Winning a grant takes more than an idea and a funding source. It takes an organization that is well managed, that understands its purpose, and one that utilizes its staff and board efficiently. A successful grant program requires the organization to identify its long and short term goals, the priorities of the proposed project, and the strengths and limitations of its staff and their procedures. A short list of important topics and questions that the organization should address are described below.

Long Term Goals.

- What are the long-term goals of your organization?
- Write down a realistic set of long-term goals.
- How do these goals relate to those outlined in the Articles of Incorporation?
- Do the Articles of Incorporation goals include Permanency Planning, the Prevention of Abuse Through Early Detection and Monitoring, Community Education, Training and Recruitment of Volunteers?
- Can you think of any other goals which should be included in the Articles of Incorporation? Should the Articles of Incorporation be amended?

Short-Term Objectives: The implementation of the long-term goals.

- What procedures, programs, staff, and funds are required to implement the long-term goals.
- Establish your short-term priorities? List the three most important things you would like to accomplish within three months, six months, and one year.

Defining the Direction of Your Organization: Who Are You, and Where Do You Want to Go, and How Do You Get There?

- What population do you serve?
- How do you serve this population?
- Who are the other organizations that you interact with, and how do they impact on your ability to meet your goals?

The Executive Director

- Describe the skills and weakness of the executive director. Is he/she best suited as a fund raiser, supervisor of volunteers, accountant, or supervisor of training?
- What if the executive director lacks the skills to be a fund raiser or grant writer?
- Can the executive director delegate authority or does he/she attempt to control all activities of the organization?

The CASA Staff

- Critically evaluate each staff person’s strengths and weaknesses.
- Does the staff have the ability to serve the population, train and supervise volunteers, develop a fund raising program, and meet the short and long term goals of the organization? What should the executive director and the staff do to resolve any staffing deficiencies?
- Will additional staff improve the efficiency of the organization?
- Describe the group dynamics of the staff. Is there a dysfunctional individual which prevents the group from functioning well? If so, how can the talents of this individual best be used to improve the daily operations of CASA? The Board of Directors.
- Describe the role of the individual members that comprise the board. What role should the board have? Active or passive?
The short grant proposal can be used by itself to solicit individual, corporate, church, or foundation funding. It can also be used as an introduction to a larger, more detailed non-public grant proposal. However, this type of grant proposal should not be sent to a Federal or governmental agency since they normally have their own grant proposal forms.

The information in the short proposal should be broken into short paragraphs, so the reader can easily pick out key ideas and statistics. This will also allow the reader to easily refer back to important parts of the proposal.

The short proposal should be modified to address the particular needs and goals of the funding organization. A standard form may be easy, but it lacks the punch of a letter directed to the specific requirements of the funding organization.

A general outline of the topics to be included in the short proposal are presented below.

- Immediately identify the funding organization, your city, the amount requested, the funding period, and name of your organization.
- Define what permanency planning, your CASA program does, and how the funds will enhance the delivery of this service.
- Cite national statistics to indicate the severity of child abuse and neglect problem.
- Present city-specific statistics to illustrate the scope of the problem on a local level.
- The statistics should be oriented to the type of program (i.e., the “funding needs”) the funding organization has historically supported. For example: If the funding group supports mental health projects, the statistics should emphasize the relationship of child abuse and dysfunctional social behavior.
- Present a short history of CASA: the birth, growth, and development of the CASA program.
- State the number of volunteers you have now, how this volunteer group has grown over the past years, and your goal for expanding the number of volunteers.
- State the number of clients (i.e., the number of parents and children) that your organization has represented during the last fiscal year.
- Describe how the volunteer is trained and the responsibilities of the volunteer in relationship to your goals of permanency planning.
- Summarize the dollar amount of your annual budget and the amount of the grant request in relationship to this budget.
- Include a short list of individuals, corporations, churches, foundations, or government agencies which have recently funded your program. Include dollar amounts.
- Attach to the cover letter, the IRS Tax Exempt 501C3 Status Letter, and any promotional materials or publicity concerning your program.
- Thank the reader for considering your grant proposal.
WRITING THE GRANT PROPOSAL

Preliminary Steps

When talking to the funding source "contact person", ask the following questions to determine the practices of the funding group:

- What type of programs and projects does the funding organization normally support?
- What are the eligibility requirements for the grant-in-aid and is CASA eligible?
- Does the organization require a preliminary proposal? If so, what are the requirements for preliminary proposals? What are the smallest and largest grants awarded by the funding organization?
- What is the evaluation process and criteria by which the grant proposals are reviewed?
- What is the evaluation process, what weight (i.e., the number of points) is given to each section of the grant narrative? [The point value assigned to each section serves as a guide to the length of that section. For example, a section worth ten points should be about twice as long as one worth five points.]
- What are the guidelines for the grant proposal?

If your project meets the criteria of the funding body (i.e., if your project complements the organization's funding goals and needs), ask yourself the following questions:

- Can you meet the deadlines?
- Does your budget fit the range of previous grants?

Make an appointment with the "contact person" to personally discuss your project and get some informal suggestions from this representative. The "contact person" is often eager to help mold an effective program that will meet the funding goals of their organization.

Almost all public granting bodies and some private ones ask for a short preliminary proposal due a month or so prior to deadline date of the final proposal. The preliminary proposal, which rarely exceeds one page, describes the concept of the your project. The purpose of the preliminary proposal is to determine if your project qualifies for consideration. If the proposal interests the funding body, they will ask for a complete proposal and may suggest ways to strengthen your project.

Proposal Content

Title.

- The title should reflect the essence of the project, and how the project relates to the "needs" of the funding organization.
- Choose your title carefully. It will appear at the beginning of your proposal and in all reports and publicity from the granting body.
- The title should be short, direct, and catchy.

Summary.

- Always begin your proposal with a summary of your project.
- The summary should be less than a page;
  should explain who you are;
  should define the need and the scope of the project;
should include the estimated cost of the project; should be written last so as to accurately reflect the proposal.

- The summary is important because some grants go through a multilevel system of evaluation. On the first round, evaluators often consider only a project summary.

Introduction: Explain how CASA and the proposed project meet the "needs" of the funding organization.

- Define permanency planning.

- Describe CASA and what the CASA staff and volunteers do to implement permanency planning.

- Provide statistics about child abuse and neglect in the United States and your state to illustrate the magnitude of the problem. Statistics concerning your city are presented in the Needs Assessment section.

- What "population" does CASA serve? How does the CASA program and proposed project serve this population?

- "Cost Per Client" is the annual cost to provide service to your clients. The CASA cost per client should be compared to the average cost of foster care. These figures illustrate the cost-benefit efficiency of your program as compared to foster care. The cost per client estimates are derived in the budget section of the grant. Refer the grant reader to the budget section.

- Establish the viability of your CASA program. Mention successful grant projects, financial statements, testimonials, honors, commitment and support letters. Include these documents in the List of Attachments and refer the grant reader to the Appendix.

Needs Assessment: Documenting the Need for the Grant Project.

- If you cannot establish need, the grant will not get funded!

- Describe why permanency planning is needed in your city.

- Prove to the grant reader that CASA is uniquely qualified to provide permanency planning.

- Provide statistics about child abuse and neglect in your city to illustrate the magnitude of the problem.

- Documenting need requires specific statements, precise facts, and statistics, not abstract concepts of universal need.

- Use statistics wisely; do not overkill. Statistics should not be included in the grant proposal unless they describe the scope of child abuse in your city and how the proposed CASA project will provide and improve permanency planning.

Goals: The expected results of the project.

- The goals section describes how the project will solve the need and presents the expected results of the project.

- From the granting organization's point of view, the results of the project are what counts.

- Define and list the results you expect from the project.

Level of Effort

- This section presents a short history of CASA: the birth, growth, and development of your program.

- List the goals of CASA as stated in the Articles of Incorporation and describe what CASA has done to achieve these goals. Be concrete!

- Permanency Planning and Monitoring:
- State the number of volunteers actively involved in your program. How has this group grown over the past years. For example: During the 1984-1985 period, the number of volunteers has increased from twenty-five to seventy-five. Or, the number of volunteers has increased three fold between 1984 and 1985.

- State the number of volunteer hours that have been donated during the last year.

- State the number of clients (children and parents) that CASA has served during the last year and discuss the growth of this client group.

- Community Education:

  - State the number of speeches and appearances in the community that you have made during the last year. Include a list of these groups in the List of Attachments.

  - Estimate the number of people your community education program has reached during the past year.

- Training and Recruiting:

  - Describe how CASA volunteers are recruited, selected, and trained?

  - Describe the various facets and length of the training program.

  - Are professionals outside of your organization involved in the training program? Describe their role in the training program and their qualifications.

  - How has your training program grown and improved?

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**Methods: How you intend to implement the goals of the project.**

- Provide a detailed list of what the CASA staff and the CASA volunteers will do to implement permanency planning and accomplish the other stated goals of CASA. Be concrete!

- Describe the Juvenile Court system, the 24-hour Emergency Hearing, the Show Case Hearing, and any other technical facts that the grant reader would need to know to understand CASA and the proposed project.

- Include a glossary of technical and legal terms in the Appendix. A glossary allows the grant reader to easily reference a phrase without having to find the original definition in the grant narrative.

- Include a project organization chart, showing the lines of authority for the project in the List of Attachments.

- Explain how all personnel to be hired for the proposed project will be selected.

- Provide a detailed job description for each major position in the proposed project.

- Explain how CASA volunteers will be recruited and trained. This information may be put in the Appendix to shorten the grant narrative.

- Include a one-paragraph description of the key personnel. This list should include the following:

  Qualifications and professional degrees Talents Training Professional experience

- In the List of Attachments, provide a detailed resume for each important member of the CASA staff. If the resumes are not required by the granting agency, make them available upon request.

- Describe the office space, equipment, and staff necessary to support the proposed project.

- Read the grant guidelines carefully! Do not include any of the above "methods" information unless it is specified by the grant guidelines. If there are no grant guidelines, talk to the "contact person" to determine the practices and requirements of the funding organization.
Include the Training Program Evaluation Sheets in the List of Attachments.

**Budget.**

- The body of the grant and the proposed budget are interactive documents. The budget should substantiate and complement the grant narrative. The figures derived in the budget should be incorporated into the narrative to “tell the story” of the proposed project.

- The proposed budget should include all expected cash costs and all "in-kind" donations (i.e., contributions other than money: hypothetical rent, for example).

- The proposed budget should break down the project costs into the following categories:

  Staff Salaries and Benefits, Program-Specific Costs, Overhead Costs, and Miscellaneous Costs.

- All expense categories should be defined and each line item justified.

- Describe how all estimated expenses were derived.

- The budget should begin with a summary of the project cost categories and the percentage of each relative to the total project budget.

- The project cost categories should include all cash and 'in-kind' contributions.

- The form of the detailed project budget is as follows:

<table>
<thead>
<tr>
<th>Category</th>
<th>Amount</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Staff Salaries and Benefits</td>
<td>$1,000</td>
<td>33.3%</td>
</tr>
<tr>
<td>Program-Specific Costs</td>
<td>$1,000</td>
<td>33.3%</td>
</tr>
<tr>
<td>Overhead Costs</td>
<td>$ 500</td>
<td>16.7%</td>
</tr>
<tr>
<td>Miscellaneous Costs</td>
<td>$ 500</td>
<td>16.7%</td>
</tr>
<tr>
<td>Total Budget</td>
<td>$3,000</td>
<td>100.0%</td>
</tr>
<tr>
<td>Less &quot;In-Kind&quot; Contributions</td>
<td>&lt;$ 500 &gt;</td>
<td></td>
</tr>
<tr>
<td>Projected Cash Cost</td>
<td>$2,500</td>
<td></td>
</tr>
</tbody>
</table>

- The math for all estimated expense items and the table totals should always be double checked!

- "Cost Per Client", the annual cost to provide service to CASA clients, is derived by dividing the total budget by the number of clients that the project will serve over the life of the grant. The CASA cost per client should be compared to the average cost of foster care. These figure should be included in the introduction section of the grant to illustrate the cost-benefit efficiency of your program.

- The budget should specify the number of professional and clerical employees, the annual salaries for each category, the total cost of the entire staff, and the percent that each staff category to the annual salary cost.

- Overhead Cost should include all costs such as rent, office supplies, etc.

- Do not skimp on the budget. Include any cost your organization will have to bear: new equipment, consulting fees for outside experts, health and liability insurance, and travel.

**Appraisal.**

- An appraisal section is normally required in federal grants. Foundation and corporate grant guidelines are not usually as strict.
Describe the appraisal procedures that your organization will use to evaluate and review the progress of the project; and how you plan to evaluate the success of the project.

"Ongoing" appraisals. Ongoing appraisals serve to keep the project on target and help the organization recognize and correct any flaws in the program. Such appraisals are made during the life of the project either by the organization's key personnel or by outside evaluators.

"End" appraisals. A comprehensive review of the project and a set of reports may be required by the funding organization when the project is over. The end appraisal can be conducted either by the project personnel or by external evaluators.

Specify progress and final report dates, if required.

Without effective appraisal procedures no grant will receive federal funding!

LIST OF ATTACHMENTS

The following documents should be included at the end of the grant in a section called the Appendix. The documents in the List of Attachments should match the guidelines of the grant. Be careful not to include extraneous material. Never deviate from the grant guidelines!

-Table of Contents, which lists all the attachments and their page numbers, should be included near the beginning of the grant.

-Include resumes of key personnel involved in the overall program and the proposed project, if required. Make them available to the funding organization upon request.

-Provide a copy of the IRS Tax Exempt 501C3 Status Letter.

-Include a Project Budget. Explain how the estimated expense items were derived. Provide a detailed break down of exactly how money will be spent. Include an annual Operating Budget, a Balance Sheet, and Income Statement for the current fiscal year.

-JUDGES COMMITMENT LETTERS. These letters specify the commitment of the Juvenile Justices to working with and to use CASA on an on-going basis. The letter should specify that the CASA program is an integral part of their efforts to help children. These letters are mandatory for most grants!

-SOCIAL SERVICE ORGANIZATION COMMITMENT LETTERS. These letters describe the commitment of the local Protective Service to work with the CASA. These letters are mandatory for most grants!

-Provide three or four support letters which are written by community leaders and board members to describe their commitment to CASA and the importance of the CASA program to the community.

-Include an Audit, if available. An audit makes CASA look more professional. Many granting agencies will accept the organization's latest tax return as an audit substitute. Get permission from granting agency to make this substitution.

-Enclose promotional materials such as newspaper articles and publicity which illustrate the success and community recognition of your program. Copy and reduce all promotional materials to letter or legal sized paper.

- Provide a list of the organization's Executive and Advisory Boards. Include the titles and responsibilities of the key board members. In your files, have a brief biographical sketch of each board member to illustrate the quality of your board. Make the biographical sketches available to the funding organization upon request.

-Include a Glossary of Legal and CASA Related Terms.

-Enclose an organizational flow chart of the court system and how the CASA program and proposed project fit into the court system structure.

-Provide an organization chart of your organization, showing the lines of authority.

-Include a list of the groups that you have spoken to during the last year, and estimate the number of people your community education program has reached during the last year.
- Include the Articles of Incorporation, if requested.
- Include the Training Program Evaluation Sheets.
- Provide a list of donors and the amounts given by each for the past three years.

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DO'S AND DON'TS OF GRANT WRITING

THE CARDINAL RULE OF GRANT WRITING: NEVER DEVIATE FROM THE GRANT GUIDELINES.

- The grant narrative should be limited to the exact topics required by the grant guidelines.
- The inability to follow guidelines is the major reason why grant proposals are rejected.

According to the contact person at St. Luke’s Methodist Church in Houston Texas, only 20 percent of the total grant proposals received in any funding period actually follow the guidelines.

- Public and private funding organizations normally set up their guidelines as a preliminary screening devise.
- Be careful of overkill. If the granting agency stipulates a one or two page grant proposal, follow their request by describing your organization and project in a brief but clear manner.
- By following the guidelines to the letter of the law, your will insure that your grant proposal will pass the first hurdle and be in favorable position for funding.

Submit grant proposals only to the those organizations that have historically supported social service projects, mental health, and child related programs (such as juvenile delinquency prevention and criminal justice programs).

- Research into the “needs” of the funding organization is ESSENTIAL to the successful funding of any grant proposal.
- Develop a list of funding groups in your city and in your state that support child abuse and neglect projects.
- Develop a list of national organizations that fund child abuse and neglect projects.

Do not assume you know what the guidelines mean if they are unclear.

- Always contact funding organization if you do not understand the guidelines.
- Read the instructions carefully because every set of grant guidelines is different.
- Regardless of location, telephone the “contact” person and attempt to clarify the guidelines.
- If there are no guidelines, conversations with the “contact” person will help you determine what the agency or foundation is looking for and what it wants to support.
- If the granting body has no formal guidelines, use a format which you have used previously and makes your proposal attractive.
- Tailor your grant proposal to the individual granting body. Never use a proposal that was written for another organization.

Personal contact with the funding organization is often as important as the actual grant.

- Personal contact serves to introduce CASA to the “contact” person within the organization. In addition, this introduction informs the “contact” person that you intend to apply.
- If the organization is local, make an appointment to see the agencies “contact” person.

Bring a copy of the rough draft for an informal review.
Mailing the grant proposal and the "follow up."

- Always telephone the "contact person" in the funding body to inform him/her that the grant application has been mailed.

- Always send the grant proposal by certified mail, return receipt requested.

- After receiving the certified mail receipt, telephone the "contact person" to make sure that agency has all the necessary information or if they need more. If the foundation asks for something, get it to them immediately.

- As grant review time approaches, write a letter or personally telephone the "contact" person to bring him/her up to date on the progress of your organization.

- If refused a grant request, write the "contact person" a note thanking him/her for considering you. Ask the "contact person" for the deadline of the next funding period.

- If refused a grant request, telephone the "contact person" six months later. Provide him/her with a brief update on the progress of your program.

Determine when to turn in a grant proposal.

- Categorize the grants according to deadline dates and schedule the grants according to deadline dates, size of the grant, likelihood of funding, etc.

- Some corporations fund on a first come first serve basis. Give these proposals priority.

- In most cases, never turn in an application before 1-month prior to deadline. Things change, the "contact person" may quit, and your grant application may be lost.

Always define and describe technical terms. Never expect the grant reviewer to be familiar with the judicial system.

The CASA authorizing official who signs the grant must always be familiar with the contents of the grant proposal.

- The authorizing official is a legally liable person.

- If questions concerning the grant arise, the staff of the funding organization may contact the authorized official who signed the proposal. If this official is unaware of the contents of the grant, CASA comes off looking incompetent.

In the proposed budgets, always double check figures to eliminate math errors.

Never turn a grant proposal in late or incomplete!

- If the grant is incomplete, or if you lack pertinent information, don't turn it in.

- A bad grant application may create a negative reputation which you may have difficulty overcoming in the future.

Always keep your board current as what grants are pending. You never know when a board member may have a contact with the foundation to whom you are applying.

Always inform the local judges that you are using their commitment letters for fund raising because a foundation may contact the judge about your program.

Be prepared to write the commitment letters for the judges and the social service organization.

Always type grant applications. Never turn in hand written applications.

The corporate funding range is between $1,000 and $5,000. Your first request to a corporation should never be more than $2500. Build us to the higher amount in subsequent years.

A grant might include a 3 year plan. Such a plan might specify the desire to hire a Development Director or outline the number of volunteers and the number of supervisors your organization expects to add during the coming years.