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The Art of the Ask: Designing Fundable Projects and Writing Powerful Grant Narratives for Nonprofits

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Welcome and Introductions

Michael Paddock:

Hello everyone, and thanks for joining us for The Art of the Ask: Designing Fundable Projects and Writing Powerful Grant Narratives for Nonprofits. I'm Michael Paddock, CEO of Grants Office, and I want to welcome you to today's session. A really fundamental session — we'll be talking today about developing a fundable project and ultimately developing a competitive grant narrative for your application. Very happy you're here with us today. I want to very much thank Ingram Micro for sponsoring today's session and making it possible for us to bring you this information today.

Housekeeping

Before we get started, we've got a couple of housekeeping items for you. As many of you know, you can listen hands-free over your computer speakers or headphones. There's no need to dial in, but if you do become disconnected, you can go to the audio and video menu at the top of your screen. If you don't see it, look for the show menu bar button there. Go to the audio and video menu at the top of your screen to find alternative ways to connect to the audio portion of today's session.

Today's session is being recorded, and the replay will be available at essentially the same place where you registered for today's session. Kate has already sent a note through the chat stating that the session is being recorded and the replay will be available for download by the close of business today.

You can ask questions at any time using the question and answer interface at the bottom right-hand corner of your screen. If you don't see the question and answer interface, click on the little three dots at the bottom right corner of your screen to find the Q&A interface there. Feel free to send in as many questions as you'd like, and we'll get to as many as we can before the end of the hour.

Today's Agenda

What are we going to be talking about today? We have a great presentation from Think Stack IT discussing cybersecurity and cloud solutions. Then we'll jump right in with developing a grant-ready project, talk about selecting grants strategically, and then a very exciting real-time activity for us all —

writing a proposal in real time. Very much looking forward to that. And then we'll hear about Ingram Micro grant services as well before we get to your questions.

I'm joined by a great group of panelists today. We've got Shawn Flaherty, Vice President of Business Development for Think Stack; Emily Nolan, Senior Program Manager for Grants at Ingram Micro; Sandy Trowbridge, Grants Development Associate here at Grants Office; and Amber Walker, also a Grants Development Associate here at Grants Office. So in other words, everyone you need to capture all the things you've come to hear today. With that, I'm going to turn it over to Shawn Flaherty to get us started talking to us a little bit about Think Stack and what they have to offer, and some exciting announcements that they have as well.

About Think Stack

Shawn Flaherty:
Thanks, Mike, and thanks to everyone out there for joining today. I'll try to keep my portion brief. I know you're here to learn about funding opportunities. The purpose for my presence is to offer up our team at Think Stack as a resource for you, if you're ever looking for a trusted partner that specializes in serving nonprofits with their technology efforts.

Personal Background

A little bit about me before we get in — why am I here today? I'm from Baltimore, Maryland, and for those of y'all that are familiar, every city has its problems. We probably have more than most. When I moved back after business school, I realized very quickly that the disparity of wealth was something that just didn't sit right with me. So I went to work for a nonprofit called Living Classrooms Foundation here in Baltimore, and I was there for a little over six years. What I saw firsthand was that the impact a focused organization can have, not only on the community but on the individuals that it serves, is incredible. So I want to start just by thanking all of you for the hard and important work that you're doing to serve your members and your cities and your organizations. You're making the world a better place.

Think Stack's Mission and Team

Think Stack is a mission-driven IT company, and our mission is to support mission-driven organizations like you. We've been around for a while. Our team has been steadily growing over the years. We entered into a strategic partnership with another managed service provider called Network Coverage at the end of last year, so we now have over 350 people on staff. These are empathetic technology experts that are familiar with the challenges that your organizations are facing as nonprofits, both from a budget perspective but also from a technology and staffing perspective. There's a whole lot of insights that we can share based on our experiences.

We're here to help you. If you take nothing else away from what I share today, it's that our team is ready and willing to be a trusted resource — even if you're just looking for a sounding board to kick ideas around with. At the end of the day, what we would love to do is find a way to help you bring your projects to life, to realize that through implementation, configuration, and ultimately ongoing management if you need it. But we're also a resource as you plan for your grant applications. If you need support in that regard, there are probably ways we can help.

The map speaks for itself, but the point of that visual is simply that we're all over the country, both from a team perspective and also our clients. So don't feel constrained based on your location. We serve folks all over the United States.

Think Stack and AWS Grant Opportunity

I'm going to put a link into the chat here. I'm not going to belabor this point, but I want you to see the type of things that we are actively trying to do to be a good resource — to walk it like we talk it, if you will. We put together this grant opportunity for credit unions and nonprofits. It is in partnership with AWS — it's $100,000. $50,000 of that comes from Think Stack in the form of advisory services, assessments — really, you name it, we're including it. The other $50,000 comes in the form of credits from AWS. So if you're thinking about a cloud migration, upgrading your cybersecurity, modernizing your infrastructure, things like that would qualify. There will be one grand prize winner, but we're also going to have a large number of consolation prizes.

What I've found in my personal experience and in my time at Think Stack is that big technology changes within nonprofit organizations are most successful when we take measured steps together. There's no point in rushing something. It's all about making sure that the path that you've laid out for your technology is married to your growth goals and is self-aware in that these changes should be making the lives of your team easier. They should be making you sleep better at night, and ultimately they should ensure that member data that you have is safer than it's ever been before. And you can't do that overnight, and you shouldn't do it overnight.

Our approach is one where we lean on our experience to help nonprofit organizations create alignment between the board, the C-suite, and the IT team, so that you're marching together, rowing in the same direction for the same reasons. That type of alignment creates strong communication pathways and ultimately an end state that is hopefully exceeding your expectations with the ways that you're serving your members and your communities. I put the link in the chat there, and I'd encourage you all to take a look, apply. I will tell you — it says it right there in the why-apply section — but we've made this as easy as it can be. It's two to five minutes at most for you to throw your hat in the ring, and worst-case scenario is you're going to get connected with our team as a resource, even if you don't win, and odds are we can find a way to be helpful.

How Think Stack Helps Nonprofits

Beyond that, for other grant opportunities that you may be pursuing, I wanted you to have a sense of how we help nonprofits. At our root and core, we're a managed IT services company. In some cases we are the IT team for a nonprofit. In others, we provide more of a co-managed approach where we complement the internal IT team. We specialize in cybersecurity. We provide advisory services for things like long-term strategic IT planning and even organizational planning.

As you factor in your future growth goals, technology plans need to be aligned, and we can really provide a lot of value there. I mentioned cloud earlier — we are cloud agnostic, so it's important to note: yes, we partnered with AWS on our grant, but we are the two-time global nonprofit partner of the year award winner with AWS. We're also a Microsoft CSP and a Gold Partner, so we have a full Azure team available for those types of efforts as well. Depending on which lane you're in, compliance may or may not be a major concern for you. Ultimately it's usually paired with cybersecurity, and we've got a lot of different ways that we can help there.

Lastly, everyone's talking a lot about AI these days. Sure, we can help you design solutions. You're probably already using it in some shape or form. When you think about the guardrails that you might want to put in place from a policy and procedure standpoint, we have a lot of advice we can provide there. But beyond that, if you're looking into things like generative AI and automation to streamline your business and the way that you're serving your members, we can help there too.

At a high level, we're going to help make sure that your member data is secure. We're going to help you modernize your tech stack. We can provide 24/7 support, and ultimately it is our mission to make sure that we're supporting your missions and you can focus on the important stuff — serving your members, serving your communities, not worrying about your IT.

Cloud and Cybersecurity Solutions

Here's a little bit more about how we help from an infrastructure perspective as it relates to cloud. Again, I can't say this enough — some of you may be more advanced in terms of your cloud conversations, and you might already have a plan. If that's the case, amazing. Let's work together and we can help you supercharge it. We can unlock credits to offset costs, we can help you with grants. If you're earlier in that planning process, we can help you lay a foundation and build alignment.

We've intentionally phased these efforts so that, regardless of whether it's cloud, cybersecurity, managed IT, whatever it is — they should never be disruptive to your operations. They should only enhance them. Having a partner that understands the nonprofit space and understands technology deeply will help you avoid those pitfalls and just take full advantage of the potential.

A lot of folks lately have been concerned about things like disaster recovery and backup. Business continuity is obviously always on all of our minds, and that comes through the lens of natural disasters but also cyberattacks. Unfortunately, we've seen a major uptick in nonprofit organizations being targeted by bad actors, and I'd be remiss not to tell you that some of the folks we have on our team have varied and extremely impressive backgrounds. Our VP of Cybersecurity and Risk served 20 years active duty in the Air Force, finished out her career as CISO for US Cyber Command for the Air Force, and now she serves our nonprofit clients in that capacity. That kind of battle-tested perspective of offensive and defensive cyber operations against the bad actors that are now turning their attention to nonprofits — which is awful, but it's just a harsh reality of where we are — we have the resources to help you navigate that and the solutions that we can offer at price points that are built around the constraints we understand exist in the nonprofit world, to make those a reality for you and to keep your members safe.

Client Stories

In these slides I highlighted a couple of different client stories and how we help them transform. Solarity Credit Union specifically — they wanted to account for a large amount of growth in their membership and also a more flexible environment so that they could innovate. We helped to get them into the cloud, focused on security, ultimately migrated them, and provided ongoing management. So now they're fully redundant in the cloud. They have their disaster recovery set up, and we're there to help every step along the way. We also continue to monitor and modernize and optimize their cloud spend so that the credit union itself is minimizing spend and putting those dollars toward serving its members.

The next is IES Abroad. They're a nonprofit educational organization based out of Chicago. For these folks, they had a very, very strong internal IT team, but their lack of experience in the cloud led them to look for a partner that could help them transition to the cloud. We started with an assessment — baseline, let's understand your environment, but more importantly, let's understand your people, your team, your strengths, and where you're looking to fill gaps. Our model is people before technology. Before we make any recommendations, we want to familiarize ourselves with the mission of the organization, the dynamics of the internal team, and then build a plan around the people that make sure the technology is serving them and not the other way around. Ultimately, we've built a really tight relationship with IES Abroad, and they're fully in the cloud now and starting to do some really neat things with it. I'm happy to answer questions about that later on.

With that, we've got a bunch of different ways we can be helpful here. I'd encourage you to check out the grant, apply if you're interested. If there are any other technology-related initiatives that you're planning on or even just kicking around with your teams and you need a trusted group to chat with and help you understand how to make it a reality, we're here to help. My contact information is there, and I really appreciate everyone's time. I'll end just by saying thank you again for the important work that

you're doing to make this world a better place. I personally am very grateful, and our team at Think Stack feels the same way. Thanks for having me today.

Michael Paddock:
Thanks very much, Shawn. Great information. If you're interested in the grant that Shawn was talking about, that's administered through Think Stack in partnership with AWS — Shawn has put the contact information into the chat, so you can feel free to check it out there.

Developing a Grant-Ready Project

Michael Paddock:
We're going to move on and pass the ball to Sandy Trowbridge and Amber Walker to talk to us about something that I think will be directly applicable for everyone on the call today — developing a fundable project, and then developing a competitive proposal. So let's start with Sandy.

Sandy Trowbridge:
Thank you, Michael. When getting started on your grant-seeking journey, it's tempting to want to go ahead and submit applications to every open grant, thinking that this will improve your chances of award. But what we have found in practice is the grant-seeking process is most effective when prioritizing the development of a grant-ready project even before identifying a specific grant opportunity to pursue. This approach enables you to be more strategic in your grant-seeking efforts and not waste time applying to grant opportunities that are not a good fit.

This first section is going to cover everything that we want to be thinking about when developing a grant-ready project, detailing five actionable steps that we can take to ensure that the project we're considering undertaking will ultimately be grant-fundable. Then I'll spend some time highlighting how we can find and select specific best-fit grants to apply to, before then passing it over to Amber to put everything that I covered into practice as she applies these concepts to development of an example grant application.

Crafting Your Needs Statement

When working to develop a grant-ready project, we recommend starting first with crafting your needs statement. The goal of a needs statement is to confirm that a very real and urgent need exists that, should you be awarded funding, your proposed project will help meet. Being able to clearly demonstrate this need greatly improves the likelihood of mission-driven grant funders wanting to buy into your proposed solution. It's not enough to just strike an emotional chord in your needs statement — you also need to back up what you're saying with data. We find that funders really want to see detailed facts in addition to stories. This data will lessen the likelihood of funders questioning the urgency of the issues that you're aiming to address and just improve the likelihood of getting your project funded.

Consider utilizing tools such as the United States Census Bureau, which presents information on things like total population, employment rate, and median household income across different regions. Think also about any surveys, articles, or reports that you can directly cite in your needs statement to further paint a compelling picture of your need. And be sure to only include data that's relevant and contextualized. Sometimes I review needs statements that are jam-packed with data, but some of which is not relevant to the specific need in question. Just make sure that all data included is being used in direct service of your story. You really just want funders to understand why they should fund your project over other applicants and what makes your need particularly unique and urgent. If you find these steps to be difficult, then it's definitely worth reconsidering your project approach, as a specific data-driven community need should really serve as the foundation of your broader project.

To aid in crafting your needs statement, ask yourself some questions: What gaps do you have in fulfilling your mission-driven goals currently? What data do you have that can help illustrate this need? What are you going to do to meet this need? And who is currently impacted by the need and who will benefit from the solution? Jotting down answers to these questions at this stage will give you confidence that the project that you're about to build out is one that mission-driven grant funders will be interested in supporting.

Outlining Your Project Plan

Having demonstrated the need for your project through drafting a comprehensive needs statement, now it's time to think through how you plan to carry out your project. This is an opportunity to move from a high-level idea to a more realistic and actionable project plan. This information can all be compiled in a standard project Gantt chart, like the simplified version you see on the screen here, or simply be discussed in narrative form — really whatever's most helpful to you and your team at this stage of the process.

The goal is really just to take that broader concept and think through how you can make it actionable. Many grant applications I review don't go quite far enough in detailing what they actually plan to do with the funding if awarded. Funders want to know that you have thoroughly thought things through, which ultimately gives them confidence that their funds will be put to good use. In the project development stage, I always recommend that teams take the time to detail the specific actions that they plan to take, who will be doing that action, within what time frame, and with what output. It enables you to dive in deep and confirm that your project's realistic and actionable. This planning process also necessitates consideration of who will be on the project team, both internally and externally, so you want to think through who will best support the success of your project and get them looped in early on.

Documenting Your Project Goals

Next it's helpful to formally document your project goals. When drafting your goals, it's important to ensure that each adheres to the SMART goal-setting approach, which stands for Specific, Measurable, Actionable, Realistic, and Time-bound. This is really one of the most important tools for planning a successful grant project. Grant funders love a good SMART goal because it shows that you have a well-thought-out and actionable plan in place to address your specific project need within a specific time frame.

For smaller projects, we always recommend drafting one to two goals, and for larger projects, three or more. Regardless of the size of your project, each goal should connect back to a project activity, and every activity should connect back to a goal, so there's that clear alignment between what you want to achieve and what you'll be doing to achieve it. Ask yourself the questions on the screen as you draft your SMART goals, and make sure that you have all your bases covered in that sense.

Identifying Required Resources

Once you've thought through your project plan and goals, it's helpful to think through what resources will be required to implement the project. Start thinking through what personnel, travel, equipment, supplies, and other direct costs will be required. Drafting a quick budget and budget justification here is helpful and gives you a better understanding of the scope of the funding that you're looking for. It allows you to consider whether it will be possible to scale up or scale down the project depending on what funding levels are ultimately available.

Telling the Complete Story

Continue thinking through the various project components and drill further in on the who, what, where, when, why, and how of your project. We've talked about a lot of these individual components, and now it's time to combine it all into the complete story of your project and share the alignment between each piece. The reality is that funders may not be aware of the unique challenges that your organization faces, so taking the time to draft a compelling story about your identified need and the resulting project that you wish to support will go a long way in building understanding between you and the funder.

Taking the step now, even before you identify a specific grant, puts you a few steps ahead when it comes time to draft your proposal narrative, which is really helpful because a lot of grant opportunities arise with short application windows. In addition, it allows you to have your elevator pitch if you do have opportunity to speak with the funder or a potential partner before application. Approach this as a brainstorming exercise — ask yourself the questions you see on the screen here, and build out your project in narrative form. It gives you a chance to bring together all the work that you've already done in drafting your needs statement, outlining your project plan, documenting your project goals, and confirming your required resources, ensuring alignment between each of those project areas.

Finding and Selecting Grants Strategically

Sandy Trowbridge:
Now that we have an understanding of how to go about developing a grant-ready project, let's consider a few best practices for what comes next: finding and selecting grants strategically.

Sources of Grant Funding

When first considering your options for grant funding, it is helpful to understand where this funding comes from. Grants really come from three major sources: federal, state, and foundation. There are distinct advantages and disadvantages to each which are helpful to understand when determining which source makes the most sense for you based on your proposed project and timelines.

Federal grants are generally the largest. Since applicants across the nation can apply, they can be pretty competitive, and their proposal requirements can be lengthy and time-consuming. But because of the abundance of opportunities and the substantial amount of grant money available through them, it does make them an appealing option. State grants operate in many ways similar to federal grants. The average award size is a bit smaller compared to federal grants, but oftentimes states are a bit easier to communicate with. They have a smaller competition pool because they're just limited to the state, so that makes them an attractive option as well. Foundation grants are provided by private, corporate, or community foundations, and are typically smaller than federal or state grants. They have a high focus on supporting community-based projects. The application mode for foundations tends to be the lightest in terms of complexity and time, with a quicker decision and funding timeline as well. For your local foundations, you also have a much smaller competition pool, sometimes limited to a specific county or even neighborhood, which is attractive as well.

Where to Source Grants

On the screen you'll see some examples of where to source grants across the federal, state, and private funding spheres. There are 26 federal grant-making agencies in all. Many of these federal agencies also have state-level counterparts. Then of course we have foundations, which number in the many thousands of options.

Grants.gov is going to be your one-stop shop for federal grants. Through Grants.gov, you can search for grants across all 26 federal funding agencies. You can also look for grants directly on agency websites, be that a federal agency website like the National Science Foundation or a state agency website like the New Jersey Department of Education. If the agency offers grants, the website will have a section dedicated to grants where you can search out opportunities, find points of contact, and look at past awardees.

With regards to sourcing foundations, Foundation Center is a great choice. You may be able to access it for free through a local library. Otherwise you'll have to pay for a license, but it's a database where you can search for over 100,000 foundations and tax forms. While it doesn't sound terribly exciting, tax forms are an important resource for looking for foundations, because a lot of foundations don't maintain a website. These forms, known as Form 990s, give you insight into what type of organizations the funders previously funded, how they prefer to be contacted, and are a tool to be used to see if they would be a good fit foundation or not. You can also search 990s directly on the IRS website, search board members on GuideStar if you want to see if you have existing relationships with the foundation funders. And then of course, Google — Google is your friend if you're not sure where to start. One quick tip is just to make sure you sign up for email listservs for relevant agencies so that you're notified when new current opportunities open up for application.

Technology-Friendly Grants

When you look at all of the grants from the federal, state, and private levels, you'll find two different kinds of grants when it comes to tech. Although there are technology-focused grants, the majority of what we call technology-friendly grants are grants where technology is an allowable expense as long as it's part of a larger comprehensive project. For example, say the funder's looking to enhance public health and your local nonprofit is looking to fund a cloud-based referral platform — tying back to Amber's section ahead — really finding a way to highlight how this technology will result in social benefits, such as community members being able to access services when they're needed most. Really working to clearly connect the dots between the funder's mission and your need, emphasizing the overall social benefits of your project throughout, versus focusing solely on the specific tech that you're looking to procure.

Now that we understand how certain types of grants support tech solutions, how can we really determine if a specific grant of interest is indeed technology-friendly? You want to give the application guidance a thorough read. When considering the tech question in particular, you can just flip right to the budget section, where it typically explicitly states the allowable and unallowable costs. For guidance that's less explicit, you can also look at the program's funding priorities. If you have a specific project in mind that can utilize tech, it's key that you make sure your project's goals and mission are in alignment with what the grant program's all about. So ask yourself if the tech solutions that you're looking to purchase and implement with grant funding address the overall social benefits of the program. Another way to check is just by looking at projects that have been funded through the program in the past. A lot of agencies publish some right information of funded projects, which may note in more detail what the grant opportunity is most likely to fund. You'll want to look at if the grant program has leveraged tech solutions in the past to fulfill its mission through a review of these past projects. And lastly, you can always just reach directly out to the grants program manager to ask.

Which Grants Are Worth Your Time?

Once you've identified a handful of potential technology-friendly grant programs, how do you know which one is the best fit and worth your time and energy applying to? Thankfully the fact that you've already done all of that prep work in building out your project will enable you to be more strategic at this selection stage. There are a few questions to consider when deciding which grants to pursue, such as eligibility requirements, funding priorities, and funder history. I won't read through each question individually, but I'll highlight just a few examples.

Think through how key team members read the application guidance and confirmed your organization is eligible. Does the opportunity align with your mission as well as your project-specific needs and goals? If awarded, do you have the expertise to implement the requirements in the application guidance? Just thinking through questions like these before you commit time and resources to the grant-seeking effort will give you confidence in proceeding, or make it clear that there might be better-fit opportunities out there. If your answers to these questions are all leading in a positive direction, when looking at a specific opportunity, the next step is the grant-writing stage of the process. I'm going to hand things over to Amber now to walk us through writing a grant proposal in real time, so that we can get a better sense of key proposal elements and other best practices to be keeping in mind. Amber, over to you.

Writing a Grant Proposal in Real Time

Amber Walker:
Hi, thanks Sandy and good afternoon, everybody. Before we dive in, I do want to come clean. Writing a grant proposal can take a week, two weeks, three work weeks. So unfortunately, I won't be able to keep you that long — or fortunately. But we are really going to dive into what that looks like in the next 30 minutes.

My goal for you is to leave feeling prepared, learning something new about the process, feeling motivated, and feeling confident to submit grant proposals. We're going to first dive into the common elements of a grant proposal. Every grant application is going to look slightly different. You can see here there's a lot of different components, and some combination or variation is most likely to be represented in a typical grant application.

The Executive Summary

We're going to dive into the executive summary first, which is essentially found at the beginning of the application. It's going to provide a high-level view of your proposal, and it's really meant to be an elevator pitch for your project. It's going to take a 20- to 30-page proposal and condense it into a one-page summary.

Before we can write an executive summary, we have to have a nonprofit and we have to have a project in mind to write about. So for the purpose of today, we're going to be working with a fictional organization called Maplewood Roots. We're going to be helping Maplewood Roots navigate the grant proposal process. As you can see, they're a nonprofit that's established and ready to seek out funding for their next project. Maplewood Roots has put in the work that Sandy outlined previously about getting ready to apply, and has utilized those funder prospecting tips to find Rochester Area Community Foundation, who happens to have an open grant that they want to apply to. And luckily for us, it's tech-friendly, so they are going to be basing their project on a cloud-based referral system.

The executive summary, as we mentioned, is found at the beginning of the application. We are going to highlight the fact that there are a lot of parallels to the rest of your proposal. This is the elevator pitch, so it's going to include things from your needs statement and the rest of the project narrative. The big thing to drive home is that you will want to be concise and cover some of these major points. But we won't necessarily get really deep in the weeds regarding data or quantifiable parts of your story. So we're going to focus on these three key points: the solution, the problem, and how your organization can help.

Stating the Problem

First, we're going to examine the problem. As you can see here, we have written a good statement and a better statement of the problem. This could be the first line to your whole proposal. It's your introduction to the funder, so you want to make it really strong. On the left you can see an okay statement. However, being your first impression, you want to let the funder know exactly and specifically the community you're talking about, so you want to be as clear as possible. By simply taking a couple of extra steps and including the specific community, you're really making it more clear to the funder who we are talking about.

Presenting the Solution

Once the problem is made clear, you should be ready with the solution. This is another example of a good and perfectly okay statement found on the left-hand side and a better statement. Perfectly fine is not convincing and is not competitive when you're submitting grant proposals. The statement on the right goes one step further and says directly and exactly what the solution does — it will connect a network of local organizations and will be inclusive and accessible to Maplewood residents. This really goes that one step deeper. Then: a referral system will be established. Platform software, as you can see highlighted, will be important to keep in mind as we go through this proposal development, because it's a common thread to a lot of different aspects throughout this process.

Highlighting Your Organization's Capability

Now that we've named the problem and the solution, next you'll want to outline why your organization is best suited to implement the solution. You can see here a perfectly good and fine statement on the left. It's not wrong, but the statement on the right is meant to demonstrate how easily you can improve from perfectly good and fine, just by using small changes, and really create a strong and convincing statement. Using quantifiable data really brings life to our statement. On the left, they've been around for a long time, but on the right, it's been seven years with 100 local organizations. It paints a better picture, it gives a better flow, and it gives the reviewer a better sense of who you are and the credibility behind what you're doing.

Finally, once you've established all of those, you're going to thread it together. I'm not going to read this all to you, but it is taking those last three points and weaving them together into a long-form statement. This is the elevator pitch to your proposal. You want to be really direct, use clear examples and goals, and really highlight through specific statements what it is you're trying to accomplish with your project.

The Needs Statement

Once we have completed the executive summary, we're going to examine the needs statement. The needs statement is the section that kind of gets to the heart of the initiative but also the beneficiaries of the project. As Sandy covered, it's really going to relay the urgency of the need, of the project, of your organization through data and the story. It's okay to pull population data and information, and it's encouraged to pull information about the region and the community, if it makes your case more compelling.

One of the first things I often recommend to grant writers as they're developing their needs statement is to get on the Census website. This provides really in-depth analysis of your community, and you can find information that is going to be relevant and also complementary to your project — things like education level, employment rates, household makeups. If you're serving a senior population, what percentage of the population is considered an older adult. Things that are going to be relevant and complementary are super important to pull from this website.

Once you begin pulling this information out, you're going to want to be able to convey it to the reviewer. When you're thinking about presenting these needs, you'll want to not only sprinkle in how your organization fits into this picture — as you can see in the economic slide, where we throw in a dire need for increasing services like those provided by Maplewood Roots — but you're also going to want to contextualize as well. You can look at economics or housing as an example of that. It doesn't really mean anything to say over 16 percent of residents in Monroe County are unemployed if you have no other contextualized information to put up against it. So compared to 7 percent statewide is far more

representative of the big picture and shows that it's double the rate of the rest of the state, and really drives home that the need is really urgent in your area.

Another way to contextualize it may be: residents in Maplewood are experiencing rates of homelessness at three times the rest of the state. If you're including a lot of data, you'll want to mix it up, but you'll want to keep contextualizing these data points so that the reviewer has a frame of reference. They may not be from your area — it might be a regional foundation, they may have no idea about your community. So putting things into perspective will be very helpful to them as they're assessing your need. As we mentioned previously, you may want to expand past the Census data. Hospitals and health systems will sometimes have community health needs assessments. Chamber of Commerce commonly will provide population data on their city or their area. Sometimes community foundations as well. You might want to research and dig around a little bit on the internet, but just make sure that it's relevant to your project and from a reputable source.

Once you have pulled all these data points together, then you're going to weave it into a narrative or a long-form answer. I am not going to read to you word for word this narrative answer, but you can see points from the slide above. That's where we're talking about over 16 percent of residents compared to 7 percent statewide. But we've also weaved in the closing statements that really brings it all together and talks about not only the data points painting the big picture of the community, but also exactly and precisely how Maplewood Roots is addressing that and how it relates to those data points.

The Project Narrative

Once we have completed the needs statement, we're going to jump into the project narrative. This is going to look different for every grant you apply for, but it ultimately can be boiled down to: what questions are the funders asking? This can include goals and outcomes and objectives, as well as longer-form text-based questions like, describe your project. They may have limitations on word counts or character counts. The order of questions won't necessarily follow a particular template. So for today's application, we're going to be examining what the goals, outcomes, and objectives section will look like, in addition to some longer-form application questions.

Goals, Outcomes, and Objectives

When we're looking at the goals, outcomes, and objectives, this is really a callback to the information that you developed with your SMART goals. When you're planning, it is really, really important to actually write out your goals as SMART — Specific, Measurable, Actionable, Realistic, and Time-bound. But that information in practice is often asked to be presented in a different format. I have not seen an application that says: tell me your SMART goal and list all those characteristics. In practice, it's looking a lot more like a goal, an objective, or an outcome.

For the next few slides, again, we're going to weave back into how we can strengthen our language by making minimal changes, and it really makes your statements stronger. You can see here that on the left we have highlighted “improved onboarding and support,” and that's perfectly fine and good. But on the right we just go one step further and say: the referral system is going to enable the organization to streamline onboarding processes. It just gives a clearer picture. It's essentially saying the same thing, but it gives the reviewer a window into your process. We're going to follow a similar path for objectives and outcomes, looking at this high-level way to increase your writing and make it more forward-thinking and more clear to your funders.

One of the most important things to be able to relay to a reviewer is that you're going to be a good steward of the funds that they give to you. By going that extra step of explaining a little bit more of your processes, that is exactly what you're doing. Finally, I'm going to highlight the outcomes as well, and we're looking at a similar type of pattern, where we're not only just anticipating ongoing changes — we are looking to increase the number of participants by 20 percent by December 2025 and an additional 25 percent by June 2026. Don't leave things up to interpretation. The reviewer is going to walk away from the right-side statement knowing exactly what you intend to do, and they're going to walk away from the left-side statement with some open-ended questions or assumptions. You really want to provide that reviewer the opportunity to walk away with a very clear picture.

Finally, bringing back to the point I made at the beginning of this section, funders can choose to request information in any format they want. The goals, objectives, and outcomes portion of the narrative can easily be requested as a long-form narrative written out, and it is just as easily requested as an attachment with a form that they provide. Don't get tricked up if the information is not asked in the way you're expecting, because you've done all this pre-planning — you have it ready to go. Just answer what is being asked.

Long-Form Narrative Questions

In addition to the goals, outcomes, and objectives, most proposal narrative sections are going to request some long-form written answers. Luckily for Maplewood Roots, they have done that pre-planning and the preparation, so they have a wealth of knowledge that is going to go into writing these answers. For the sake of time today, I chose one pretty common question that I see all the time and included a word or character limitation on it. Before you begin, this is all the information that you should have already pretty much ready to go.

Once your information is established, it is a good and an okay thing to be repetitive throughout your application questions. This relays consistency in a well-thought-out plan. Don't worry about being repetitive, because that is a good thing. That is showing that you know what you're talking about. Competitive grant applications are built in phases and drafts, so over the next few slides you're going to see that each phase or each draft is built upon the last.

With this question in mind, listed at the top, we're going to kind of begin to look at what that looks like. Describing your project in detail — as you can see here, the first draft on the left is really just that. It's your first draft, your thoughts are on the paper, and then it's time to review. You can break it down line by line if you need to. To begin, we would take our first statement: “Maplewood Roots is a nonprofit organization that supports residents of Maplewood and the surrounding area in Monroe County.” This is fine, but it could really easily be bumped up just a notch to: “Maplewood Roots is a nonprofit organization dedicated to supporting residents of Maplewood and the surrounding Monroe County.” Being concise and specific with your language and writing actionably, your introduction is that much more powerful.

Then you're going to repeat that step for the rest of the application as well. This is the full statement from the previous slide written out, and it's meant to be a visual representation of the phases being built. With thoughtful consideration, you can make these changes, and by sharing documents and tracking changes through Word docs or Google Docs, you'll be able to see your progress and build upon the phases one after the other. This is especially helpful if you're working on it with someone else and going back and forth between draft and review, draft and review. Finally, we will look at it side by side. You can see here that we've included a lot stronger language, more clear, and throughout the process of building on one another, we're coming out the other side with the most competitive proposal we can put together. So don't stop at one draft, don't stop at two. Building upon your previous work is super helpful in making your application stronger and stronger.

The Budget

Now that we've covered what the narrative looks like through the goals, objectives, and outcomes, as well as some longer-form narrative questions, we're going to take a look at the budget, which I know is something that folks have reservations about. Just a couple of high-level notes. First, make sure that what you're proposing to buy is an eligible expense. The majority of funders will provide a form for the budget, so it's really important to use it. If they provide it, that's how they want it. Don't go off script — use their form. As you can see here, this is a screenshot of a real funder's form. They tell you what they want to see, what they are going to be funding, and other funds that are going into the project. They may request that information from other budgets to show and prove that you've thought about how to implement the whole project. They can give you money for software, but if you don't have someone dedicated to getting that off the ground, it's essentially useless. It just helps paint a larger picture for the funder of what is going into the whole project and what your organization is contributing.

Double-check your math. I go through with a calculator even if the Excel sheet has formulas built in that do the addition for you, because they're people on the other side and they make mistakes and things are broken. So just double-check your own work before you send it back.

Budget Justification

Next up, we're going to talk about justifying all of these costs. You're going to have to justify the expenses on this form, so if you're having trouble justifying it, you may want to be more selective about what's being included. The budget justification is going to cover some of these things at a higher level. Again, if you are struggling to write this justification narrative, rethink your desire to include it.

Alignment Between Budget and Proposal

Which is essential to say because the next step before you move on from the budget is making sure there's alignment with your budget and your proposal. As you can see here, “platform software” is included in the project narrative, in the budget, and in the budget justification. It's spelled the same way. It will be referenced in the same way throughout your whole proposal, and that is incredibly important. Before you move on, as you're checking your alignment, you'll want to ask: Are all the activities accounted for in the narrative and the budget? Are all the costs clearly tied to the activities? Is language concise and consistent? And are all calculations right? If it says $6,000 on the Excel sheet, it should say $6,000 in the budget justification. If it's mentioned in the project narrative, it should say that there too. Making sure that that is across the board is incredibly important for accuracy and credibility.

Supporting Documents

Before we get to our last steps, there's a note on supporting documents. I don't have a whole lot to say on this section, other than make sure you're really clear on what is being requested. Make sure you have them and they're in the right format. Make sure they are included when you submit. All applications are going to require different things, but just a couple of examples of what that looks like is potentially proof of tax status, bios on your board of directors, letters of support, and so on. Those types of things would be included in this space.

Before You Submit

Lastly, I'm going to look at some high-level things to think about before you submit. You'll want to reread the request for proposal, make sure you didn't miss anything in the guidance, answer the questions being asked, and in the format being asked in. Verify overall proposal alignment. That's going to look a lot like your budget alignment, but it's going to focus on a couple of other key things as well. You're going to want to really focus on this as a critical last step. Alignment is a way to show your funder you're credible and that you think things through and you connect the dots — you do that for them.

To better explain alignment, I'm going to explain some things not to do, and I hope that kind of creates this picture of how to do this right. First, you're going to want to make sure that you're not using different terms to describe the same thing. An example would be the Maplewood Roots Family Center versus the Maplewood Roots Center. That can be confusing to a reviewer that has no idea about your organization. Another thing that commonly trips up reviewers is acronyms that are either used without

explaining what they stand for, or being used really far away from where it is originally explained, and the funder has to go back up and find what that meant. So always spell it out the first time. Always spell it out the first time it's mentioned in the next section, and then use your judgment if it's been a really long time and a really big section — sprinkle it in again so that the reviewer has it fresh on their mind. Make sure you're not using insider language or knowledge without going the extra step in explaining it. Assume the reviewer has no clue.

Finally, make sure that there are no missing details in one of the sections. If the narrative mentions a new program or service, but there's no cost associated with it or explained away in the budget, then that's a problem. And reversely, if things are on the budget and they're nowhere in the narrative, that is a problem. There needs to be consistency throughout these sections. Once the alignment check is done, you are almost ready to submit. You will want to have a colleague check your work, preferably someone who hasn't been immersed in the document for several weeks, and then you will be ready to submit on time. I know we are really winding down the hour, so I'm going to go ahead and pass it over to Emily to talk about Ingram Micro.

Ingram Micro Grant Services

Emily Nolan:
Great, thanks so much for joining us today. Real quick, I just wanted to let you all know that my name is Emily Nolan and I'm the Program Manager for the grant program over at Ingram Micro. We provide free grant services to our partners and their customers, and that includes prospect research, grant writing itself, reviewing any proposal materials, and also reporting on grants awarded. My experience includes almost 20 years in the nonprofit sector prior to being with Ingram Micro, with the last ten of which specifically focused on grant writing from foundations and government sources. We're just here to support our partners and their customers on funding for cloud. So thanks so much for joining us today.

Q&A Session

Michael Paddock:
Thanks Kate. We are at the top of the hour. I've gone ahead and answered the questions that came in through the Q&A interface. One was relating to foundations and how best to approach foundations, and the other was relating to the use of AI — certainly a hot topic. Maybe we'll do a whole webcast on that at some point in the future, but I gave some thoughts on our use of AI here at Grants Office and how you might think about that going forward. That's always subject to change as AI changes, but for now this is how we're approaching it.

Closing

Michael Paddock:
I want to very much thank our sponsor, Ingram Micro, for sponsoring today's session and allowing us to bring this information to you. Big thanks to our presenters, Shawn Flaherty, Emily Nolan, Sandy Trowbridge, and Amber Walker, for sharing their knowledge and insights with us. Really, it was a jam-packed session full of great information — a real masterclass in navigating the grants landscape. Thanks to all of our presenters, and thanks to all of you. Appreciate you attending today. I hope you found this a valuable use of your time, and we'll look forward to seeing you again on a future webcast. Have a great day, everybody.

— End of Transcript —

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