LAN DEVELOPMENT

The Latino Arts Network of California (LAN) was born out of a chain of cultural centers that linked the state. LAN is dedicated to strengthening and deepening the cooperative relationship among California's Latino artists, arts organizations and the communities we serve.

Latino Arts Network
A Brief Primer to Writing Proposals

By Tomas J. Benitez & Associates

Most non-profit organizations require support from grants. Writing a proposal to get a grant is not as difficult as it first seems but requires understanding the basic relationship between the arts organization and the funding source. Is it a good match for both parties? The more aligned your mission is to the goals of source, the more likely you are to get funded. The more clear, concise and compelling you can make a case, the more likely you are to get funded.

The more well prepared the proposal is presented, the more likely it is to be funded.

California
Arts Council

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▶ PREPLANNING

Your organization or group should have a clear idea of what you want to do, and how much you need to do it. Your annual budget is a projection, but also a planning guide.

Be realistic. Can you do what you say you want to do if you get the funding? Is what you are asking for in alignment with your mission, capacity and operations? Do you have clear Goals, (WHAT you want to achieve), and Objectives (HOW you will achieve your goals) that support your proposal request? Strategies are the priorities of your group to meet your mission and what are the programs and activities, in the order of importance, to achieving your goals and objectives. It should all reconcile back to your overall vision.

Once you have had time to determine your project that is in tandem with your vision, give yourself time to seek the funds. Most of the time you cannot expect to get funding for a project without at least seeking funds a minimum of six months in advance. Most funding is annual, that is, a year away, so plan accordingly, including using a budget projection for the next year.

▶ RESEARCH: Do your homework!

The sources of most proposals are foundations, corporations or private entities, and public resources. Some other sources include competitions, awards, or challenge type endeavors, but they are all still addressed as if you are writing a basic grant proposal.

Grant research is laborious and yet necessary to get to the point where you find yourself ready to submit a proposal. The Internet is the major tool, and allows you to search subject areas, specific sources or to view guidelines. Key search words to remember include; (name of the source), "community giving", "grants", "application", "charitable program", "community giving", etc. Not all potential supporters use the same process to get into their instructions and applications so be patient! Even funding sources that will require a hard copy application will have their guidelines on-line. Read everything very carefully!

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▶ The following websites are good places to start:

Foundation Center http://www.foundationcenter.org/
NEA ~ National Endowment for the Arts http://www.nea.gov/
NYFA Source http://www.nyfa.org/nyfa_source.asp?id=47&fid=1
CAC ~ California Arts Council http://www.cac.ca.gov/grants/
CCI ~ Center for Creative Innovation http://www.cciarts.org/funding.html
The James Irvine Foundation http://www.irvine.org/
WESTAF ~Western States Arts Federation http://www.westaf.org/
Alliance for CA Traditional Arts http://actaonline.org/

Rarely will you find any site that is translated into Spanish, this is the reality of this world. You may want to get someone to help you at this point because having a clear understanding of the guidelines and application is as important as any other stage.

Once you have identified the grant source, make sure you are eligible to seek funds. Do they fund what you are asking for? What don't they fund? Are there any deadlines or cycles of funding? Is there any size of organization restrictions, or do they limit funds to an organization based on size of budget, the area served, the age of people served? etc.

Do you qualify as a proposing organization or individual? In many cases, in an online process you will be vetted by a brief eligibility process, and asked a series of questions to make sure you can even begin an application. The questions reflect the scope of what a source will fund or not fund, and if you are successful, you will be invited to set up a user name, password and begin an application process. NOTE: Remember to keep track of your user name and password, write it down! And use bookmarks for the site application.

NOTE: Make a hard copy of the application and guidelines to use as a review (if possible). You can make notes, use the paper version as a check-off list for completion, and document the work you are doing to prepare for the proposal. Often the hard copy record will help you keep a record of thinking and planning which will help you other proposals.

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▶ QUESTIONS TO ANSWER

Overall, your core narrative and proposal should answer the old school review: Who, What, When, Where, How, (and How Much) and Why. A more detailed basic checklist for your proposal is to answer the following:

Who are you?

What do you want?

What is your project?

Who is to be served, and describe them (i.e. at risk youth, poverty level families of your city or community)?

Who is involved and what are their qualifications?

Where will the project take place?

When will the project take place and for how long?

What will be the results?

How will you evaluate the impact or success of the project?

How much will the project cost and for what items (all funding sources and budget)?

What will you do to sustain the project beyond the funding if it is to be kept going?

The sum total of these answers gives us the "WHY." Why are you doing the project? Why are you the right one to do the project? Why is it needed? Why should they fund you? **NOTE:** If your request is not project oriented, then the same questions and your answers need to be addressed to justify operational or general support.

▶ ELEMENTS OF A PROPOSAL: Hard Copy and Online grant application require most of the same information

▶ THE NARRATIVE

This section usually includes the basic project description, a brief history and mission of your organization, outline of programming, the goals and objectives of the project, some more detail of the project including a work plan and a time line, the personnel and qualifications of the people involved in the project, the target population, the area the project will take place, and your evaluation process to measure the impact and success of the project.

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Sometimes they will ask you the two basic "NOW" and "WHAT" question, what do you plan to do if you do not get all the funding you asked for, and how will you sustain the project once the year or stage of the project request is finished. Long range planning should be reflected in your budget and budget projections for the coming years.

▶ **FOUR KEY THINGS** to remember when are writing out your narrative and descriptions:

1) Tell your story. You are writing a proposal, not a grant. Write it as a statement of what you are going to do and justify why they want to be a partner. Be positive and confident about your project.

2) Make it clear, compelling, and again, justify your request. Prove you can do it!

3) Do not beg. Make your mission vital, make your request urgent if need be, and make your project seem like a solution to a need, but do not be strident, desperate or whiny. No one wants to be partners with a group that uses brinksmanship to ask for funding.

4) Be positive. You want to make your proposal exciting so be enthusiastic, but if you write you are the only group in your area doing what you do, you had better be right. Do not exaggerate, do not write like you are writing a press release, do not use words like the "greatest," the "only," the "first", unless they are absolutely true. Do not write with drama, comedy or anger. Tell your story using facts, the more you quantify your case the better off you are, including giving details, numbers, your experience and a history of success.

▶ **THE BUDGET**

The project budget should reflect the overall goals of the organization, and the overall operation of the organization. If it appears to be unrealistic, it will be regarded as such. If your organization is $100,000 annually, a project request that is larger than your annual operation makes no sense. Most of the time, you do not want to ask the source for 100% of the funding of a project. Make sure your budget and request is what the source will fund by category. Don't ask for staff support if they do not offer to support your staff. In many cases you are allowed to write a budget summary, so use this space to tell the narrative version of how much you want, how will it be used, how it will be matched.

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A matching source is what resources you have from other funders you are seeking or have secured to fund your project. The match is usually 50% of any requested item. Except from public funders, the match does not need to be absolutely a match, dollar per dollar. If you show that 100% of your staff need is coming from other sources, so you are asking for a larger percent for another category from your targeted funder, that is okay but be sure it all ends up totally 100% of the project.

In-kind is the estimated dollar amount of unpaid, free or donated services or goods that will be part of the project and can sometimes be used as a source of matching funds. Make sure this is allowable in each different request, the policy for in-kind varies. Do always show in-kind on your budget even if it's not counted in the total budget, it is good to show how you are using all your resources and getting other support besides actual dollars. Take the time to calculate the in-kind estimate; they are part of telling your story using the numbers of the budget.

▶ BY THE NUMBERS

Another key number to have on hand is your DUNS number, a number that you get from Dunn and Bradstreet for free. It is often required particularly for public sources.
You can call them and get the number in a short time over the phone, do this if you have not done so already, and do not do it on the day of the proposal deadline! It is easy, just call.

Have your postal four-digit number ready in case, the four numbers beyond your usual zip code. Go to www.usps.gov and ask for the four digit numbers; put in your regular zip code and they will give you the last four numbers. Write them down, keep them handy and near!

You must know the names and number of the district of your local city, county, statewide and congressional representatives, and keep them up to date. Write them all down and keep them near!

CA Legislative District Search
http://www.legislature.ca.gov/legislators_and_districts/districts/districts.html
US House of Representatives http://www.house.gov/representatives/find/
US Congress http://congress.org/congressorg/directory/congdir.tt
CA Legislature http://www.leginfo.ca.gov/yourleg.html
CA Latino Legislative Caucus http://www2.legislature.ca.gov/latinocaucus/

▶ ATTACHMENTS

Do you have all of the required information ready, including all the various attachments? Most applications will ask for core documents to the request, including financial records such as tax returns, budgets, audits and a budget for the project request. Some on-line applications will have a budget page you have to download, fill-in, and then upload again, but you should still have your budget in a separate, clearly labeled file to use and cut and paste. This should be true for all your narrative answers as well.

NOTE: Make a word document and a .PDF document, so you can manipulate the information as needed and then send as a final version as a .PDF or to use to cut and paste into the online format. For hard copies, you need to have these documents as separate files and attachments in any format as they ask.

If you do not have up to date financials then submit the most recently completed year. If you are a small group you may not have an audit, tell them that and give them a copy of your summary of Income and Expenses. If you are a large group and are years behind in audits and or tax returns, understand that this is paramount to being disqualified at the basic review stage. It is essential to have this information up to date and to be accurate!

All your financial records should be in a folder on your computer, each year per file per item, 990's, AFS, etc. Scan them in if needed, have them ready. This is what is a basic ready status requires. Same with an IRS letter and all of your core documents; Keep them all near each other so you can pull up the folder and have it as a reference as you are completing the proposal.

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Core items, such as articles of incorporation, by-laws, the most recent Strategic Plan from your Board and a copy of your 501c3 non-profit tax status, or your IRS letter. NOTE: You should have it written down AND memorized! Remember it's often called your "taxpayer or FEIN employer identification number." It is the same number, XX-XXXXXXX, learn it!

A Board of Directors list with years of service on the board, officer titles, contact in formation such as work title, place of work, address and phone number, not necessarily personal or home information. They want to know who is on your board and for how long. For the Board Officers only, cell phones and fax numbers reflect an openness to contact. **A staff lis**t with qualifications or short biographies. If they ask for biographies, send them biographies, not resumes. Take the time to rewrite the resume into a brief biography. Keep them up to date, no need to rewrite them when you are doing the proposal. **Biographies and work samples of artists** or teaching artists that may be part of your project, and remember to include links to the artist if they have them, a good resource. **A record of the largest five or ten funders over the past year, or a funding history.** They want to know who else is supporting you, include everything and every one you can think of, including in-kind sources (goods and services). Samples of lesson plans or work plans. Samples of writing, music or images from the artists or artist/instructors who will be a part of your project. **Timelines and calendar**, what does your project look like in stages over a calendar year? **Documentation of artistic activity**, programming history, samples of your services, including photos, slides, CD's, DVD's, catalogs, work samples, promotional materials and links. **Letters of support,** and if you are doing a collaboration with other groups or artists, always include letters that confirm the participation of the others, even if their participation is contingent on funding.

NOTE: With most of the on-line applications, you will be asked to upload these documents. The upload process varies, but the operation is essentially the same. Have these documents ready to go on your computer desktop, along with your narrative (s), usually as a PDF.

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▶ **UPLOADING**

Also a big warning, do not wait to the last minute to upload even though it is the last step in the process of most on-line applications. Do this first, it usually takes longer than you thought even just to upload successfully, and if you have a glitch you have time to fix it, call the tech source and problem solve. In particular with www.grants.gov the federal site, when they tell you to get your work in two weeks in advance, they know what they are talking about, it's a complex process that requires time and patience, and time, and patience.

▶ **CDP: California Data Project** http://www.caculturaldata.org

The California Data Project is an online service of a consortium of major funders and in particular arts funders who have developed a process to monitor your financial history. To get started requires some orientation and there is a tutorial on the site. You also have to input data from your audited statements or 990's, your tax forms. It is laborious, don't kid yourself, it takes time and you have to have a lot of information ready or get it ready by going through all of your records. You have to input at least two years to make it work. Once you do this you will be able to generate reports for most of the major funders who are using this service and who are requiring you to submit a report. It can become a tool for the organization to help keep financial records, but it is like any other financial report process, garbage in, garbage out. You must be consistent and true, or it will do no good. So the information has to be accurate and consistent with your budget, taxes, etc. The site is very good at helping you get this into place, and they have a helpline that is also very good and quick to help you when you get stumped. Most of us get stumped along the way. Again, this is becoming part of the basic tool kit for seeking funding sources, and it is a vital aspect of your preparation in California.

▶ **GUIDESTAR** http://www.guidestar.org/

Guidestar is an online service that posts your IRS 990's, and many funders are using it more and more to look over your financial health. You must be sure your information is correct and easy to access on Guidestar, and you must be sure that your information is consistent with your annual budget from previous years, as well as projections for the current and coming years. The information is all from the same source, but should also be aligned with your audits and the CDP.

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▶ GRANTS.GOV

This is the site for submitting all federal requests, including the NEA National Endowment for the Arts and the NEH the National Endowment for the Humanities. You have to register with them first and weeks in advance of a proposal deadline. Start with the CCR number. Go to www.grants.gov and get this process started. You will need your bank number and a routing number, on the bottom of your check, in hand when you begin, plus a DUNS number and of course your Federal Tax ID.

Other departments of the federal government that offer grants for arts or programs that will use arts to serve include the Department of Education, Department of Labor and the Department of Justice, plus many, many more. Sign up with Notifier07@grants.gov to receive regular listings of all the federal call for proposals at every level.

▶ OTHER GOVERNMENT SOURCES

The California Arts Council http://www.cac.ca.gov/grants/ is the state arts department, and they have a lot of information, a few programs and even less resources for grants, but they are very important as the state wide representative and should be on your radar at all times.   Local governments vary, some do not have city arts departments, and some are part of a consortium. Most have a department and most counties have an arts council as well. You need to seek out in your area who has what and be aware of their activities as part of your advocacy activities just to support yourself and keep your interests in the forefront.

▶ READINESS OF THE PROPOSAL

Once you have done your pre-planning, research and proposal planning, you are now at a state of "Readiness." You have organized all your documents and attachments are in place, probably littered all over your desktop for the moment, but you will create a folder and throw it all in there when you are done. You have a narrative and description of the project, the budget is worked out, and you have everything and all requested materials ready to upload as needed. **NOTE:** Start slow, do all the basic fill ins, if you are doing an online application it will fill in for you from previous requests, double check it anyway. Has your address or have the contact names changed? Are the contact phone numbers and links correct and up to date? Read every word twice!

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▶ PRACTICAL ADVICE

Make sure the loading documents are labeled exactly the way they want. Make sure you cut and paste correctly, not leaving off lines or words. Does the cut and paste fit? Do you have to cut or trim the narrative to fit into the word count? Do it with the working copy, not in the application, and then follow your own edits. If you are submitting a hard copy, does it look good? Can you read it? Did you use the right font? Have you done a proper spell check? Do a spell check on the working copy, then cut and paste that, don't do it on the application. When you are ready to send, read it all over, make sure you pasted and copied into the right place, the uploads are in the right order, in the right place. Have others read everything over, not just the documents by themselves, but read the entire application online or in print. All this requires time to execute properly, and calmly.

If sending a hard copy by mail, have you made copies of everything? Multiple copies if they asked for them. Bound or unbound as they requested, clips or no clips, usually no rubber bands, and each copy is numbered as they like; the original signatures are usually the top or first copy. Take your time collating copies; make sure you don't skip one single page. **NOTE:** Make sure the printer is loaded with enough paper, it is working properly and on-line and has all the ink it needs well before you start to use it to make all of your copies.

Do you have the right envelope or package? Is everything labeled and do you have the right address to be mailed or dropped off written on the package? You have postage and a kind of mailing certificate filled out? Have a pen in your pocket. Have gas in your car? A box to carry everything. Did you enclose a self addressed stamped envelope so they can return your work samples if you want them back?

Write down the password and user name on a paper folder AND save it on our computer. You can save and go back to the application, bookmark the site. Make a paper copy of the working documents and the draft proposal and save the copy, as well as all your notes, copies of what you uploaded (or at least a list of what you sent them), and of course a copy of the completed proposal once you either send or mail it off. Make a list of work samples is also very important to remember.

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Once you press the send button, drop it off or get it in the mail, on time, the proposal is done. But you want to make sure you have a complete folder on record, you can access the application site, and you have a hard copy to document the proposal submission.

▶ KEEPING TRACK

Make a chart; create a system, however you do it and how it works best for you. But track the name of the source, what you asked for and how much, when you submitted it, and what are the password and user names. When you get calls or letters, document that too.

Once your funding has been granted, put a grants management system in place. A simple worksheet that can be added to each grant file is attached.

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Grant Worksheet

Grantor:		Award Amount:
		$
Contract #:	**Contact Info:**	
Project Title/Description:		
Date Awarded:	**Grant Period:**	
Match Requirement:	**Matching Grants/ Income:**	**Amount Matched:**
1:1		$
Invoice Date/Amount:	**Date Received:**	**Bank Account:**
Interim Report(s) Due Date:	**Date Report(s) Sent:**	
Date Final Report Due/ Sent:	**Final Report Sent:**	
Date Grant Closed:		