



Using a Simple Grant Strategy

*Presented by: John Bateman,
Founder, Nonprofit Sanity*



**NONPROFIT
SANITY**

SESSION GOALS

- Treat grants as a portfolio
- Build a roster for the next 12–18 months
- Develop a strategy to manage the process
 - Allocate time and resources
 - Identify tools to help



RECAP PAST SESSIONS

- Organizing Programs for Strategic Grant Writing
- Crafting a Common Narrative
- Budgeting for Grants

Past recordings on the [Meeting the Moment](#) webpage



INTRODUCTION: USING A SIMPLE GRANT STRATEGY

Do you apply for grants as you find them, or do you plan ahead? What is your overall strategy? Identify funding opportunities in advance and allocate time and energy strategically to submit stronger applications and increase chances of funding.



FEEL OVERWHELMED? LOST? OUT OF PLACE?



*Photo courtesy of
Gratisography*



SOME COMMON QUESTIONS I HEAR

- How do I
 - research for new opportunities?
 - organize the process?
 - work with others?
 - submit to invite-only funders & DAFs?
- How many do I submit?
- How much money do I ask for?



CREATE YOUR OWN LIBRARY

- Build a library of opportunities – a “watch list”
 - This is a preliminary list of any funders that may fit your mission, whether past, current, or future options.
 - Keep track of any that you research and don’t qualify for.
- Where do I research? How?
 - Free vs. Paid options



SOME PLACES TO RESEARCH

- CCA members – *Memberwire Newsletter*
- Locally sponsored arts & culture events
- Various local nonprofit websites* (not always updated)
- Instrumentl* – free and paid
- Grant Gopher* – free and paid
- Candid Charity Search – free and paid
- Grant Watch – paid only



CREATE YOUR ROSTER / PORTFOLIO

- From your watch list, identify a roster for the upcoming 12–18 months
- Ideal when drafting the org budget in advance
- Organize & Prioritize:
 - The must apply, the should apply, the long shots
 - Identify by name at least 80% of the funders
 - Leave 1–2 “TBD” for flexibility and unexpected opportunities (for example, A4A Fund this year)



THE GOOD, THE UNCERTAIN, THE LONG SHOTS

- The **MUST** apply
 - Current funders plus key gov't funding
- The **SHOULD** apply
 - Funders of orgs similar to you
- The **LONG SHOTS**
 - Always include at least 1–2 of these.
 - What new relationship would you love to win?



INVITE-ONLY FUNDERS & DAFS

- Is a clear query process?
 - Review the website. Don't chase for approval.
 - If no query process, but you build a relationship with a staff member, consider an informal: are you interested in learning about our work?



INVITE-ONLY FUNDERS & DAFs

- Most DAFs do not solicit applications.
 - Some sponsoring charities promote use of Guidestar to their DAFs. Consider updating your organization's profile.
 - Build relationships with the sponsoring charity (usually a community foundation).



HOW MANY APPLICATIONS SHOULD I SUBMIT?

- VOLUME IS NOT A STRATEGY.
- If applying to more funders doesn't win more grants, reevaluate.
- Never create a program to chase a grant.
- Time + Energy?
 - Save time for relationship building.
 - Save time for donors & sponsorships



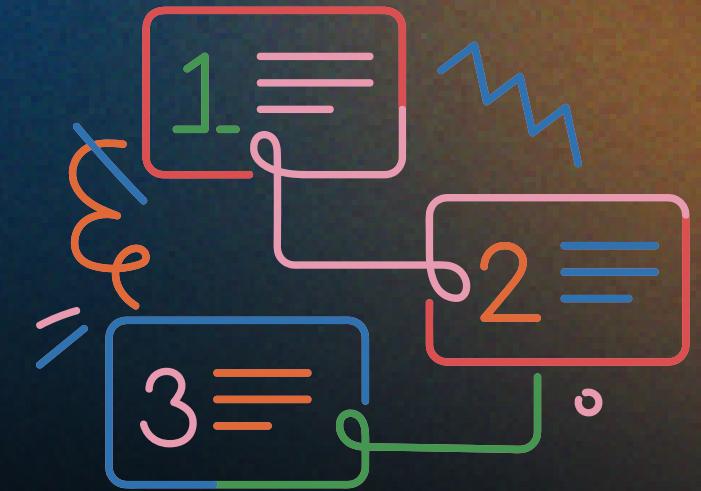
HOW MUCH MONEY SHOULD I SEEK?

- What do you need?
- Ask for all costs allowed.
 - Remember, you may have some costs (like receptions) that many funders will not cover.
- If forecasting future expenses, consider a 5–10% margin for increased costs.

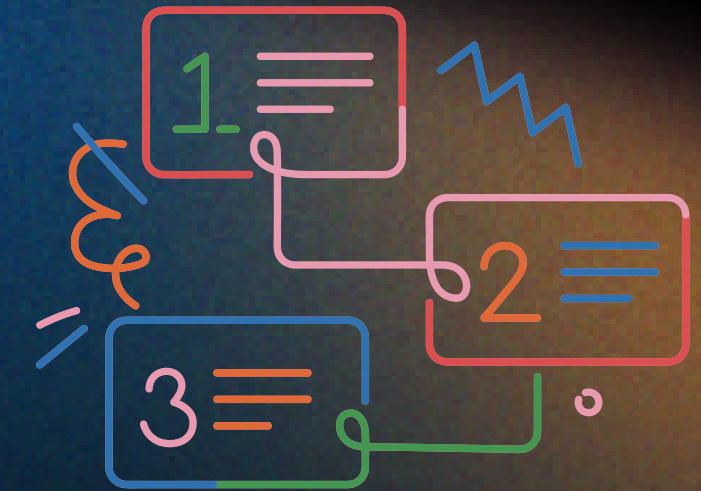


MANAGE THE PROCESS: ORGANIZE & CALENDER

- Identify your roster.
- Calendar dates and create alerts.
 - HINT: include start dates, not just due dates.
- Identify all required documents when drafting.
- Polish the Narrative.
- Update & check annual registrations and filings (SAM.gov, grants.gov, GATA Illinois, Annual state registrations, 990)



MANAGE THE PROCESS



- Tools – find what works for you
 - GSuite (Drive, Docs, Sheets, Calendar)
 - Airtable
- Time and Labor
 - Board vs Volunteers vs Grant Writers
 - Invest in quality work where you need it the most

DON'T PUT ALL YOUR EGGS IN ONE BASKET

- Save time for donor and sponsor stewardship
- Allocate time to your annual campaign
- When I served as E.D., grants were roughly half our budget
 - An annual campaign with recurring donors
 - Very little earned revenue (no classes or store)
 - No endowment, but small interest savings
 - Events with sponsorships



BONUS: THE ART OF WRITING

- Include the human element of your work when writing. Don't bury those human stories somewhere deep in the application.
- Some **FREE** resources on grant writing through:
 - Arts Midwest webinars
 - Candid Learning webinars
 - Nonprofit Learning Lab
 - Local & State-wide nonprofits



THANK YOU !



Q&A

