



Adjusting Your Mindset for Successful Grant Writing Today

Presented by: Carolyn M. Appleton
Thursday, April 1 | 2:00-3:00 p.m. EDT



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Feel free to ask questions! Use the questions box to the left to ask your questions: we'll answer them in a Q&A section at the end of the presentation.

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CAROLYN'S BACKGROUND

- Thirty years of hands-on nonprofit fundraising experience in higher education and with nonprofits in the arts, environment and social services across Texas.
- Two degrees from The University of Texas at Austin, elected to The Honor Society of Phi Kappa Phi and still an active member today.
- Launched Carolyn's Nonprofit Blog in 2011 – more than 100 nations visit annually.
- Initial training with The Grantsmanship Center, supplemented by continuing education via AFP: Association of Fundraising Professionals, NTEN: Nonprofit Technology Network and more.
- Lead volunteer organizer of Nonprofit Tech Club Austin (since 2015) in partnership with NTEN, NetSquared (TechSoup) and Capital Factory. *Anyone can join – we are on Facebook and Zoom!*
- Elected member of Daughters of the American Revolution, Chair of the Literacy Committee of the Austin Colony Chapter.
- Independent nonprofit fundraising and communications specialist based in Central Texas working statewide and beyond. Qgiv advocate.



ADJUSTING YOUR MINDSET FOR SUCCESSFUL GRANT WRITING TODAY

What is “Grantsmanship?”

“Grantsmanship is a philosophy, a code of ethics, and a set of skills that, when practiced together, produce positive change. Grants are about much more than your organization’s bottom line. Grant proposal writing is a form of social advocacy and is, at its heart, about making positive change.”

The Grantsmanship Center

REALITY

- Fundraising professionals are hired to identify and secure funding in the form of grants from a variety of sources, each prospect with their own protocols.
- Adequate time is often not provided to properly orient fundraisers about the mission, goals and needs of their nonprofit organizations – let alone to get to know fellow staff members. #Mistake
- The best fundraisers take their nonprofit causes to heart. They are inspired by the mission and achieving goals, not just the “bottom line.”
- Executive directors often fail to understand it takes time to fully learn about an organization, to develop loyalty, and thereby to become fully engaged and successful with grant research and writing.
- The high minded, big picture definition of grantsmanship is lost in the mix.



TIMES HAVE CHANGED

- Competition for grant funding is intense and shows no signs of easing.
- Urban Institute (2018), *“From 2005 to 2015, the number of nonprofit organizations registered with the IRS rose from 1.41 million to 1.56 million, an increase of 10.4 percent.”*
- We know during COVID-19 some nonprofits have closed – or will have to close and/or merge with others (firm data should be available soon).
- National Council of Nonprofits (November 2020), *“Many nonprofits have not been able to fundraise at the same level, due to a mixture of cancelled or scaled back events, people holding their money closely for fear of what may be ahead for them, and donations being directed or redirected to pandemic- and disaster-related causes.”*
- The pressure on fundraising professionals remains fierce.

ADJUSTING YOUR MINDSET: MANAGING UPWARD

- I find the process of identifying a prospective donor, researching them, submitting a written proposal and hearing back from the prospect can take 6 months to a year or more.
- Some nonprofit executive directors have little or no patience for waiting that long.
- Nonprofit grant professionals need to learn how to, “manage upward.”
- *“Essentially, to manage upwards means: managing your leadership and doing what it takes to make their job easier.”* – Aventi Group
- What’s involved: think like your boss; build strong allies in the organization; be bold, take smart risks; own your mistakes; touch base regularly; get ongoing performance feedback; and more.
- Keep leadership informed about the time required for grants from the start of research to receiving a response to a proposal.

TURNOVER

- It is no surprise given the pressure involved in fundraising; the failure of executive leadership to understand what grantsmanship is and what it requires; and unrealistic expectations; job turnover is high.
- Benefactor: *"... The average fundraiser stays at his or her job for 16 months before assuming another position. And replacing these professionals doesn't come cheaply - averaging 90% to 200% of their salary in direct and indirect costs, according to the Society for Human Resource Management (SHRM)."*
- My message to Executive Directors: it pays to retain fundraising staff. They are an investment in your nonprofit's future.



YOU HAVE A HAMMER: BUILDING GRANT PROPOSALS FOR SOCIAL CHANGE

New book by Barbara Floersch (2021)

"The sad fact is that many nonprofits are guilty of chasing dollars. Faced with an urgent and continuous need for cash, seeking grants easily devolves into a money-grabbing frenzy. I have met thousands of nonprofit staff members who are instructed by administrators to shake every tree that could possibly throw out a grant dollar."

#BeenThere

See Carolyn's book reviews on Goodreads and Amazon



ADJUSTING YOUR MINDSET: SOURCES OF INCOME

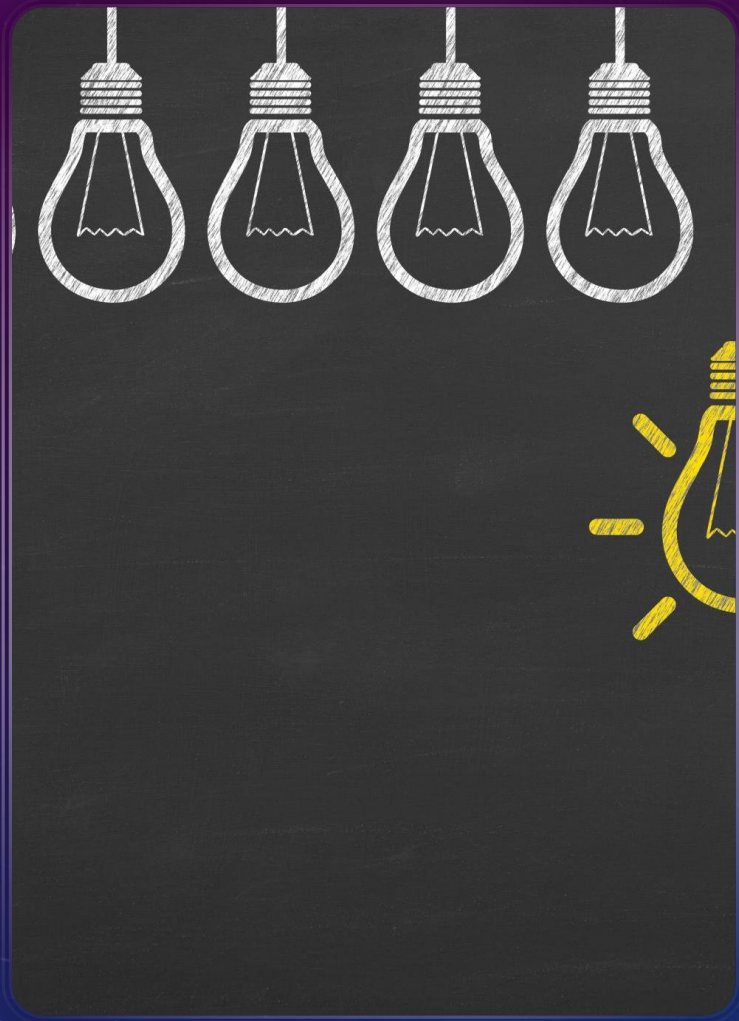
- There are different forms of nonprofit income, not only “grants” as in government grants, corporate grants and foundation grants.
- Additional options might include online fundraising campaigns and events; earned income; unrelated business income (UBIT, like sales of items); corporate promotions; and more.
- “Grants” are not necessarily the answer to every nonprofit financial need.
- Creative thinking when it comes to income generation will keep your nonprofit from focusing overly much on traditional “grants.”

Inspiration:

“Chambord 1519-2019: The Renaissance”

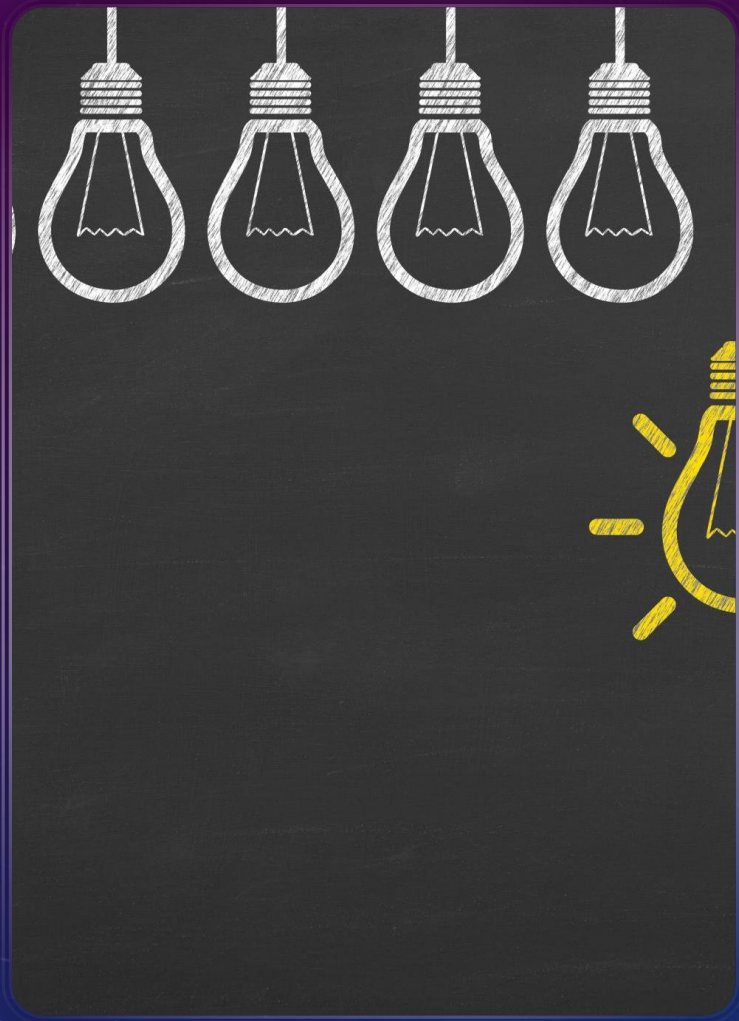
Documentary film on Tubi





ADJUSTING YOUR MINDSET: MARKETING ADVICE

- Nonprofit marketing experts have pushed for “storytelling” and creative writing to attract and hold the attention of prospective donors.
- Their advice is everywhere online. Fundraisers sometimes confuse marketing advice with trustworthy grant writing advice.
- Startup and new nonprofits often fall prey to marketing advice, especially those headed by younger generations.
- This is in part because they view the image of “nonprofits” as somewhat weak. They prefer a bold, more modern image of solving social challenges with a business mindset, “pitching” their solutions and more.



ADJUSTING YOUR MINDSET: MARKETING ADVICE

- Writing well and catching and holding attention are good ideas for grants, too!
- But my experience with donors – given the ever-increasing number of grant seekers – is being concise and getting to the point in your proposal is essential today.
- Too much “storytelling” can derail your proposal.
- Online grant application forms seem to be providing less space for sharing information over time.
 - As an aside, if I need more space to explain, I include a shortened URL to a separate page online where more information can be found.
 - Links I have used are to such outside sources as SlideShare, ISSUU, and private website pages (non-menu, but public).

ADJUSTING YOUR MINDSET: KEEP GOING

- Keep researching prospective donors – never stop.
- Continue to submit grant proposals, more than you need for any given project (e.g., if you need \$100,000 then you might research and submit \$300,000 in grant requests).
- If you receive more than is needed, work with staff to see how the project might be improved and expanded, then report back to the donor.
 - Ask the donor if you can use their grant for the new and/or expanded purpose. Communication with donors is key and will bond them to your nonprofit for the long term.
- If you do not receive all the funding required for a project, the same thing holds true. Ask and potentially, repurpose.

ADJUSTING YOUR MINDSET: KEEP GOING

- Don't "freeze" if you are turned down for a grant. Calendar your application for next year and try again.
- Move past the disappointment to explore other options.
- Tried and true advice
 - Make sure the prospective donor shares the interests and goals of your nonprofit. No "shots in the dark."
- Having said that ... here is some "new concept" advice
 - Do you have an exciting new concept you think the potential donor might like?
 - Ask to see if they might consider the new idea. Never say never.

ADJUSTING YOUR MINDSET: TOOLS NEED NOT BE EXPENSIVE NOR ELABORATE


I have conducted seven figure major gift campaigns using Microsoft Word and Excel. The key is to document where you have been, and where you are going.

A constituent management software platform can be useful in fundraising, if you take the time to learn how to use it (training matters).

Read Carolyn's Qgiv Blog article, *"Fundraising Tools Every Nonprofit Needs"* (2021)

ADJUSTING YOUR MINDSET: YOU ARE NOT ALONE

Ask Board members and volunteers to review your prospective donor list(s). Sometimes they may have information and contacts.



But if not, don't let that stop you from applying.
#KeepGoing

Apply for more
funding than you
need.



If you are turned
down, you can
say: *"We can go
back to them next
year. In the
meantime, I have
several other
grant proposals
still pending for
this project."*



#KeepGoing



Caution: dejected
staff and
volunteers feel
they have failed.
Communicate
carefully to help
them feel like
winners.

ADJUSTING YOUR MINDSET: COMMUNICATING WITH STAFF AND VOLUNTEERS

ADJUSTING YOUR MINDSET: THINGS THAT AFFECT YOUR SUCCESS

- Does your nonprofit have a GuideStar seal for transparency, preferably at the Gold or Platinum seal level? If not, claim your (free) profile. More information is better.
- Is your nonprofit's social media tone and image professional and uncluttered? You or whomever manages social media should routinely do housecleaning. Donors and professional advisors are online conducting research.
 - *"Donors ranked social media as the number one motivator for their charitable gifts in 2020."* - Qgiv
- Reviews by people positively affected by your nonprofit can make a difference in how you are perceived. Ask clients, donors, volunteers and civic leaders to weigh-in, and share their stories on social media. *GreatNonprofits is a helpful resource.*



ADJUSTING YOUR MINDSET: THINGS THAT AFFECT YOUR SUCCESS

- Does your website look professional? Is the information up to date? Can donors and professional advisors easily find your history, mission, staff and Board member lists? Is there a link to GuideStar and the like?
- Do you have an online gift processing platform in place? Have you and your bank enabled ETF: Electronic Transfer of Funds? Many grant makers prefer this, including donor advised funds.
- These simple measures tell an important story: your nonprofit is on top of its game; you can handle significant grant awards; and you serve a genuine need, one the community appreciates.
- You may need to address these issues before applying for a grant, otherwise, your hard work may be in vain.



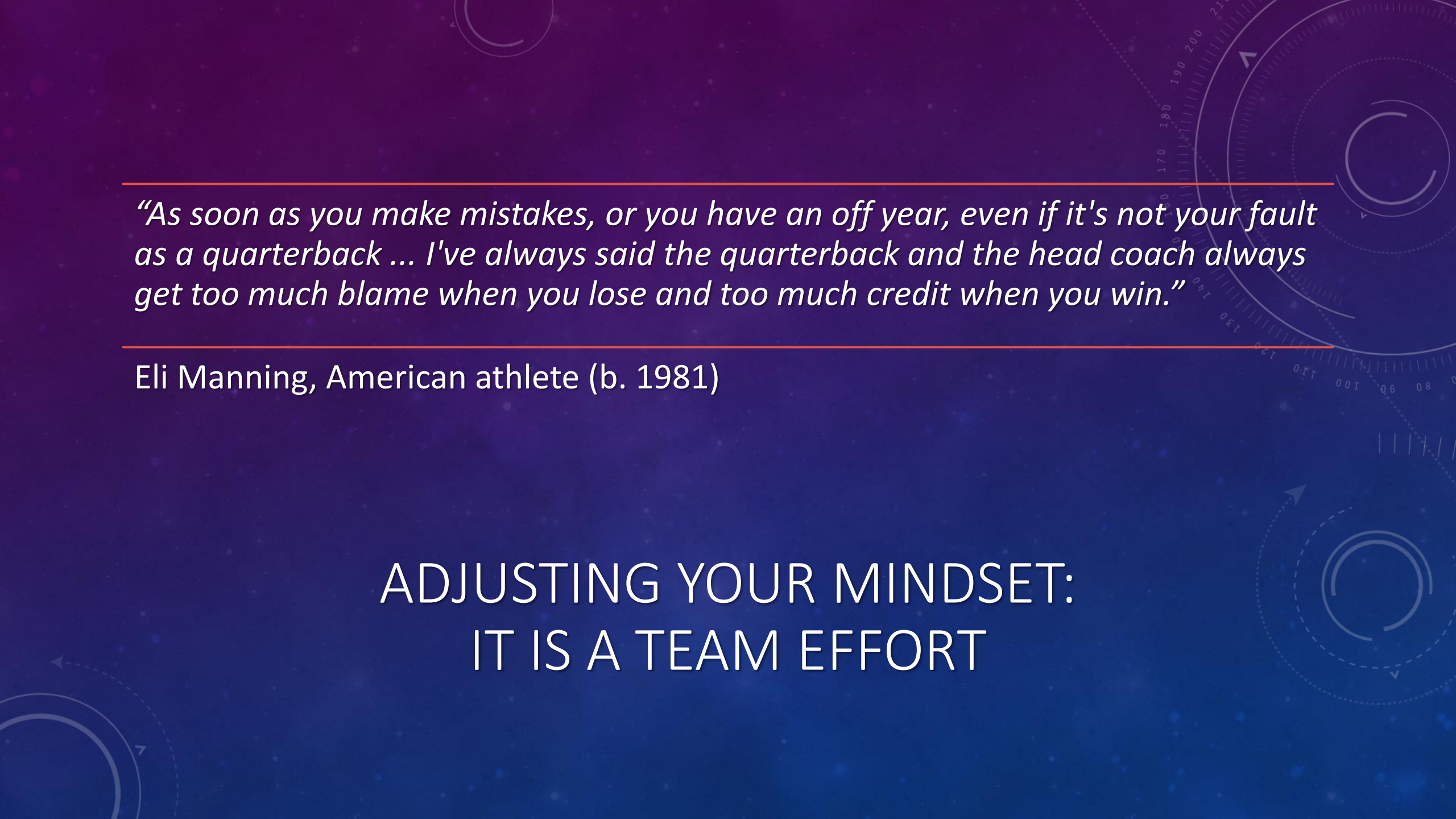
New from Qgiv
*“Navigating the Unknown: 2020 Findings to
Future-Proof Your Fundraising”*

ADJUSTING YOUR MINDSET: ETHICS

“It's useful to adopt a set of principles to guide a nonprofit organization's decision making and activities, as well as the behavior of its employees, volunteers, and board members. These principles could be called a 'code of ethics,' but they might be called the nonprofit's 'statement of values' or 'code of conduct.'”

- *Financial transparency*
- *Honest and accurate communications*
 - *Timely reports to donors*
- *Respect for gift restrictions and donor intent*
 - *And more!*

National Council of Nonprofits, “Code of Ethics”
(templates also available for diversity and inclusion statements)
Nonprofit Hub also provides help regarding privacy policies



“As soon as you make mistakes, or you have an off year, even if it's not your fault as a quarterback ... I've always said the quarterback and the head coach always get too much blame when you lose and too much credit when you win.”

Eli Manning, American athlete (b. 1981)

ADJUSTING YOUR MINDSET:
IT IS A TEAM EFFORT

ADJUSTING YOUR MINDSET: TAKE CARE OF #1

No matter what is going on with your nonprofit organization, take care of yourself. Consider:

- Continuing education including learning how to use new technologies.
 - Choose reputable course providers, ones that document your participation like The Grantsmanship Center, GPA: Grant Professionals Association, NTEN: Nonprofit Technology Network, TechImpact and TechSoup.
- Volunteering for other nonprofit causes can also broaden your knowledge, contacts and experiences.
- Networking with peers – there is nothing quite as therapeutic as sharing experiences and being heard by someone who understands.

ADJUSTING YOUR MINDSET: TAKE CARE OF #1

No matter what is going on with your nonprofit organization, take care of yourself. Consider:

- Staying physically and mentally healthy.
 - You may think you are *The Most Loyal Employee* by working long hours and eating “fast food” on the go, but this is dangerous to your mental and physical well being.
 - See, “*Dealing With Stress*” on Carolyn’s Nonprofit Blog for discussion and resources.
- If the pressure becomes too great, quietly look for a new job. Having “irons in the fire” is a good thing.
- Do not stay in a toxic environment and risk getting PTSD: Post Traumatic Stress Disorder.
- Recognize “destructive leadership” (See *Nonprofit Risk Management Center*, “*The Dark Side of Leadership*”).
- Nonprofit fundraisers can become enduringly loyal at the expense of their mental health and their careers. Keep your options open.



THANK YOU!

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