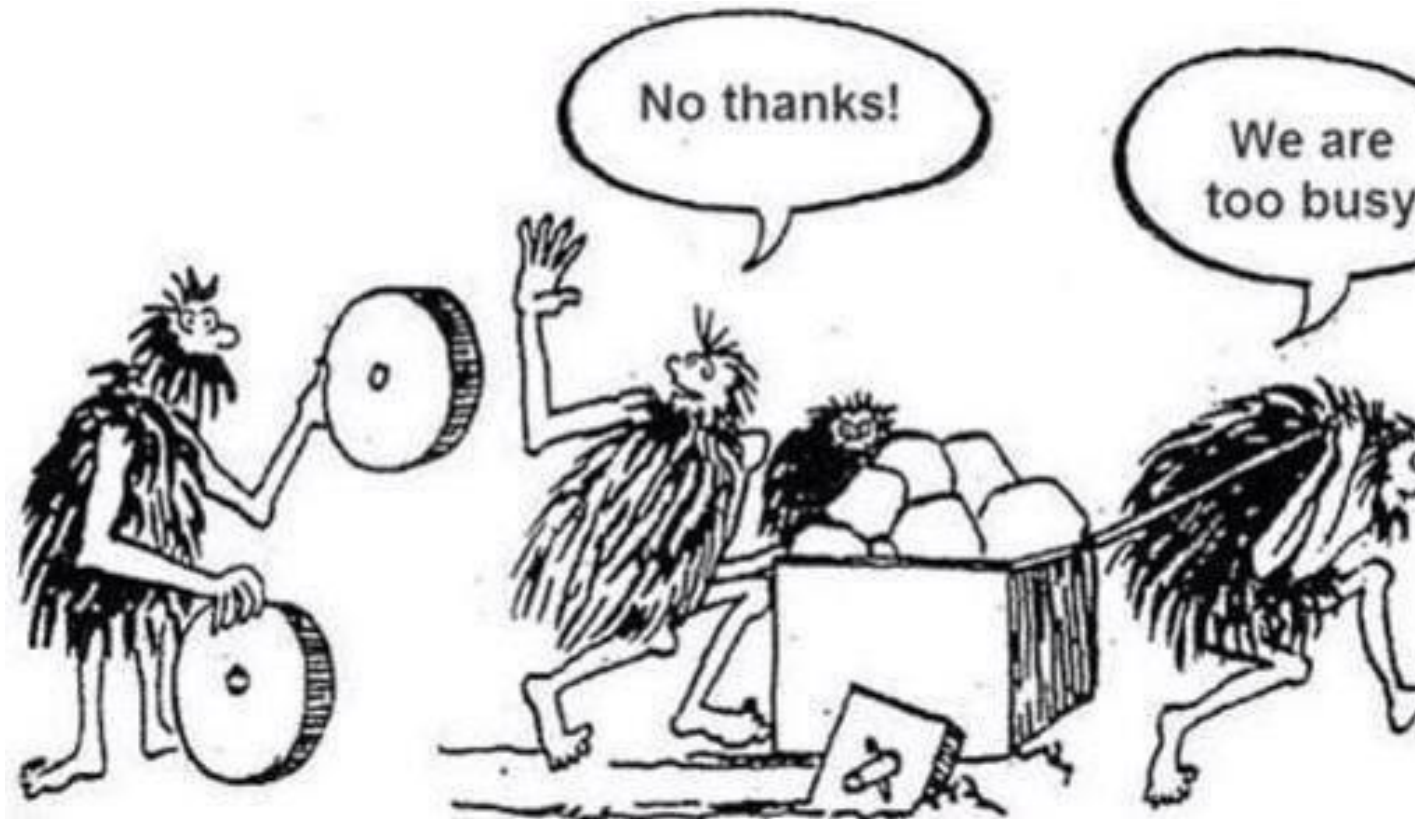




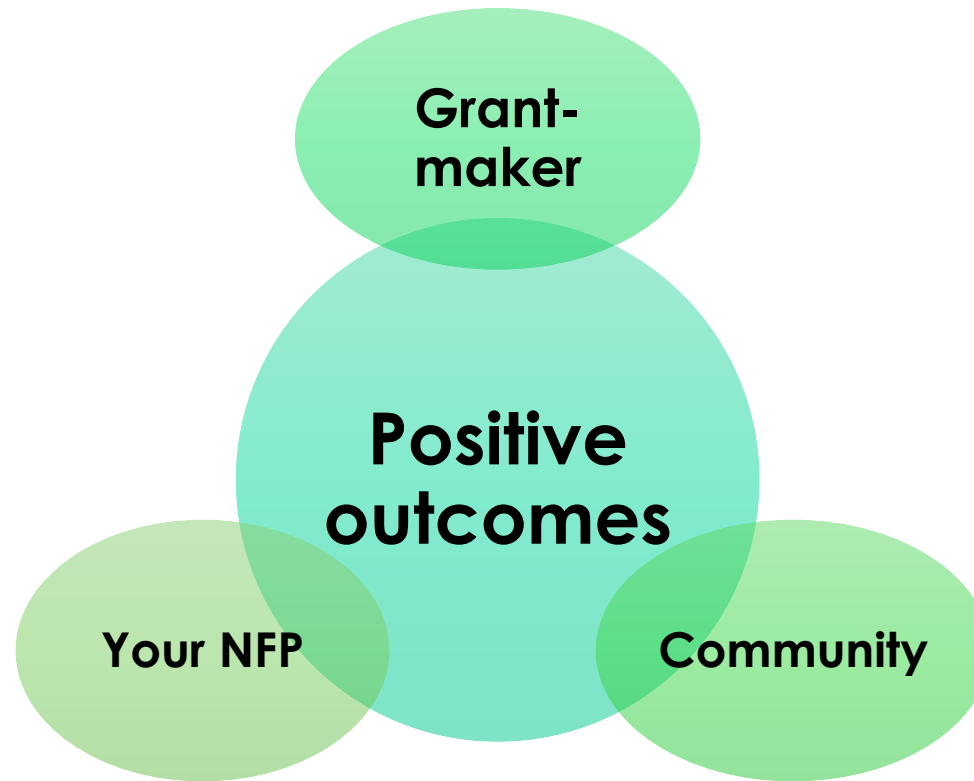
# What you need in your backpack: Essential preparation for grant applications

Charlotte Francis,  
Strategic Grants State Manager,  
VIC, SA & TAS

# Why have grants strategy and processes?



**Grant-seeking is major gift fundraising  
that enables delivery of your organisation's mission  
and...**



# Grants Strategy:

- Key Messages statement
- Prioritised wish list
- Project plans including evaluation plan and budget
- List of funder deadlines
- Recorded grants history
- Sustainability plan
- Clear and current website
- Good writer



# #1 time saver for grants?

## Key messages document!

- ✓ **C**lear
- ✓ **C**ompelling
- ✓ **C**oncise
- ✓ **C**onsistent
- ✓ **C**orrect
- ✓ **C**ertified
- ✓ **C**urrent!

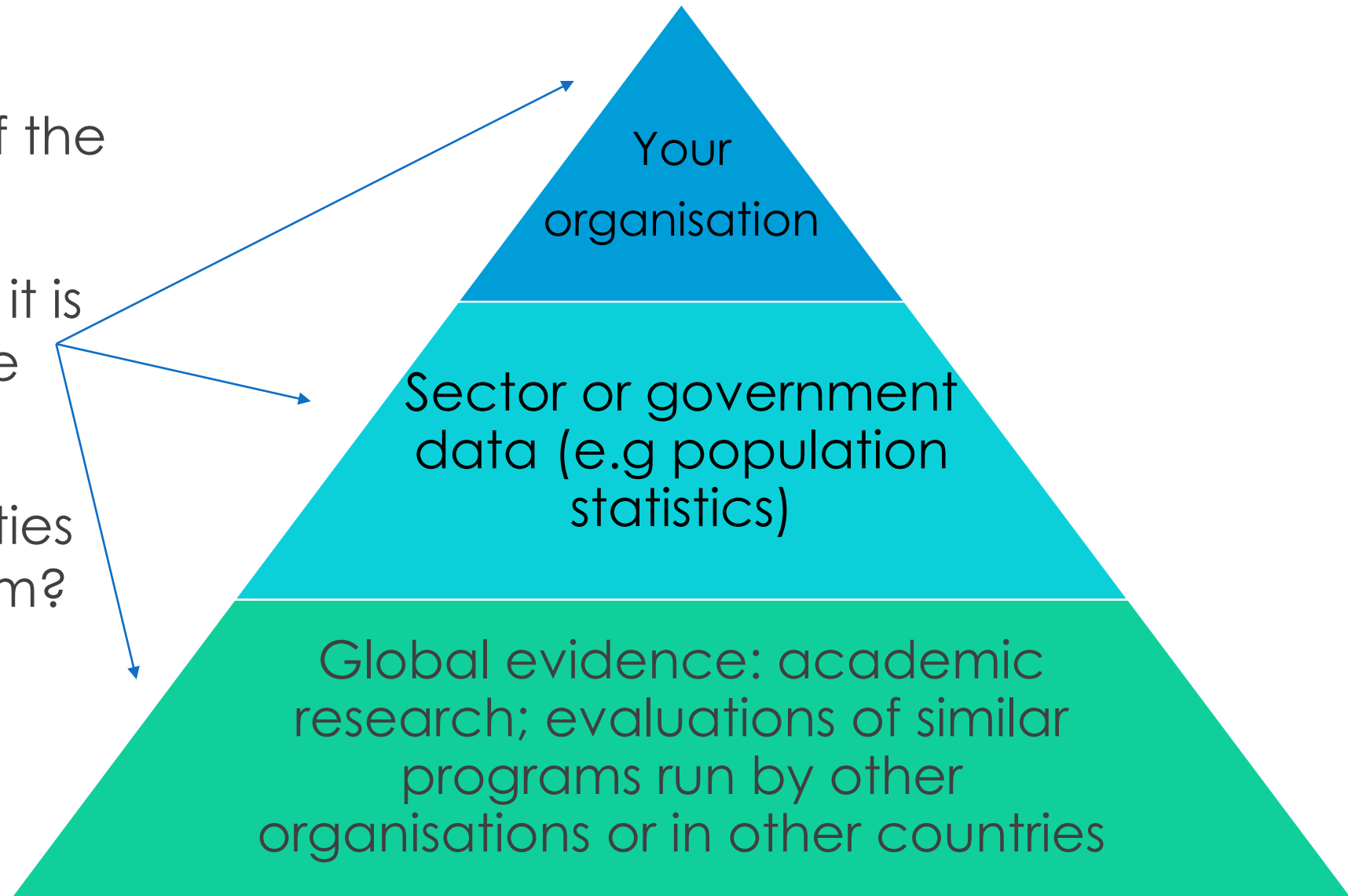


# Key Messages

- Organisation description
  - short version (50 words) written/spoken
  - long version (250 words)
- Vision, mission and purpose
- Organisational history
- Key achievements
- Scope
  - size and nature of target group(s), geographical coverage
- Number of staff and volunteers and profiles of key staff
- Funding breakdown
- Needs data that supports your work
- **Niche offering**
- **Partnerships**
- **Examples of successful projects/case studies**
- **Top strategic priorities for next 12 months and three years**
- **Organisational efficiency and effectiveness Key Performance Indicators** – how do you measure performance?
- **How you measure program performance?**
- **A summary of all your admin details**

# Project Plans

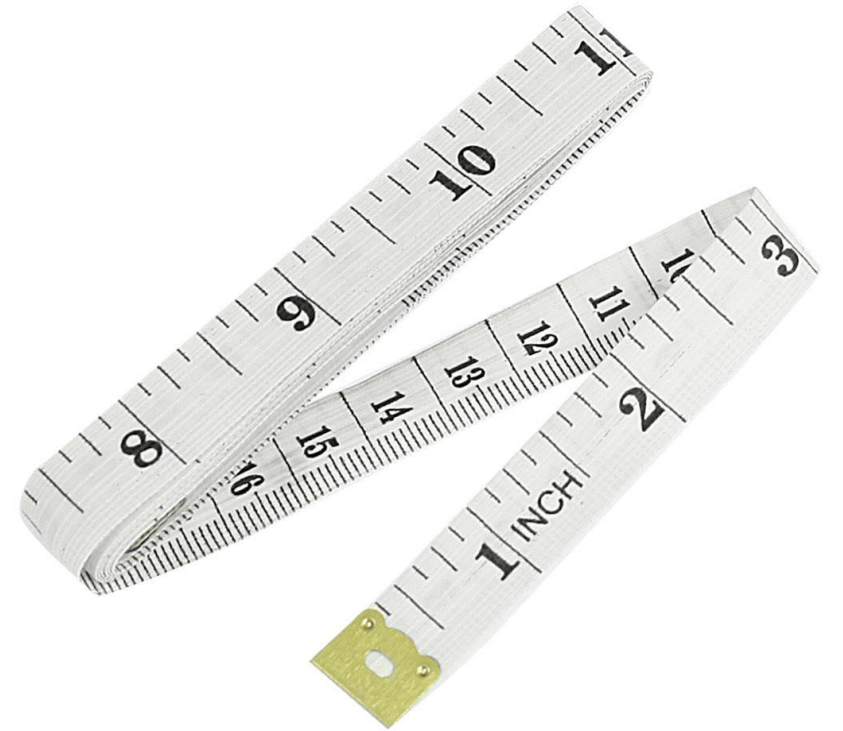
- What is the aim of the project?
- How do we know it is needed? (provide evidence)
- Strategies / activities to achieve the aim?





# Project Plans

- What are the outputs of the activity? The NUMBER of people you will reach, products or services you will purchase, deliver or distribute.
- What are the outcomes? The changes that will occur as a result of the activities and outputs?
- How will you measure your success?
- Can you complete the project in the required timeframe and report according to the funder requirements?





## How do we measure these outcomes?

- Make sure you know what data to collect right from the start of your project! (Do you need to collect baseline data before you project begins?)
- The kind of data you collect is dependent on the outcomes you want to measure
- Do you already have some data from previous projects that shows project outcomes?



## Evaluation Toolbox

### **Quantitative tools- counting measures**

How many, how much or how often something has occurred.  
often expressed as percentages, ratios or rates. Eg.

- Head count:
- Testing & Pre and post tests
- Rating Scales
- Comparison and Controls

### **Qualitative tools – measures of human experience**

Why or how something happened  
useful for understanding attitudes, beliefs and behaviours.

- Observation
- Surveys
- Journals
- Case Studies
- Focus Groups
- Interviews



# Project Budgets

## Total cost to your organisation to implement?



- Include **all** costs
- Don't make figures up. Get quotes!
- Funding from other sources? More often than not now funders require co-funding or matching contributions.
- Ensure that **income and expense columns for your project budget are equal!**

### Tip: Funders like to see co-contributions to your projects

Include volunteer time as a personnel time 'cost' (ie. the cost to your organisation if you had to pay someone to do their work) as well as an 'in-kind' contribution to the project on the income side!

# Have you captured past grants history?

- Where are donor transactions recorded?
- Past grants? **Existing donors are your best prospects!**
- Have all acquittal reports been provided on time?
  - any multi-year grants in place?
- Relationship status with current and previous grant-makers?
- Who makes prospect calls and manages relationships?



# Grants are only part of the fundraising mix

## Can you demonstrate sustainability?

Common fundraising methodologies include:

- Direct mail
- Online campaigns / Crowd funding
- Major donors (individuals and grants)
- Capital campaigns
- Lotteries / Art Unions
- Events
- Corporate partnerships and sponsorships
- Bequests
- Merchandise
- Social enterprise
- Regular Giving
- Community Fundraising







# What's your funder stewardship strategy?

Do you:

- Call the funder before applying? (Don't be afraid to pick up the phone!)
- Have coordinated funder communications?

Do you have a strategy for:

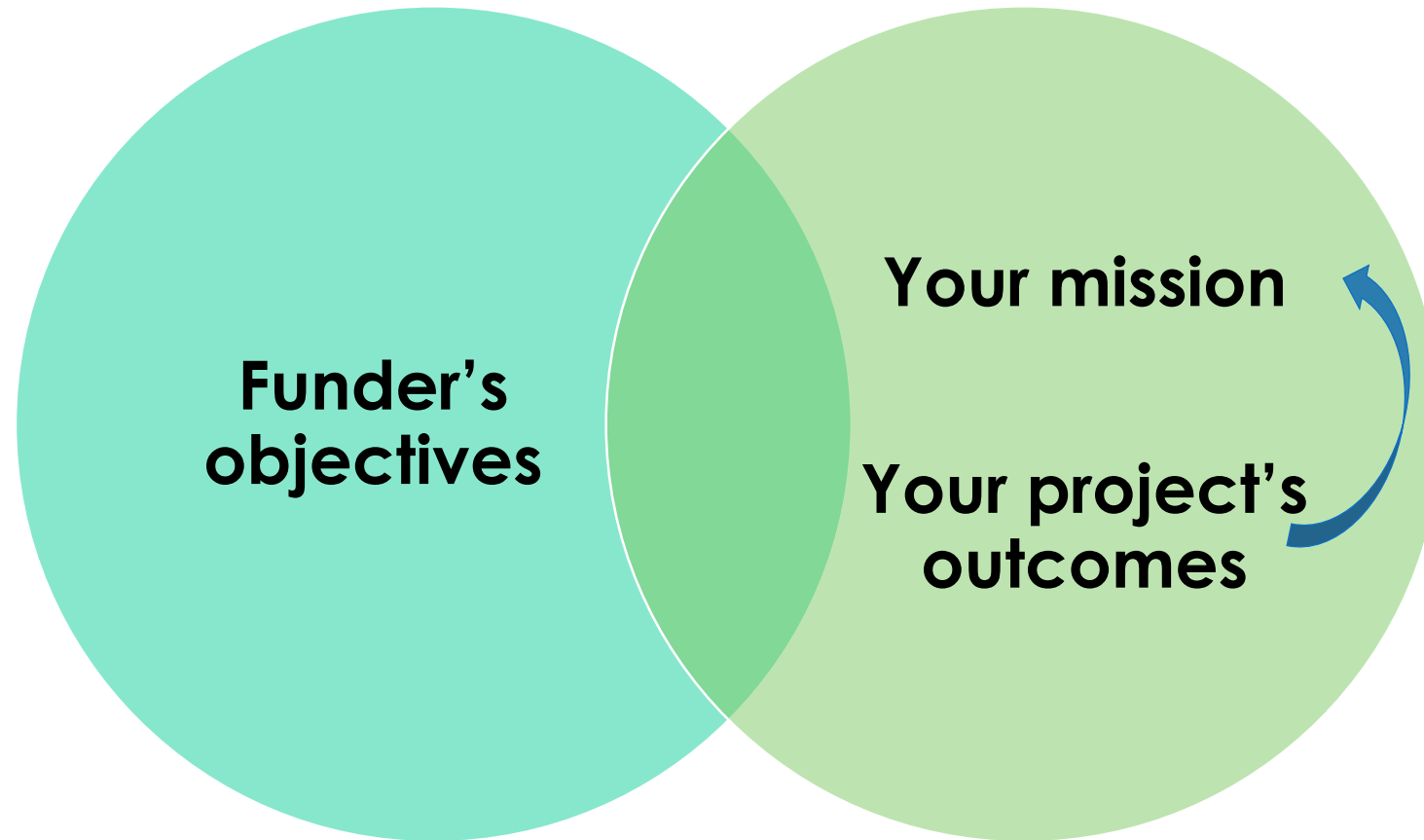
- Connecting with funders?
- How you thank your funders?
- Involving your funders in the project?
- Communicating with your funders when things aren't going to plan?

# Why do you need such a full backpack?

1. Your mission, supported by a well-developed strategic plan, must be the “horse” to your grant-seeking “cart”
2. Funding decisions are made on “quality of leadership: preparation, understanding and diligence” (Leonard Vary, Myer Foundation)
3. To ensure you can submit before the deadline!
4. To reduce stress and save time!
5. To put your best (practice) foot forward!



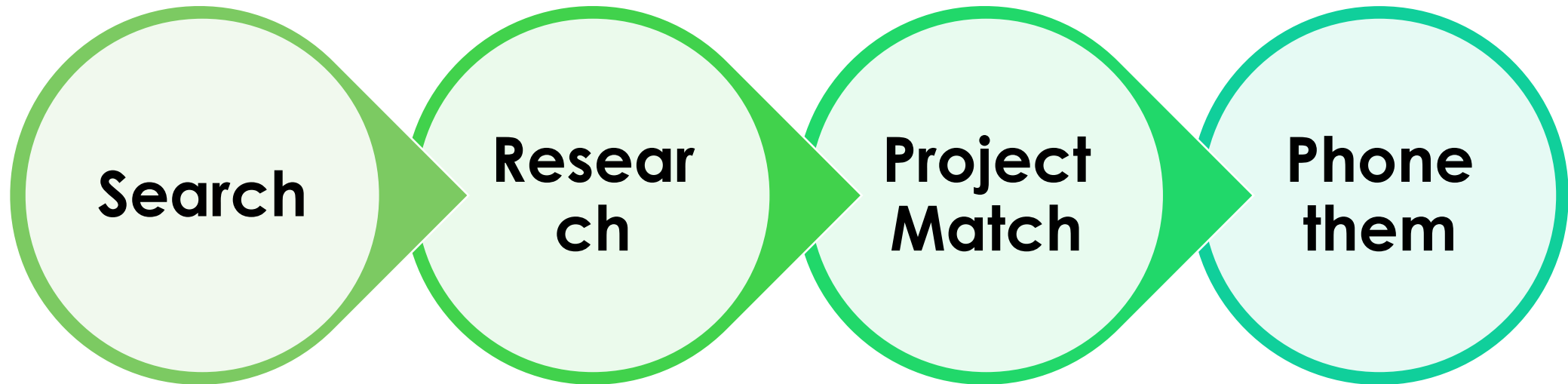
Once your backpack is full...go forth and seek grants...strategically



*Project outcomes **must** align with mission!*



# Your Grants Research Strategy





# Final messages



- Get processes and documents in place before you seek grant funding.
- Make sure you understand your potential funder's reasons for funding.
- Planning is essential to success!
- Ensure the grants you are spending time applying for really match your organisation's mission and project needs!
- **Persevere!**



# Questions and discussion

More questions we didn't answer today? Get in touch!

[info@strategicgrants.com.au](mailto:info@strategicgrants.com.au) 07 3892 1150

Visit our website for free grant-seeking resources and other training opportunities, and subscribe to our newsletter!

[www.strategicgrants.com.au](http://www.strategicgrants.com.au)

