



COMPANION WORKBOOK FOR THE

# **YALI Network Online Course**

## **Fundamentals of Grant Writing**

## **Welcome to the companion workbook for the YALI Network Online Course, Fundamentals of Grantwriting!**

Think of this workbook as a guide to help you better understand the lessons in this course and how to apply what you learned! After you watch each lesson from the course, return to this workbook and complete the corresponding activities.

In addition to completing this workbook, don't forget to also review each lesson's Discussion Guide, as well as the additional resources available on the "Lesson Resources" tab on each individual lesson page (as illustrated below).

[Overview](#)

[Transcript](#)

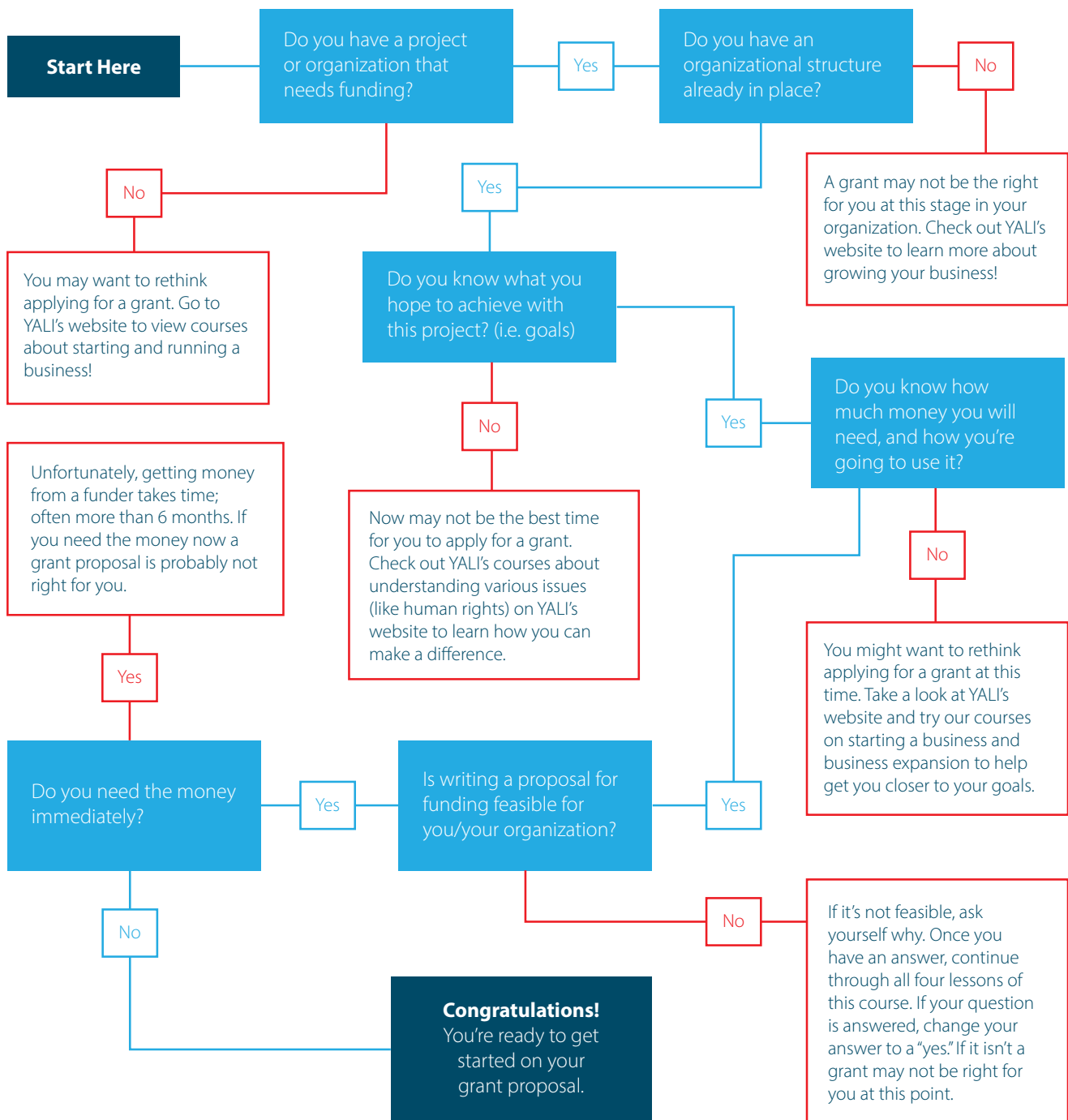
[Lesson Resources](#)

[Audio](#)

# Lesson 1: Planning to Write Your Grant Proposal

## Activity 1: Is a grant proposal right for you?

Complete this activity after reviewing lesson one: [Planning to Write Your Grant Proposal](#). Answer each question in the flowchart below to see if your organization is ready to apply for a grant.



All of the YALI Network Online Courses can be found at [yali.state.gov/courses](http://yali.state.gov/courses).

## Activity 2: Meeting Funder Requirements

Complete this activity after reviewing lesson one: [Planning to Write Your Grant Proposal](#). A funder is likely to require you to have a budget, a logic model, and examples of past performance. Fill out this worksheet to help gather information about your organization, so you are prepared to meet a funder's requirements.

Your Logic Model:	
<b>What resources do you need to achieve your goals?</b>	<b>What activities do you perform with these resources?</b>
<b>What will the outcome be of your work?</b>	<b>How will these outcomes make changes for participants or communities?</b>
<b>What is your organization's budget?</b>	

**How is that budget broken down? (What amount do you plan to spend in high-level organizational areas like staffing, operations, marketing, etc?)**

Organizational Area	Budget
<b>Total</b>	<b>\$</b>

**What examples of past performance does your organization have? (What successes have you had in your community, how have you used funder money before, what are your biggest accomplishments, etc?)**

Example 1	Example 2	Example 3

### Activity 3: Learning about Funders

Complete this activity after reviewing lesson one: [Planning to Write Your Grant Proposal](#). Understanding what type of funder is the right fit for your organization is an important part of deciding which grants to apply for. To help further your understanding of the different types of funders, use what you learned in lesson one to complete the activity below.

Choose the letter with the best description to define each type of funder listed	
1) Individual Donors	A) Will usually want some recognition in the form of inclusion of company logo/name on your organization's assets
2) Corporate Foundations	B) Comprised of donations from general members of the public and usually restricted to a specific geographic area
3) Corporate Marketing Departments	C) Typically overseen by family members
4) Private Family Foundation	D) Funding comes from corporate revenue, but is run through a separate entity usually governed by a board of trustees
5) Private Independent Foundations	E) Can either give grants or award contracts.
6) Community Foundations	F) Separate people who give you money or in-kind donations
7) Governments	G) Typically governed by a mix of family and people that are in the personal or professional networks of family members

ANSWER KEY

1 - F      2 - D      3 - A      4 - C      5 - G      6 - B      7 - E

# Lesson 2: Researching Your Grant Proposal

## Activity 1: Determining if a funder is the right fit for your organization

Complete this activity after reviewing lesson two: [Researching Your Grant Proposal](#). Before you submit your grant application, it's important to thoroughly research the potential funder and determine whether they are the correct choice for your needs. This worksheet will help you gather your research on each of your potential funders. Be sure you can answer all questions about each funder after you've completed your research.

Answer the below questions with a **YES or NO**, and then once completed, follow the instructions at the bottom of the page to determine your results. You should complete this worksheet for each funder you are considering.

**Funder name:** \_\_\_\_\_

### Section 1:

Can you meet this funder's requirements for submitting a proposal? \_\_\_\_\_

Is the money offered enough/suitable for your organization's activities? \_\_\_\_\_

Does your proposal align with the funders goals and mission? \_\_\_\_\_

### Section 2:

Has this funder funded other programs/projects/organizations similar to yours? \_\_\_\_\_

Has this funder previously funded in your community? \_\_\_\_\_

Has this funder previously funded in your geographic region? \_\_\_\_\_

### Exercise Instructions:

Review your answers. For each YES answer, give yourself one (1) point. For each NO answer give yourself zero (0) points. Add those points up below:

**Section 1 points:** \_\_\_\_\_      **Section 2 points:** \_\_\_\_\_

In order for this funder to be a good match for your organization, you must have **three (3) points** in Section 1. If you scored 2 or below for any potential funder, you may want to reevaluate if this funder is a good option for you.

If you have three points in Section 1, move on to Section 2. In order for you to be a good match for a funder, you must have at least **two (2) points** in Section 2. If you scored below 2 in this section, you may want to reevaluate if this funder is a good option for you.

If you have passed Section 1 and Section 2, **congratulations!** You have found a funder that is likely a good match for your organization.

## Activity 2: Networking to promote yourself and your organization

Complete this activity after reviewing lesson two: [Researching Your Grant Proposal](#). The lesson highlights the importance of networking. This exercise will provide a format for you to record your networking engagements.

As part of this exercise, you should reach out to other organizations who are doing similar or related work to your organization. Gather information about where they are getting funding and their experience with the funding process. Record your interactions here.

Organization Name	Person Contacted	Do they have a funder? (Yes/No)	If yes, who is the funder?	Information gathered

Some additional questions you should consider asking are:

- What was the funding application process like?
- If you don't mind me asking, how much funding are they providing you?
- Do you have any recommendations for how I can get my application for funding approved?
- Who was your contact at the organization that provided funding?

Always remember to follow up with a "thank you" email or letter to the people you've connected with.



# Lesson 3: Writing A Grant Proposal

## Activity 1: One Sentence Challenge

Complete this activity after reviewing lesson three: [Writing A Grant Proposal](#). An important part of writing a successful grant is writing about yourself in a clear, concise way. As a prompt to help you more efficiently write about yourself and your organization, answer the following questions clearly and accurately **in only one sentence**.

What is the mission of your organization?

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What is the problem you and your organization are trying to solve?

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What is the solution to the above problem that you and your organization will provide?

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How will the funding you are seeking impact your organization in its effort to create the above solution?

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How does the work your organization is doing matter? What makes it important?

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Next Steps: Use your answers above to complete your logic model and outline how you will evaluate and measure the impact of the program or project for which you are seeking funding.

## Activity 2: The Grant Checklist

Complete this activity after reviewing lesson three: [Writing A Grant Proposal](#). Use this checklist to help make sure your grant proposal contains all the necessary information to be considered by your selected funder.

<p><b>Before You Write</b></p>	<ul style="list-style-type: none"> <li><input type="checkbox"/> You have reviewed and understand funder's goals and guidelines</li> <li><input type="checkbox"/> You have all required documents for the proposal</li> <li><input type="checkbox"/> You have an outline for your proposal with planned sections to respond to all funder guidelines</li> </ul>
<p><b>While You Write</b></p>	<p>Your grant proposal contains...</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> A narrative with the following information:           <ul style="list-style-type: none"> <li><input type="checkbox"/> Explanation of the problem</li> <li><input type="checkbox"/> Explanation of your solution</li> <li><input type="checkbox"/> Identifies people being served by your organization</li> <li><input type="checkbox"/> Timeline</li> <li><input type="checkbox"/> Action steps</li> <li><input type="checkbox"/> Who in your organization performs which tasks</li> </ul> </li> <li><input type="checkbox"/> Organizational overview</li> <li><input type="checkbox"/> Staff Information</li> <li><input type="checkbox"/> You and your organization's expertise on the subject of your work</li> <li><input type="checkbox"/> Your budget, containing:           <ul style="list-style-type: none"> <li><input type="checkbox"/> Your organization's revenue streams</li> <li><input type="checkbox"/> Your organization's expenses</li> </ul> </li> <li><input type="checkbox"/> Your organization's funding history (if applicable)</li> <li><input type="checkbox"/> An explanation of how and when evaluation will take place, which:           <ul style="list-style-type: none"> <li><input type="checkbox"/> Explains the problem you're trying to solve</li> <li><input type="checkbox"/> Identifies your organization's objectives</li> <li><input type="checkbox"/> Identifies indicators of success for your organization</li> <li><input type="checkbox"/> Sets a guide for your data collection and analysis</li> <li><input type="checkbox"/> Sets up a timeline for funder monitoring of your progress</li> </ul> </li> <li><input type="checkbox"/> How your organization will make an impact</li> <li><input type="checkbox"/> How your organization is sustainable (can survive after funding period)</li> </ul>
<p><b>After You Write</b></p>	<ul style="list-style-type: none"> <li><input type="checkbox"/> You have included all the required paperwork</li> <li><input type="checkbox"/> You have had a peer or close confidant review your proposal for grammar/errors</li> <li><input type="checkbox"/> You have reviewed your proposal for grammar/errors</li> <li><input type="checkbox"/> You have submitted your proposal</li> </ul>

# Lesson 4: Following Up on Your Grant Proposal

## Activity 1: The DO's and DON'T's of Follow Up

Complete this activity after reviewing lesson four: [Following Up on Your Grant Proposal](#). Applying the information you have learned about managing the relationship with your funder, fill out the below prompts with either a **DO** or **DON'T** for each recommended step. See how you did by checking the answer key after!

	DO or DON'T	Action
1		Perform activities as you indicated in your grant proposal
2		Use the funds or donations exactly as you have outlined in your proposal
3		Include less data and evaluation than you have promised
4		Schedule a call or visit with the funder once you receive a grant
5		Communicate with the funder however you want, regardless of their requirements
6		Be responsible with grants and donations received
7		Keep details about your projects and programs to yourself
8		Share stories of your successes with your funder, your peers, the media, or others
9		Retain bank statements, receipts, and contracts for goods and services
10		Be discouraged if your grant proposal is rejected

#### **ACTIVITY 4: THE DO'S AND DON'T'S OF FOLLOWING UP ON YOUR GRANT PROPOSAL | ANSWER KEY:**

- 1 - Do - The funder has trusted you with their money/resources, you should follow through with what you promised.
- 2 - Do - Your grant agreement is very important to your reputation, and you should follow through with it completely.
- 3 - Don't - You'll need to supply your funder with all the data they require to evaluate your performance.
- 4 - Do - Communicating with your funder effectively will help to lay the foundation for a strong, ongoing relationship.
- 5 - Don't - Professional courtesy is important when dealing with funders. If your funder specifically asks to hear from you at certain time intervals, don't stray from them unless absolutely necessary.
- 6 - Do - Not only are you entrusted with someone else's money, your reputation is also in your hands, so it's important to be responsible.
- 7 - Don't - When you have successes, it's important to share them with your funder. Learn how to tell your stories in the next activity!
- 8 - Do - Your success stories will go a long way towards building your reputation and rapport with your funder.
- 9 - Do - Maintaining a full history of your organization's transactions will be important to prove to your funder that you are a good steward of their money.
- 10 - Don't - Many people apply for grants, and not all are accepted. However, every rejection is also a learning opportunity. Reach out to the funder to find out why you were rejected and how your proposal could be improved.

## Activity 2: Telling Your Story

Complete this activity after reviewing lesson four: [Following Up on Your Grant Proposal](#). When your organization achieves a success, whether a large- or small-scale success, it is important for you to tell that story in a concise, yet powerful, way. These prompts will help you gather information about a success so that you can more easily tell your stories. **Try to limit your responses to one sentence.**

What specific challenge was your organization facing?

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What was accomplished?

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Who accomplished this success?

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What was the timeframe of this success?

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Where did the success take place?

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Why is this success important for the work your organization is doing?

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How did the funding you received lead directly to this success?

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