



Preparing Winning Grants and Proposals



San Francisco Chapter
of the
Society for
Technical Communication


Presented by Judith Herr

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Grant Writing is broadening...


“Whether providing professional consultative services for the entire process; contracting to provide research, writing, editing, and production expertise; or giving pro bono time for a personal cause, grant and proposal writing are career broadening – and even more rewarding when it is a winner!”

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Preparing Winning Grants and Proposals


- Encouraging Exercise: proposal writing and communicators
- Talk the talk – master the language
- Steps to successful grant & proposal efforts
- Best Funders: Win themes and causes
- Proposal preparation
- My “Top 10 Lessons Learned”

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Encouraging Exercise – proposal efforts and technical communicators

- Help Wanted: *Immediate. Requires stamina; ability to read, write, spell, correct; organize/coordinate/manage communication-related project. Detail-oriented; retain equanimity/enthusiasm in panic atmosphere; may require occasional ‘odd’ hours*
- And... knack for quickly mastering new technical material and comprehending technical experts -- and adopting the lingo

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Talking the talk – mastering proposal team language and behavior

- Grants vs. proposals – same only different
 - Development specialist; or acquisition manager
 - Grant or contract award
 - Business driver or the “cause”
 - Corporate capabilities or the agency mission
- Requirements driven outline; “show-stoppers?”
- *Acronyms, acronyms, acronyms...* GSA, NGO, RFP, (Federal, state, agency-specific, scientific, technical)
- Win themes; “answer the mail”; “breadth and depth,”

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Steps Toward Winning: “Writing is only part of the effort”

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Step 1: Evaluate the idea & ability to implement [Grants]

- Develop materials to tell the story passionately; prepare short summary of project/ services offered
- Write need statement – why this project?
- Determine if the organization/company can accomplish the project – why us?
- Look at anticipated benefits against rough estimate of costs – is it worth doing?

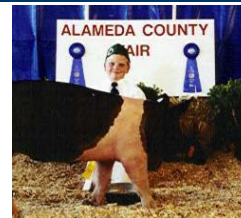
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Telling the story – pictures help



- Sponsor: Cooperative Extension USDA
- Goal: Develop citizenship leadership, life skills through experiential learning programs. ...
- 4-H = Head, Heart, Health, Hands

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Tell the Story: Demo Work in Plaquemines-- "Arise and Rebuild"



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System architects & inner city students trade insights



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Exercise: "First Questions First"

1. What is the value of your idea or your services? Does it capture interest?
2. Does the project solve an important problem? Who does it benefit?
3. Is solution timely, innovative, engaging?
4. Who in the organization/company will contribute to the proposal process?

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Step 2: Find the "Best Fit Funder"

"The secret to writing successful grant proposals these days is being connected – not to insiders at funding agencies, but to people in your own organization and to resources on the Web."

Steven Wilbers
Volunteers, staff, Board members – not just dedicated development person.

Scott Ullman

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Targeted Search for a Funder: Show Me the Money

Virtually

- The Foundation Center : digital grant directories; online training: <http://foundationcenter.org>
- Minnesota Council on Foundations; National Science Foundation
- Community Technology Foundation of California

Face-to-face Research Too ...

- Network: clients, vendors, neighbors, peers
- Volunteers invested in the cause or mission

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Research: Foundation Center Directory Online

- Visit the Foundation Center Library in San Francisco for free access to database and library 312 Sutter, Suite 606
- Classroom training courses and 1-day workshops offered frequently
- "...The Foundation Directory Online is ... resource for comprehensive, accurate information on grantmakers and their grants"
- http://foundationcenter.org/marketplace/catalog/product_fdo.jhtml?id=prod20002

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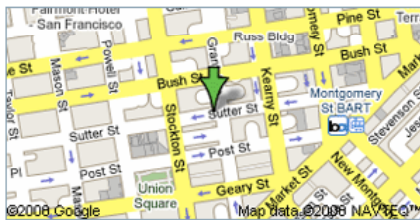


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Foundation Center – San Francisco



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Step 3: Get Ready: Writers, Cheerleaders, Win Themes

- Build supporter excitement – brainstorm “win themes”; dream of winning
- Gain visibility – newsletters; events; PR
- Seek opportunities to communicate with potential Funder – draft an Advocate
- Prepare schedule; hold kickoff meeting; cast of 1,000s

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Exercise – Guiding the Client... Win Themes and the Cause

Brainstorm 3 sentences on why the project should be funded – why it's worthy; why the right people will be doing the work; who/what will benefit?

Brainstorm 3 sentences explaining why the organization can be trusted. Its track record for achievement. Worthiness of the cause/mission.

Gently explain how this project is different from work other groups in the same region are doing on similar issues – and how you could collaborate with them

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Step 4: Draft, revise, rewrite, review, submit the proposal content

Completed application

Cover letter

Executive Summary

Narrative

Budget

Supporting Material

Narrative

- Statement of need

- Approach

- Method of Evaluation

- Project Timeline

- Key Personnel quals

- Why Us – the hook to the Funder

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Step 4: Hints for getting the grant proposal out the door on time

1. Emphasize firm deadlines for completion
2. Establish team communication processes
3. Add graphics, tables, design elements to illustrate text, re-enforce win themes
4. Monitor and enforce version control
5. ****Draft profiles for proposed project manager and key personnel early**

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More Hints – Out the Door

1. Prepare final draft in approved format
2. Prepare cover letter for signature
3. Arrange for detailed edit of final text
4. Perfect final graphics
5. Test print final version – even if to be delivered electronically – they will print it
6. Arrange for delivery per grant instructions

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Step 5: Follow through

Waiting for the Verdict

- Rejection?
- Request feedback
- Acceptance? **CELEBRATE!!!**
- Thanks to Donor; publicly recognize the Gift
- The next grant?



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My Top 10 List of “Lessons Learned” – Grants and Proposals

1. Connect with funder’s program officer – inquiry letters; telephone; milk Board/volunteer contacts
2. Follow all grant instructions exactly; continuously update compliance checklist
3. Line up all resources before plunging in
4. Keep proposal team happy & well fed
5. Collect 24X7 contact information

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Proposal Team at Work: Virtual Too



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Managing Winning Grants and Proposals ...Virtually

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My Top 10 List of “Lessons Learned” (cont.)

6. Identify the project’s proposed staff early
7. Edit continuously; accept substantial changes graciously or at least tactfully
8. Know when it’s time to give up perfection for “good enough”
9. When scheduling, inflate time required for production and delivery
10. Recruit “good” Review Team leader

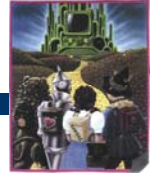
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Setting out ...



Before beginning a long and arduous journey...

- The prudent traveler
- The less meticulous traveler
- The desperate traveler – bold, vulnerable, and determined

Even the Stars Look Lonesome, Maya Angelou

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You have a brain , a heart, and courage my friends -- and the expertise



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Selected Web Sites and References

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Comments, suggestions, follow-up questions?

Contact me at...

Judith M. Herr
Well Chosen Words

herri@comcast.net
Well Chosen Words
925-443-4514
<http://www.wellchosenwords.biz/>

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hereby granted to

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the STC San Francisco Chapter
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By Judith M. Herr.

