **HOW will lives change?**

HOW TO AVOID THE COMMON ERRORS (Page 25)

- **DID I SAY ‘START EARLY?’ !!**
- **Truly, it’s one of the best ways to stay relatively sane.**



HOW TO AVOID THE COMMON **ERRORS**

- **DO complete as much as you can of all cover sheets, certifications, etc. at the very beginning of the process**
- **DO use a team approach!**
- **DO meet with Executive Director, PROGRAM STAFF, partners to get buy-in and help**

HOW TO AVOID THE COMMON **ERRORS**

- **DO begin very early with board resolutions, memoranda of understanding and letters of endorsement – they take time.**
- **DO allow review time – CRITICAL to producing a superior proposal – honestly**

HOW TO AVOID THE COMMON ERRORS

- **DON'T waste time just THINKING about it – START NOW!**
- **DON'T FORGET that CONTINUOUS PAGE NUMBERING on paper submissions can almost always only be done at the end**
 - allow time



Summary of HOW YOU CAN STAY RELATIVELY SANE! (Not in Resource Guide)

KEY ACTIONS:

- **START EARLY** 😊
- **Have boilerplate ready**
- **Have a Work Plan**
- **Have a team ready**
- **Ask and answer ALL the basic questions**
- **Plan for regular evaluation**
- **Have someone from outside read**
- **BREATHE**

IT'S SO GOOD TO BE DONE!



FUTURE RESOURCES

(Page 27 and 28)

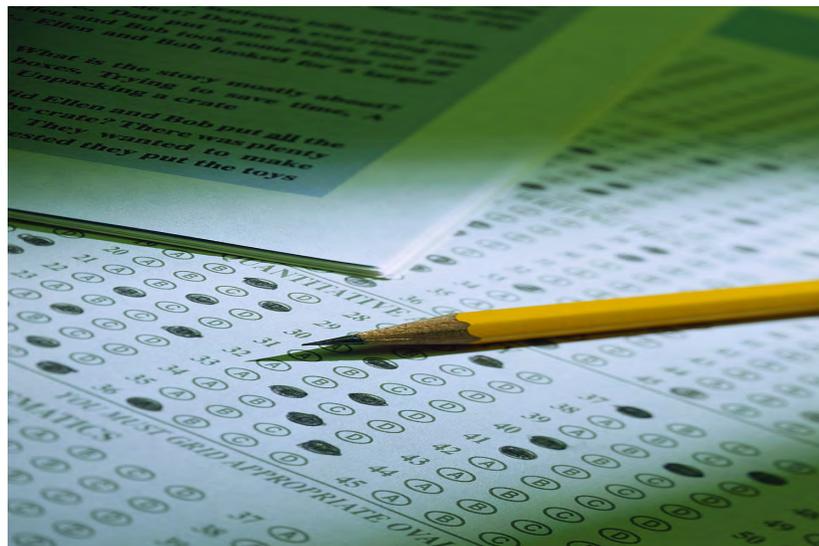


- Form partnerships
- Use websites:
- Foundation Centers
- Corporate marketing money - give them some free PR
- Guidestart, Nat'l Center for Charitable Statistics

WRAPPING UP ... (Page 29)

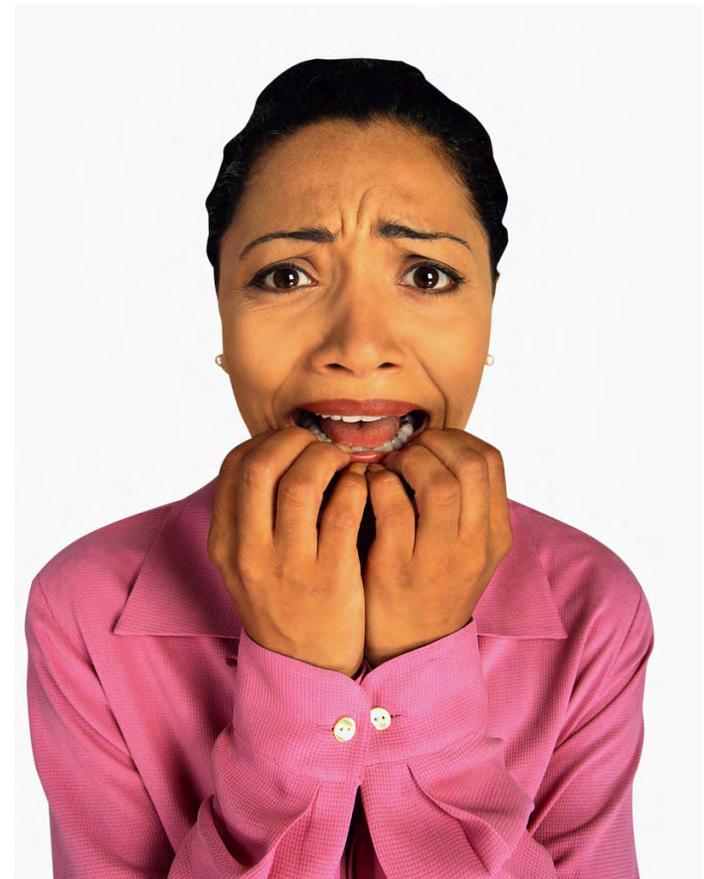
I hope you've learned:

- What funders are looking for
- How to ask , “What are their “questions within the questions?””



AVOID PANIC

- **AVOID PANIC**
- **START EARLY SO YOU'LL HAVE PLENTY OF TIME**
- **GET HELP**



BEGIN BOILERPLATE NOW



REMEMBER ...

- Set up a template
- Work on the Evaluation section
- Keep your team to a schedule that includes review time
- Create Program Budgets
- Avoid those common errors
- Stand out from the pack
- BREATHE
- Keep moving ahead
- Send out MORE

We think of funders as:

- **Large bodies of money surrounded by people who want some 😊**
- **GO GET SOME**

