



Eric H. Milliken
Attorney At Law

2425 Porter Street, Suite 15, Soquel, California 95073
(831) 272-2482 ~ Eric@Ericmilliken.com ~ Ericmilliken.com

Guide to grant writing and fundraising

By Eric H. Milliken
Attorney At Law

This guide was written specifically for the non-profits organizations; however the principals for writing a grant are universal for every organization from the smallest non-profit to the largest multinational corporation. This grant writing kit is only an example, each grant is unique and one must address the particular questions posed.



Eric H. Milliken

Attorney At Law

2425 Porter Street, Suite 15, Soquel, California 95073
(831) 272-2482 ~ Eric@Ericmilliken.com ~ Ericmilliken.com

Index:

Section 1:

- **Suggestions for grant writers**
- **Sample cover sheet**
- **Sample cover letter**
- **Sample budget**
- **Examples of grant proposals**
 - <http://www.npguides.org/index.html>

Section 2:

- **Non-Grant Fundraising Suggestions**
- **Grassroots fundraising news letter**
 - <http://www.grassrootsfundraising.org>

Section 3:

- **Funding sources**
 - <http://foundationcenter.org/findfunders/foundfinder/>
 - <http://www.alliancefor nonprofits.org/program.html>
 - <http://www.excessaccess.com/>
 - <http://www.ireuse.com/index.aspx?ba=1>
 - www.cfmco.org
 - <http://montereypenencilafoundation.org>
 - <http://www.changingthepresent.org>

Section 4:

- **Weathering the storm**
 - <http://www.afpnet.org/>



Eric H. Milliken

Attorney At Law

2425 Porter Street, Suite 15, Soquel, California 95073
(831) 272-2482 ~ Eric@Ericmilliken.com ~ Ericmilliken.com

Section 1:

How to Write a Grant:

Grant writing has a reputation for being a complex and time-consuming task; however, it does not have to be. The purpose of this packet is to take the mystery out of the process. We have broken down the grant writing process into a step-by-step format in order to make this task less daunting.

A successful grant involves solid planning, preparation, coordination, planning research and organization. In order to save time and energy the best grant writer will target the most compatible grantmaker. We have compiled a list of some of the grantmakers in the area. Before starting, be sure to read the objectives of the grantmaker in order to determine compatibility. There are steps listed below that can help you along the way to your funding goals. We have also included a sample cover sheet, sample cover letter, sample budget and a model proposal formatted specifically for the Monterey Peninsula Foundation; this format will not be universal for all grants however, it can be used as a guide for other grantmakers.

Objectives to focus on when writing a grant proposal:

- Show that you have a specific problem, and demonstrate that your organization can solve that problem, be logical, systematic and realistic.
- Always cover the following important criteria: project purpose, feasibility, community need, funds needed, applicant accountability and competence.
- Research the grantmakers goals and objectives; (make sure you are eligible before you spend time and energy writing a grant)



Eric H. Milliken

Attorney At Law

2425 Porter Street, Suite 15, Soquel, California 95073
(831) 272-2482 ~ Eric@Ericmilliken.com ~ Ericmilliken.com

- Demonstrate project logic and outcome, impact of funds, and community support. Be specific about broad goals, measurable objectives, and quantified outcomes.
- Answer these questions: Who are you? How do you qualify? What do you want? What problem will you address and how? Who will benefit and how? What specific objectives will you accomplish and how? How will you measure your results? How does your funding request comply with the grantmaker's purpose, goals and objectives?
- Target your grant to the specific grantmaker, as stated above make sure you are eligible.



**Eric H. Milliken
Attorney At Law**

**2425 Porter Street, Suite 15, Soquel, California 95073
(831) 272-2482 ~ Eric@Ericmilliken.com ~ Ericmilliken.com**

SAMPLE COVER SHEET

Date:

(legal name): Save the World Foundation (“SWF”)

Purpose of grant (one sentence): SWF will use Monterey Peninsula Foundation funds to combat global warming by: (briefly state how you plan on using the funds)

Address of organization:

Telephone number: 831-555-5555

Executive director: Tricia Treehugger

Fiscal Sponsor: Save the World Foundation *an IRS 501(c)(3) not-for-profit*

Grant request: \$25,000

Total organizational budget (for current fiscal year): \$1,000

Budget Period (mo/day/year): February 1, 2009 - through December 31, 2009

Total project budget (if requesting project support): \$25,000



**Eric H. Milliken
Attorney At Law**

2425 Porter Street, Suite 15, Soquel, California 95073
(831) 272-2482 ~ Eric@Ericmilliken.com ~ Ericmilliken.com

SAMPLE COVER LETTER

Date

Name, Title (Grantmaker Contact)
(Grantmaker Name)
Address
City, State, Zip Code

RE: Name of Grant

Save the World Foundation (“SWF”) is pleased to submit this request for your review. We look forward to your partnership in our cooperative efforts to save the world.

We are requesting \$25,000 to expand our tree planting campaign in order to counteract the effects of global warming.

Our tree planting campaign has been widely excepted in and very successful in the greater Monterey area. The Carbon Neutral Grant would give us the opportunity to continue our work throughout the community.

We have secured \$1,000 funds to seed the program, we have over 100 volunteers that are willing to plant trees upon request.

For the last eight years SWF has been very successful. We have planted over 10,000 trees in the greater Monterey area. With your support we hope to expand the program and plant over 10,000 more trees this year, resulting in the removal of over 50,000 tons of carbon form the atmosphere.

We envision building upon our collaborative success by expanding our tree planting program with your funds.

Sincerely,



Eric H. Milliken Attorney At Law

2425 Porter Street, Suite 15, Soquel, California 95073
(831) 272-2482 ~ Eric@Ericmilliken.com ~ Ericmilliken.com

(Name of CEO/Board Chair)
(Title of CEO/Board Chair)

SAMPLE BUDGET

Most grantmakers will request both a general operating budget and special project budget (if applicable). Budgets are cost projections. They also show the funder how your project will be implemented and managed. Good budgets reflect carefully planned projects. This sample is a very simple budget that was developed for a private nonprofit foundation. Most government grants will require a much more in-depth budget.

This is a sample general operating budget.

I. INCOME		II. EXPENSE	
SOURCES	AMT	USES	AMT
Revenue		General Operating Support	
Government grants & contracts		Salaries & Fringe Benefits (for project budgets detail each position to be funded)	
Banks & Foundations		Salaries, Fringe & OTPS	
Earned Income		Salaries, Fringe & OTPS	
Fundraising		Insurance & taxes	
Donations		Consultants & professional fees	
In-kind support		In-kind expenses	
I. TOTAL INCOME	\$	II. TOTAL EXPENSE	\$
Detail OTPS Expenses		Subtotal OTPS Expenses	\$
Banks & Foundations		Equipment	
Earned Income		Supplies	
Earned Income		Printing & copying	
Earned Income, Banks & Foundations		Telephone & fax	



Eric H. Milliken
Attorney At Law

2425 Porter Street, Suite 15, Soquel, California 95073
(831) 272-2482 ~ Eric@Ericmilliken.com ~ Ericmilliken.com

Earned Income, Banks & Foundations		Postage & delivery	
Earned Income		Rent & utilities	
Other Income (specify)		Other Expense (specify)	
Other Income		Other Expense (specify)	
Other Income		Other Expense (specify)	
I. TOTAL INCOME	\$	II. TOTAL EXPENSE	\$
		NET INCOME (income less expense)	\$



Eric H. Milliken

Attorney At Law

2425 Porter Street, Suite 15, Soquel, California 95073
(831) 272-2482 ~ Eric@Ericmilliken.com ~ Ericmilliken.com

Section 2:

Non-Grant Fundraising:

Fundraising is a difficult process, which has become made more difficult over the past year. Grants are a great source of funding a non-profit; however, in hard economic times like this competition will be increasing for the limited funds being offered by grant makers. This does not mean you should give up, it means that you may have to change your tactics. Keep an open mind, the source of funds does not matter as much as the good your organization can do with the funds. We have compiled a list of possible sources of funds.

- Don't be afraid to ask friends and family for donations
- Maintain a list of all past donors and periodically send out mailings request for donations
- Door-to-Door canvassing can be a good source of funds; it can be a bit daunting at time and be prepared for rejection. (See the enclosed article)
- Ask for goods, sometimes non-profits are so caught-up in finding funds they forget what they want them for, sometimes it is easier to ask a business for to donate an item, such as food or clothing etc.
- Fundraising events can be a good source of income, however be very careful, these event are notorious for losing money. Whenever possible make sure the venue is free, and try not to spend money unless you are sure that you will recuperate the fund expended.

A good source for alternative fundraising information is The Grassroots Institute for Fundraising Training (“Gift”). They have a free publication of the Grassroots fundraising Journal, and other recourses that may be a great help.

“The Grassroots Institute for Fundraising Training (GIFT) is a multiracial organization that promotes the connection between fundraising, social justice and movement-building. We believe that how groups are funded is



Eric H. Milliken
Attorney At Law

2425 Porter Street, Suite 15, Soquel, California 95073
(831) 272-2482 ~ Eric@Ericmilliken.com ~ Ericmilliken.com

as important to achieving their goals as how the money is spent, and that building community support is central to long-term social change. We provide analysis, training, and resources to strengthen organizations, with an emphasis on those focused on social justice and based in communities of color.”

<http://www.grassrootsfundraising.org/>



Eric H. Milliken

Attorney At Law

2425 Porter Street, Suite 15, Soquel, California 95073
(831) 272-2482 ~ Eric@Ericmilliken.com ~ Ericmilliken.com

Section 3:

Funding Sources

Foundation Center:

Foundation Finder offers basic information on grantmakers in the U.S. including private foundations, community foundations, grantmaking public charities, and corporate giving programs. Search by grantmaker name—including former, partial, and common names. Search by geography to identify grantmakers in a given city, state, or zip code

- <http://foundationcenter.org/findfunders/foundfinder/>

Alliance for Non-Profits:

Has a plethora of sources for funding, grant writing etc.

- <http://www.alliancefornonprofits.org/program.html>

Excess Access:

They link donations of business and household items / materials with the wish-lists of nearby nonprofits that can provide pick-ups or accept drop-offs. "Together we're keeping useful goods out of over-flowing garbage dumps. It's great for charities and the environment!"

- <http://www.excessaccess.com/>

iReuse:

iReuse gets nonprofits the stuff they need for free. Business and residential clients hire iReuse to facilitate the removal of their unwanted items. Instead of taking these items to be recycled or disposed of, they find new homes for as much as possible. They often obtain new or like-new items, and it is a priority for us to get them back into the community. They charge their clients a discounted rate to get rid of their items, which allows us to provide items to nonprofits for free.

- <http://www.ireuse.com/index.aspx?ba=1>



Eric H. Milliken Attorney At Law

2425 Porter Street, Suite 15, Soquel, California 95073
(831) 272-2482 ~ Eric@Ericmilliken.com ~ Ericmilliken.com

Community Foundation of Monterey County:

There mission is to improve the quality of life in Monterey County by raising, managing, and distributing charitable funds to qualified organizations and by creating positive connections between donors and their interests.

- www.cfmco.org

Monterey Peninsula Foundation:

The Monterey Peninsula Foundation enhances the quality of life in Monterey County and surrounding areas through strategic disbursement of charitable funds generated by hosting the AT&T Pebble Beach National Pro-Am and the Walmart First Tee Open at Pebble Beach.

- <http://www.montereypeninsulafoundation.org/>

Changing the Present:

It cost \$100 a year to register for there website; a donor can browse by cause to find gifts that make a difference, or [search](#) for their favorite nonprofit to make a donation. “Changing The Present helps nonprofits raise awareness and raise money by making charitable giving more convenient, cost-efficient, and rewarding than ever before.”

- <http://www.changingthepresent.org>



Eric H. Milliken

Attorney At Law

2425 Porter Street, Suite 15, Soquel, California 95073
(831) 272-2482 ~ Eric@Ericmilliken.com ~ Ericmilliken.com

Section 4:

Weathering the Storm

In these uncertain economic times, fundraising will become a challenging for even the most successful non-profit. It is a fact that corporate profits are hitting record lows; this means that they will be less willing to donate funds to non-profits. However, this is not a time to panic; we have developed a list of strategies that may help your non-profit weather the storm of economic uncertainty. We have also attached an article by Derrick Feldmann that may be a helpful resource.

Strategies:

- Understand the current financial data, don't make unrealistic goals.
- Much like a for-profit organization, expect a reduction in short term growth expenditures to gain increased long-term growth.
- Develop messages, themes and scripts around why we need our donors now more than ever and offering downgrading to payment holidays for donors who might otherwise give or who may cancel their gifts.
- Strengthen current partnerships rather than looking for new ones.
- Invest time, intelligence and money to improve the donor experience. Remind donors that they are wanted, needed and appreciated.



Eric H. Milliken

Attorney At Law

2425 Porter Street, Suite 15, Soquel, California 95073
(831) 272-2482 ~ Eric@Ericmilliken.com ~ Ericmilliken.com

Section 5:

Weathering the Storm

By Derrick Feldmann

(Jan. 26, 2009) During tough economic times, organizations often take two approaches. Some hunker down and wait for the storm to pass. Others step up efforts and bring donors in.

Which will be best positioned when the economy turns? The ones that take the proactive approach. How do you do that, especially in the current economic landscape? By following three simple strategies for donor relations:

Be Proactive. Don't hide in hard times. Get out and meet with your donors to describe the challenges the organization faces in the current economy. During those meetings, be candid about the realities of your situation, but also describe specific strategies your organization will execute to meet the needs in the community. Be forthright and focus on tangible, specific solutions.

Before you leave meetings, let the donors know how you'll keep them informed of progress (phone, meetings, reports, etc.). They are stakeholders to the organization; treat them that way. It's in your best interest and theirs that they are informed. Often, you'll find that donors will step up and support the organization during difficult times if they understand your strategy and plan.

Seek Their Counsel. You can bet this is not the first time your donors have witnessed troubling times. Use this as an opportunity to seek their counsel on how the organization will withstand a tough economy. Donors like to be on the inside and want to see organizations succeed.

Therefore, as you visit with your major donors, ask their opinions on the strategies the organization has set forth during this time. Ask about how they've weathered storms in their business and professional lives. Listen, take notes, and discuss the strategies with the organization's leadership. Invite your major



Eric H. Milliken Attorney At Law

2425 Porter Street, Suite 15, Soquel, California 95073
(831) 272-2482 ~ Eric@Ericmilliken.com ~ Ericmilliken.com

donors to an executive staff meeting and ask them to suggest solutions. Make it a point to return to the donors and provide feedback on how you used their advice. Always continue the conversation by setting up meetings for other opportunities in the future to discuss the strategies.

Communicate. Candid communication with donors will yield long-term success. After you have sought their counsel and described the challenges and the solutions, continue the dialogue. This is an opportunity to make donors feel as if they are working side by side with you. Schedule phone calls and visits, and send updates to donors on a regular basis.

Think about developing a special report that describes the challenges and lists the strategies. On a monthly or quarterly basis, under each strategy list the tactics and the progress made. This paper version of an organization dashboard to deal with the economy will provide your donors with an ongoing snapshot of the successes the organization has made. For donors below your major gift threshold, continue to communicate via your Web site, in newsletters and with calls.

Remember: It's your attitude and proactive approach to economic challenges that will yield long-term success. Bring your donors in and let them help you weather the storm. Not only will you likely get some good counsel, but you might be surprised by how these simple strategies yield the gifts you seek.

Source:

- <http://www.afpnet.org>