

# **IT'S ALL ABOUT RELATIONSHIPS**

## **Successful Grantseeking from a Funder's Perspective**

Presented at 2008 Calgary City Teachers Convention by  
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### **DEFINITION OF RELATIONSHIPS...from Merriam Webster Online Dictionary...**

*"the relation connecting or binding participants; specific instance or type of kinship; OR a state of affairs existing between those having dealings...."*

The Funder/Grantee relationship is INDEED just that – a relationship. Every relationship is only successful with common values....

### **OUR VALUES - OR THE RULES WE LIVE BY**

- Be humble
- Be empathetic
- Be Open Minded
- Be mission/Value driven
- Always build goodwill/trust
- Be accountable
- Sustain a fundamental commitment to learn

### **YOUR VALUES... RULES TO LIVE BY (exactly the same)**

Relationships rely on **EFFECTIVE COMMUNICATIONS**

- **Two way**
- **Listening**
- **Understanding**

## RELATIONSHIP PHASES:

Relationships have various phases....and the Funder/Grantee relationship strikes a similar parallel....

- **Courtship**
- **Bonding**
- **Commitment**
- **Partnership**

## COURTSHIP

### WHAT MAKES A GOOD PROJECT/PROGRAM/INITIATIVE?

- **Is it an enhancement?**  
A program, project or initiative not part of the regular curriculum and supported with a budget from your school board/province?
- **Does it address a huge need/gap?** Early literacy, bullying, career development, civic engagement/volunteerism, ESL student support
- Is it **innovative, unique**, ground-breaking?
- Is it **proven/tested? Or a pilot?**  
(If it has merit, either way, we will consider funding it)
- Does it **support the highest need student** population? Economically, socially, culturally, behaviorally, academically?
- Will it **make a difference for the students?** Have a direct impact on them?
- Will it **impact/involve others** – families/parents, other students in/out of the school, other schools, the local community, businesses
- Does it **help students succeed** – success can mean many things.... learning to be more tolerant, feeling included/safe, having a club to join, getting a summer job, getting support in your own language/culture, learning community service, as well an academic piece like being able to read a book on their own, etc.
- **Can or should it be sustained?** Meaning, will the school be able/committed to delivering it again if there is success/demand? Will the school system be able to support it beyond the initial grant?

### FUNDERS GUIDELINES. Follow them....Really!

A funder's guidelines will tell you what to include in a grant proposal for its organization. Most funders want the same information, even if they use different words or ask questions in a different order.

Most funders, such as EducationMatters, prefer that you fill out their own application forms. If the funder uses an application form, be sure to get a copy and follow the instructions.

- **Understand their mandate** – it's there for a reason! And know their priorities/themes/granting history (if possible)
- **Be clear on your needs as well** - does their grant timing work, do you have the resources to deliver the program, is their granting range suitable?

***Talk to us! We truly are an ally, partner, community friend.***

## **EDUCATIONMATTERS...guidelines**

### **Our Priorities are**

- Ensuring students are successful
- Ensuring that all youth are ready for adult life.

### **The key themes that we support are**

- literacy
- career and life skill development
- leadership and civic engagement
- diversity programs, and program for ESL students
- successful transitions for students
- students with special needs

*We focus our support on challenged students*

### **Our Funding Guidelines:**

- Our grant dollars are dispersed through our Public Education Enhancement Discretionary Fund, and other Special Interest and Donor-directed Funds
- The range of our grants is typically **\$5,000-\$25,000**. PLEASE DO NOT ASK FOR MORE THAN THE MAXIMUM.
- We will fund an entire program or a key element of a program.
- We will support pilot programs, ongoing programming or one-time initiatives. .
- We will fund certain training, fees, and equipment/supply costs
- Our support is given to programs/projects that directly impact the Calgary student, are meaningful and help students succeed.
- Our grant dollars can be expended by the successful grant recipient over a 2-year period.
- We would consider a second round of funding for the same program but emphasize that we encourage program managers to develop a plan for long-term sustainable support beyond our initial grant.
- Not every applicant is guaranteed funding.
- Grants are distributed based on our available dollars and the program/project's fit with our mandate and mission

## Who is eligible for a grant through EducationMatters?

Make sure you know this information BEFORE applying. Again, contact us or any funder you are dealing with. **EducationMatters' eligible applicants include:**

- Calgary Board of Education departments, schools
- Any charity that directly serves Calgary's public education students

## BONDING

**The Application** –What to write, what the funder is looking for

The following outline should meet the needs of most funders, or guide you when approaching a funder with no written guidelines.

*PLEASE REMEMBER TO ANSWER YOUR QUESTIONS IN THE SPACE ALLOTTED. MORE IS NOT ALWAYS BETTER.*

### Summary

**BE ABLE TO SUM UP YOUR PROGRAM AND REQUEST in 1-2 sentences.....**use it in your cover letter or email....

For example:

*"John Doe Elementary School requests \$10,000 for a two-year ESL/Literacy program. This program is designed to support the school's ESL student/family population in the development of their literacy skills with focus on cultural diversity."*

### Organization Information

In the application you will be asked for information about your organization. If you're a school applying, tell the funder which school and who the key contact for the program.

Don't leave anything out....address, email, telephone number, GRANT AMOUNT BEING ASKED FOR!

**Program goal or purpose.** Clearly, succinctly describe this

*i.e. The goal of our Volunteer Club is to develop leadership qualities in our students, provide them opportunity for civic engagement and build citizenship values.*

and how it is an **enhancement for the students...**

i.e. *Volunteer Club is an extra-curricular activity but that directly supports CBE ends and Character Development areas in the overall curriculum.*

### **Challenge/Need**

This is where you convince the funder that the challenge you want to tackle is important and that your school/program has an innovative solution or critical need. Here are some tips:

- **Don't assume the funder knows much about your subject area.** Most grant makers are generalists – NOT EDUCATORS. They will probably know *something* about topics like Shakespeare, water pollution and HIV/AIDS, but you should not assume that they are familiar with "Troilus and Cressida," taconite disposal methods or Kaposi's sarcoma.
- **Why is this situation important?** To whom did your organization talk, or what research did you do, to learn about the issue and decide how to tackle it?
- **Describe the situation in both factual *and* human interest terms,** if possible. PLEASE AVOID education acronyms like PLP or Coded Students. **Provide brief, simple data** that demonstrates your organization knows the challenge, i.e.
  - 35% of our students are ESL,
  - literacy levels in grade 3 are below the average,
  - students have been asking for a leadership program for the past 4 years.
- **Describe your challenge in context to your school/students,** but also any impacts on local school community (families, businesses, other institutions, other schools).
- **Don't describe the problem as the absence of your project.** "We don't have enough Dual Language books " is not the problem. The *problem* is increased levels of cultural isolation for your ESL students. More Dual Language books is a *solution*.

### **Work Plan/Program Activities**

Describe the program itself.....this is the guts of the application.

- **Who is the target audience, and how will you involve them in the activity? How many students do you intend to serve?** How will the

students actually participate in the program?

- **What are you going to do?** Describe the activities. Tell the funder about the project's "output,"

*i.e.: how many hours of nutrition counseling to how many pregnant students; how many arts shows/year, and how many student artists will participate.*

**Be sure you don't promise an unrealistic level of service.**

- **What project planning has already taken place?** If you have already done initial work, describe it so the funder can see that you are well-prepared.
- **Who is going to do the work?** Demonstrate that the staff or volunteers have the expertise to do a good job.
- **When will the project take place?** Some funders ask for the *project start date* and *project end date*. In general, a project can be said to start when you start spending money on it. If the project is long, consider including a timeline.
- **Where will the project take place?** In your school alone? Partnered with other schools? Is this an offsite program?

Apply the "mind's eye test" to your description. After reading it, could the reader close his eyes and imagine what he would see if he came into the room where your project is happening? Many project descriptions are too vague.

### **Outcomes/Impact**

**Tell the funder what impact your project will have** — what will change about the situation as a result of your project.

*I.e., your Total Wellness Centre program intends to increase the physical health of your students which in turn, is a factor in improving their academic success and overall life success..*

**Impact can be difficult to measure.**

i.e. The desired impact of a smoking cessation program is clear, but the desired impact of a leadership program for teenagers may be ambiguous and difficult to quantify.

**To add to the difficulty, few schools or nonprofits can prove conclusively that a given impact was caused directly by their project.** Do the best you can!

## **Other Funding**

Have other groups/organizations (ie. your school board, parent council, local businesses, service clubs) committed funds to the project or been asked to do so. Funders generally expect you to ask for support from more than one source.

## **Future Funding/Sustainability**

If want to continue this project in the future, how will it be supported? Most funders don't want to support the same set of projects forever. Many funders see their niche as funding innovation: supporting new approaches to old problems or finding solutions to new challenges.

What the funder really wants to see is that you have a long-term vision and funding plan for the project, that the project is "sustainable," especially if it is a new activity. If you don't have such a plan, start thinking about it — if not for your funders then for the success of your project or school or school board.

## **Evaluation**

How will you know whether you achieved the desired impacts? If you have done a good job of defining them, all you need to do here is describe the information you will gather to tell you how close you came.

*Ex: Will you keep records of ESL/Dual Language books checked out/used? Will you reconnect with the families/students who participated in the program six months after they leave to ask how they are doing?*

## **Explain who will gather the evaluation information and how you will use it.**

Be sure your evaluation plan is achievable given your resources. If the evaluation will cost money, be sure to put that cost in the project budget.

The information you collect will also be invaluable when you complete your **Final Report to the Funder.**

## **Budget**

You will need to show your budget - both your revenues and expenses (not the school's budget, but your budget to deliver the program). How much will/does the program cost?

**EXPENSES** Use High Level line items such as:

- Coordinator fees
- Student Transportation
- Supplies & Equipment

**Note:** Be sure to add up all your expenses carefully. Incorrect addition on budgets is one of the most common errors in a grant proposal.

**REVENUE** All income REVENUE for a project fits into two categories:

- Cash (money from funders, etc)
- In-kind

**In-kind contributions** are gifts of goods or services instead of cash. They can include donated space, materials or time.

Here's a great example of a budget:

**Revenue:**

EducationMatters Grant – space rental/Supplies	\$2,500
Jane Doe (project coordinator) in-kind	\$1,000
Parent Council – teacher aides	\$800

**Expenses:**

Space rental	\$1,500
Supplies	\$2,000
Teacher aides (4 x 40 hours each x \$5/hour)	\$800

(In this example, Jane Doe is doing the work for half-price, while the parents are raising money for teacher aides. EducationMatters is being asked to fund space rental and supplies).

- **It shows all the ways in which the community is supporting your project**, even though not everyone is giving cash.
- **It shows the true cost of the project** -- what you would have to spend without the community support.
- **THE EXPENSES AND REVENUE total up to the same amount.**

## Putting It All Together

*Remember:*

- **We encourage you to contact us (or any other funder) to talk about your application.** We will be candid about the program's fit with our mandate, and the best strategies for writing the application.
- **You should wait until you have all the relevant information BEFORE submitting your application.** No one gets priority if their application is submitted early. They are all reviewed equally.
- **If you MISS THE DEADLINE,** we cannot consider your application at all. This would not be fair to the other applicants.

### Common Questions:

#### ***1. Should I include Supplementary Materials?***

EducationMatters does not want supplementary materials with a grant application...we don't need to see work orders for specialty software, pictures of the musical instruments you're buying, staff lists (but other funders might, so check!)

Some applicants are small parts of very large institutions, such as a school with the Calgary Board of Education. But always submit information about your specific program/school, not the larger organization. IF IN DOUBT ALWAYS ASK THE FUNDER what you should do.

#### ***2. Should I apply for more than 1 grant or to more than 1 funder?***

Few funders want to be the sole support for a project. BUT IT ALL DEPENDS ON YOUR PROJECT/NEED. You should usually apply to multiple funders (if they exist), asking each for partial support.

Go ahead and apply for as many grants as you want, but only one will likely get funded in any given granting round. SO CALL US and we'll advise.

#### ***3. What happens to my proposal after it reaches the grant maker?***

In the case of EducationMatters, the organization screens out proposals that are ineligible or do not fit the organization's mandate/focus. Those that remain are reviewed by the Grants Committee. The grants committee makes final recommendations to the Board. The board makes the final decisions.

In other foundations, staff members make decisions on smaller requests. In still other foundations, the board sees every proposal unscreened by staff.

#### **4. *Should I stay in touch for funding status?***

Most funders prefer that **THEY CONTACT YOU** about the status. And they will contact you AS SOON AS THEY CAN.

### **THIS MIGHT LOOK LIKE A BREAK UP, BUT..... What should I do if my proposal is rejected?**

Contact the funder and ask why? Perhaps they liked your proposal but just ran out of money. But don't make such a call if you are feeling angry or combative. You are trying to get information, not argue a case in court.

If you are rejected, but after an objective review of the funder's feedback you still believe there is a match, apply again next year. Many applicants are only successful on the second or third try.

### **Some applications don't get funded, but are still highly ranked....**

At EducationMatters, we are unable to fund all requests. Many applications are excellent projects, but there just isn't enough money in our existing Funds. **However, if your project has been highly ranked and we think there might be donors in the community interested in supporting it, we will let you know.** Remember though: this is not a guarantee and it will inevitably take time.

Always reconnect with the Funder before the next granting round as some priorities might have changed.

## **COMMITTMENT**

### **Congratulations! Your program/initiative gets funded! Now what?**

In the case of EducationMatters, if your proposal is funded, you will receive a telephone call supported by a letter (with other funders you may get a full-blown contract).

*Remember,* getting funded does not necessarily mean it's for the ENTIRE AMOUNT requested. Read the letter closely to be clear on the amount of funding you will receive and the process for receiving it:

- When receiving funding, it's a good idea to **write immediately to acknowledge the gift** and thank the funder.
- **Sign/return the Grant Agreement** – we cannot issue/cut the check without signed agreement.
- **Read and understand Terms & Conditions**, including any policies about donor contact, communications requests
- If you sign a contract, be sure to note when and **what kinds of reports are due**.
- **The cheque is then deposited into your school's account.** A cheque cannot be issued directly to a school.

## Final Report to the Funder

Every funder, including EducationMatters wants to see a Final Report on your project. This is not simply to make you do more work. We ask for this information because:

- CRA regulations
- Obligation to report back to OUR donors
- To provide next phase funding
- To determine if the program worked
- Celebrate your successes
- Tell your story to our community
- Build a relationship with you for the future

**Before preparing a report for a funder, check to see if the funder has specific reporting forms** and guidelines. **KEEP THIS DOCUMENT IN YOUR FILES.**

**Typically we want to see your report 2 months after the project ends** or the funding is sent out. Then turn the report in on time. If you realize you can't do so, send a note or call to say it will be late.

**Show the funder how well you are using the money.** If your project generates a newspaper article, send a copy. If it includes a public event, invite the funder to attend. If you get heartfelt letters of thanks from participants, send a sampling to the funder. Don't be like the stereotypical college student who only writes home when he needs money.

## Use of Funds

**A grant recipient must spend the money from the Funders as promised.** If you've asked for funds for a Literacy program, you cannot then spend it on athletic equipment. A funder will risk problems with the CRA if they grant money that is not spent accordingly.

**If for any reason, you might need to reallocate your funding, PLEASE CONTACT US** and we'll have an honest discussion about why and what to do. Basically we do NOT WANT TO HAVE TO RETURN YOUR GRANT MONIES. So if you your reallocation is to a different component of the same program, i.e. Literacy program's catering as opposed to the program's coordinator's fee. It is likely we can do this, as long as you give us something in writing, for review by our Grants Committee.

### **Under budget?**

As part of your final report, we will ask for your final budget as well. If you are 'under spent' with a balance remaining, there are several options. You can direct these monies into the continuing of the project (with the Funders permission). Or redirect the monies to a similar initiative (with the Funders permission). Or you will be asked to return the balance.

## **PARTNERSHIP**

**Just like in *Casablanca*... 'this is the beginning of a beautiful relationship'.**

### **Future Funding**

Seeking grant money can be time-consuming and sometimes frustrating. At Educationmatters, about 1 proposal in 5 is funded. So keep trying.

But remember that whether or not you receive funding from EducationMatters, that in applying for support, and staying in contact with our Trust, **you have now developed an important relationship – beyond the grant application.**

### **Community connections**

Calgary has an extraordinary culture of giving. Other communities envy the individual philanthropy, major corporations and foundations here that form the backbone of many innovative social and cultural programs.

### **Links to other donors...**

And if we can't fund your project initially, there is a chance we might find funding after the annual granting round. Or we might be able to point you to another funding source. In our relationships with donors in this community, it is incredibly important to always be aware of the schools and school board and their needs, and most important the needs of the students.

## Other opportunities

We've invited students to speak or give presentations or provide artwork at many of our events. Our grants have helped both the student and their parents. Teachers have enjoyed getting students involved to enhance leadership, civic engagement and student confidence.

We want to keep connected to you and your plans for enhancements for the students. **We can be an important partner, friend, listener, advisor** – as well as just a funder. We can open up your school/community to a bigger audience, bigger world.

And this benefits everyone – ESPECIALLY THE STUDENTS.

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