



Henry's Grant Writing Process

Phase 1: Pre-Application Phase (Strategic Foundation Building)

1. Prospect Research & Funder Mapping

- Use advanced tools like Foundation Directory Online, Instrumental, GrantStation, and Candid to identify potential funders.
- Leverage LinkedIn, Google Alerts, and funder newsletters to track updates, leadership changes, and new funding initiatives.
- Create a Funder Matrix that includes:
 - Alignment score (1-5) with organizational mission and programs.
 - Giving history (average grant size, focus areas, geographic preferences).
 - Key contacts (program officers, board members, decision-makers).
 - Deadlines and application cycles.
- Analyze past grantees and funder trends using tools like Candid's Foundation Maps or Glasspockets.

2. Relationship Cultivation

- Schedule introductory calls with program officers to build rapport and gain insights into funding priorities.
- Engage funders through site visits, newsletter updates, and impact reports to keep them informed about your organization's work.
- Use CRM tools (e.g., Salesforce, Bloomerang) to track interactions and nurture long-term relationships.
- Attend funder webinars and networking events to stay visible and build connections.

3. Opportunity Qualification (Week 2)

- Use a scoring rubric to evaluate opportunities based on:
 - Alignment with organizational goals.
 - Likelihood of success.
 - Resource requirements (time, staff, budget).
- Prioritize high-impact, high-alignment opportunities.

Phase 2: Proposal Development System (Structured & Collaborative)

1. Initial Planning

- Conduct a Kickoff Meeting with key stakeholders to:
 - Review the RFP or funding guidelines in detail.
 - Assign roles and responsibilities (e.g., writer, data collector, reviewer).
 - Develop a Proposal Timeline with clear milestones and deadlines.
- Create a **Proposal Outline** that includes:
 - Key sections (narrative, budget, attachments).
 - Required data points and metrics.
 - Funder-specific language and priorities.
- Draft a Logic Model to clearly articulate inputs, activities, outputs, and outcomes.

2. Data Collection & Story Gathering

- Conduct interviews with program staff, beneficiaries, and partners to gather qualitative data and success stories.
- Compile quantitative data (e.g., impact metrics, demographic information, financials).
- Use visual tools (e.g., infographics, charts, maps) to present data compellingly.
- Gather testimonials and letters of support from partners and beneficiaries.

3. Writing Phase

- Focused writing of key sections (problem statement, objectives, methodology).
- Research and incorporate funder-specific language, statistics, and case studies.
- Review daily progress and adjust the outline as needed.
- Incorporate storytelling techniques to humanize the narrative and make it relatable.

4. Review & Refinement

- Conduct a Technical Compliance Check to ensure all requirements are met.
- Organize a Collaborative Review Session with program staff, finance team, and leadership.
- Engage an External Peer Reviewer for an unbiased assessment.
- Finalize the proposal with polished language, consistent formatting, and error-free content.
- Ensure the proposal reflects your organization's branding (e.g., logo, colors, fonts) for a professional look.

Phase 3: Tools & Systems (Optimized for Efficiency)

- 1. Grant Management Database**
 - Use tools like Submittable, Fluxx, or Google Workspace to track submissions, deadlines, and outcomes.
- 2. Template Library**
 - Maintain a living library of templates for common sections (e.g., executive summaries, budgets, bios).
 - Include examples of successful proposals for reference.
- 3. Style Guide**
 - Develop a brand-aligned style guide for consistent tone, voice, and formatting.
- 4. Outcome Tracking Spreadsheet**
 - Track metrics such as submission dates, award amounts, and feedback from funders.

Phase 4: Quality Control Checklist (Comprehensive & Detail-Oriented)

- 1. Alignment with Funder Priorities**
 - Ensure the proposal reflects the funder's mission, values, and goals.
- 2. Clear Problem Statement**
 - Articulate the issue your organization addresses with data-driven evidence.
- 3. Compelling Needs Data**
 - Use statistics, stories, and visuals to demonstrate the urgency of the need.
- 4. Specific Objectives**
 - Include SMART (Specific, Measurable, Achievable, Relevant, Time-bound) goals.
- 5. Detailed Methodology**
 - Outline a clear, step-by-step plan for achieving the objectives.
- 6. Realistic Budget**
 - Provide a detailed, justified budget that aligns with the project scope.
- 7. Required Attachments**
 - Include all necessary documents (e.g., IRS determination letter, board list, financial statements).
- 8. Formatting Compliance**
 - Adhere to font, spacing, and page limit requirements.

Phase 5: Post-Submission (Strategic Follow-Up)

- 1. Document Lessons Learned**
 - Conduct a **post-submission debrief** to identify strengths and areas for improvement.
- 2. Update Template Library**
 - Incorporate new language, sections, or strategies from the proposal.
- 3. Schedule Follow-Up**
 - Send a thank-you note to the program officer and confirm receipt of the proposal.
 - Plan a follow-up call to address any questions or provide additional information.
- 4. Plan Report Requirements**
 - Prepare for reporting by setting up systems to track outcomes and deliverables.

Phase 6: Success Metrics (Data-Driven Evaluation)

- 1. New Grant Success Rate**
 - Target: 50%+
- 2. Renewal Rate**
 - Target: 90%+
- 3. Average Grant Size**
 - Track and aim to increase by 10-20% annually.
- 4. Growth in Grant Revenue**
 - Set a goal of an average of 15-25% year-over-year growth.

Phase 7: Key Performance Habits (Continuous Improvement)

- 1. Weekly Priority Review**
 - Assess progress on active proposals and adjust priorities as needed.
- 2. Monthly Pipeline Update**
 - Review the grant pipeline to ensure a steady flow of opportunities.
- 3. Quarterly Strategy Assessment**
 - Evaluate alignment between grant strategy and organizational goals.
- 4. Annual Process Evaluation**
 - Conduct a comprehensive review of the grant writing process and update tools, templates, and systems.