

# 10 BEST LESSONS FROM 10 GRANT WRITING EXPERTS

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# Introduction

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Let's face it. Grant writing is hard and not a skill easily mastered. That's why every few weeks, we provide free educational grant workshops for you and your development team to hone your grant writing skills.

In these workshops, Instrumentl collaborates with some of the industry's leading experts to teach a topic that is directly relevant to your work as a grantseeker.

To date, we've published more than ten hours of educational content, and this downloadable will share with you ten of the best lessons from ten grant writing experts.

If you find this resource helpful, please feel free to share this with anyone else you think may benefit from it.

Enjoy, and let's jump right into lesson #1.

# Lesson #1: Use this formula to always write SMART objective statements.

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In her session on *Connecting Smart Project Goals, SMART Objectives, and Grant Research Keywords*, Dr. Bev Browning shared this formula:

*By the end of \_\_\_\_\_, increase \_\_\_\_\_% or more as demonstrated by \_\_\_\_\_.*

Bad example:

- Increase hot meal deliveries by 100%.

Good example:

- By the end of year 1, increase the percent of the City of Merced's low-income senior citizens receiving hot meal deliveries by 25% or more as demonstrated by the number of eligible individuals completing applications, number of new hot meal deliveries, number of new zip codes served, and number of senior citizens affordable housing complexes signing up for residents to receive the funded delivery services.

Keep in mind:

- You should not put a specific timeline in the first blank as you may not know when a particular funding opportunity will be awarded. Try to stay away from months and go with quarters or years since funders typically fund in cycles of twelve months.

# Lesson #1: Use this formula to always write SMART objective statements cont.

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- “% or more” gives you the optionality to outperform what your estimate is for your impact.
- Clearly answering the question on “as demonstrated by” makes it crystal clear what the desired measured output is.
  - This sets up your evaluation plan for success.
  - Your outputs should always be numbers. Anything you cannot count is an outcome and outcomes are always written in past-tense.

**What to do with this:** Pull up your last three objective statement drafts and align them to Dr. Bev.’s formula. You should find they become significantly stronger when following this model.

To learn more from this session, be sure to watch the entire workshop [covering SMART Objectives and project goals on-demand here](#).

## Lesson #2: Use the Minimum Distribution Rule to gage new potential funders.

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In her session, *How to Thrive in a Post-Pandemic Economy*, Margit Brazda-Poirier shared why grants remain one of the most sustainable ways to diversify your nonprofit's fundraising efforts.

It all comes down to the sheer number of grantmaking foundations (87,000+) and the Minimum Distribution Rule.

The Minimum Distribution Rule states that charitable foundations must give 5% of the average market value of its net investment assets in the form of qualifying distributions.

This means for grantseekers like yourself, you can find any foundation's 990 report and take their total assets and multiply it by 5%.



## Lesson #2: Use the Minimum Distribution Rule to gage new potential funders cont.

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This tactic gives you a quick back of the envelope estimate as to how much the foundation will be giving in their funding year.

Oftentimes, you may end up finding that organizations give more than the 5%, but remembering this rule can be a great way to identify high-value new funders for your organization.

**What to do with this:** Go into Instrumentl or whatever tool you use for conducting 990 research, and find the total assets line for the last five opportunities you've been researching. Jot down the 5% number into your decision matrix in evaluating which of these opportunities may have the most funding available for applicants.

Watch Margit's full workshop sharing more on the three C's to thriving in a pandemic economy [here](#).

## Lesson #3: Leverage the SOAR Model to better plan your organization's priorities.

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In her workshop, *How to SOAR to Effective Grant Planning and Prospect Research*, Rachel Werner introduced the SOAR Model as a preferred model over the more popular SWOT analysis, as a great way to flip the script of organizational discussions to be rooted from a positive growth mindset lens.

Taking time with your organization to answer these questions can help create actionable plans in your nonprofit's grant strategy.

<b>Strengths:</b> What can we build on? <ul style="list-style-type: none"><li>• What are we most proud of as an organization?</li><li>• What makes us uniquely us?</li><li>• What is our proudest accomplishment in the last few years?</li><li>• How do we use our strengths to get results?</li><li>• How do our strengths fit our realities?</li><li>• What do we do or provide that is world class for our community and other potential stakeholders?</li></ul>	<b>Aspirations:</b> What do we care deeply about? <ul style="list-style-type: none"><li>• What are we deeply passionate about?</li><li>• Reflecting on our <i>Strengths</i> and <i>Opportunities</i> conversations, who are we, who should we become and where should we go in the future?</li><li>• What is our most compelling aspiration?</li><li>• What strategic initiatives (projects, programs, and processes) would support our aspirations?</li></ul>
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## Lesson #3: Leverage the SOAR Model to better plan your organization's priorities cont.

<p><b>Opportunities:</b> What are our stakeholders asking for?</p> <ul style="list-style-type: none"><li>• How do we make sense of opportunities provided by the external forces and trends?</li><li>• What are the top three opportunities we should focus our efforts on?</li><li>• How can we best meet the needs of our stakeholders?</li><li>• Who are possible new people we can impact?</li><li>• How can we differentiate ourselves from existing or potential other peer organizations?</li><li>• What are possible new products, services or communities we can serve?</li><li>• How can we reframe challenges to be seen as opportunities?</li><li>• What new skills do we need to move forward?</li></ul>	<p><b>Results:</b> How do we know we are succeeding?</p> <ul style="list-style-type: none"><li>• Considering our <i>Strengths, Opportunities, and Aspirations</i>, what meaningful measures would indicate we are on track to achieving our goals?</li><li>• What are 3-5 indicators to create a scorecard that addresses our impact?</li><li>• What resources are needed to implement vital projects?</li><li>• What are the best rewards to support those who achieve our goals?</li></ul>
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[See original model at the Libraries of the University of Missouri](#)

**What to do with this:** Schedule a team meeting with your organization to run through the SOAR model in-depth. This reflection should help ground you. Then, update your fundraising goals and start implementing and tracking your outcomes.

To learn more about Grant Strategy Planning 101, [review Rachel's full workshop here.](#)

## Lesson #4: Asking for feedback this way to get actual responses.

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In her workshop, *Funder Feedback: Ask the Right Way – to Get the Right Results*, Maryn Boess shared the exact method she has used to get meaningful feedback from grantmakers.

First, it's important to note, not all grantors can or will share feedback or reviewers' comments. Aside from this, most people also never ask. And most people who do ask, ask the wrong question.

Here's the way you've probably asked for feedback:

*"Why wasn't our proposal selected?"*

And here's the response you've probably gotten:

*"Given the mix of proposals we were considering, and the amount of funding available, there were other proposals the review committee saw as a better fit for what we want to accomplish with our funding this time around."*

This is the most common and honest response to the **wrong question to ask when requesting feedback**.

## Lesson #4: Asking for feedback this way to get actual responses cont.

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The right way to ask for feedback is as follows:

*“I know a lot of different factors come into play in your team’s review and decision-making process.”*

*“We’re committed to the project and want to continue seeking financial support for it.”*

*“Is there anything you can share from the review process that might help us strengthen this proposal and do a better job with our proposals in the future?”*

The reason this is much more effective is it comes from an open mindset that is focused on improving your applications in the future, and not on the particularities of why that specific proposal was not accepted. It gives you a basis to actually improve your proposals in the future.

Maryn shared a few more helpful tips around requesting grant funder feedback:

- Don’t take feedback personally.
- Don’t go chasing the “universal perfect proposal”. Most feedback is very specific to a given review process.
- Different reviewers will see the exact same thing very differently.
- Take what makes sense and hold the rest very lightly.
- Ask for feedback when you don’t get the grant, **and ask for feedback when you do**. This’ll help you truly stand out from the pack.

## Lesson #4: Asking for feedback this way to get actual responses cont.

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**What to do with this:** Apply Maryn's approach the next time you request for funder feedback. Then, take note of what feedback is relevant for your nonprofit moving forward with its next grant proposals.

To learn more about how to ask for funder feedback the write way, [watch Maryn's workshop on-demand here.](#)

## Lesson #5: Ask these exact 7 questions when connecting with funders.

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In her workshop, *How to Go From 100+ Grants to The Best Fits for You: The Grant Writing Unicorn Method*, Meredith Noble shared seven questions she often uses when connecting with funders.

### *1. Did you have a chance to review the funding overview we sent?*

Sometimes things come up and this can serve as a helpful bump for the funder to take a closer look at something you previously sent.

### *2. Based on that information, do you think we are a good fit for your program?*

Meredith recommends you ask the funder to be as transparent as they can be with you up front; this way, you'll save time in evaluating whether this opportunity is worth it.

### *3. What should we be doing to better position ourselves for success with your program?*

Here, you'll learn the specific things the funder would love to see from your group that can better position both of you for success.

### *4. We are a [your organization type] and believe we are eligible for your program. Do you agree?*

This question is intended to affirm the fit with the funder. It's a direct yes or no answer.

## Lesson #5: Ask these exact 7 questions when connecting with funders cont.

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### *5. We think the best time to apply would be [time]. Do you agree?*

Having your funding strategy here is very helpful here since you can share it with the funder to show you're prepared and that you're thinking about the strategic best time to apply.

The reason this is important is to align yourself to the funder's timeline of selecting grantees.

### *6. What makes successful applicants stand apart from the rest?*

This delineates you as a serious applicant that wants to ensure you align well with what the funder has historically liked funding.

### *7. Is there anything else you want us to know or think about?*

This ensures any loose end is addressed. By connecting with funders in this sort of strategic way, you anticipate the things your nonprofit will need to make sure to include in its application to give it the best shot at being selected.

**What to do with this:** Next time you connect with a funder, go through these exact seven questions and jot down the responses to each of these questions. Regroup with your team and ensure your grant proposal is able to address every response comprehensively before submitting.

To learn more tactics like how to determine competitiveness of a grant opportunity via email, [watch the rest of Meredith's workshop on-demand here.](#)

## Lesson #6: Write to the scoring criteria to avoid grant writer's block.

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In her workshop, *7 Tips to Write Grants Like a Pro*, Holly Rustick shared how to go from a blank page to grant template.

Her primary tip here is to look at the scoring criteria from the foundation and then make those your primary headers in your proposals. Adapt accordingly, but make it crystal clear to the grant reviewer what part of the criteria you are writing for.



## Lesson #6: Write to the scoring criteria to avoid grant writer's block cont.

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For example, if the opportunity asks for a section discussing Community Eligibility and Assessment of Community Needs, you'll want to have a section in your proposal using a header along the lines of Community Eligibility and Assessment of Community Needs.

### *III. Project Description*

The narrative project description should be no longer than 25 pages in total and should be prepared using the formatting instructions above in Part D, Section 2(b) of this FOA.

#### *A. Community Eligibility and Assessment of Community Needs*

Identify the area to be served by the project and the community or communities within the identified area that will benefit from the project. Identify the local government division that administers each community and the community population. Identify the location of the proposed project. Show that the proposed project's beneficiaries are communities where the average annual residential energy costs exceed one or more of the benchmark criteria for extremely high energy costs listed in Table 1 of this notice and further described in Part C, Section 3(b) of this FOA. Local energy providers and



## Lesson #6: Write to the scoring criteria to avoid grant writer's block cont.

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If there are clear prompts within that section to identify areas served or particular interest groups, you'll want to address each point head on one by one.

Here's an example of how that might look:

### 1. Project Design

#### 1A. Community Eligibility and Assessment of Community Needs

The **area to be served** by the **Project Name** will be on the island of Guam. **The community to be served** in Guam that will benefit from the project are 100 indigenous makerspace entrepreneurs. **The local government division** that oversees this community is the University of Guam and the Guam Economic Development Authority. The **Project NAME** will be located in Chamorro village, which is in the heart of the island's capital with frontage building facing the main highway. The **average annual residential energy costs** that beneficiaries face, and all Guam residents, exceeds all benchmarks shown in Table 1 by **[Holly check on rates here and add source and percentage]** (Source here).

**What to do with this:** Use this approach to write to the scoring criteria and combat ever having to start with a blank screen again. The next time you review an opportunity, look for key phrases in the proposal or in the scoring guidelines to help you compose the framework for your grant proposal.

To learn more of Holly's best tips for writing grants like a pro, [watch her workshop on-demand here](#).

# Lesson #7: Create a weighted rubric using these six steps to decide go and no-go situations.

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In her workshop, *How to Use a Decision Matrix in Your Grant Strategy*, Stacy Fitzsimmons outlined six clear steps you can take to create a weighted rubric. Weighted rubrics are great ways to bring clarity to your nonprofit organization in assessing which grant opportunities to work on and which ones to pass on.

## Step 1: Document the background

Be sure you can answer these questions:

- Why is the decision tool needed?
- How will you use it?
- Who will use it?
- What decisions do you envision using it for?

## Step 2: Review data and previous examples

Here, you'll collect sample data or examples you can use to craft criteria and use it as a test case.

Make sure to use a variety of examples including opportunities you've previously pursued and won, pursued and didn't win, as well as those you didn't pursue.

## Step 3: Compile information for your weighted rubric

Create a list of criteria that you might include into your rubric. A few to consider include:

- Organizational priorities

## Lesson #7: Create a weighted rubric using these six steps to decide go and no-go situations cont.

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- Best practices
- Pet peeves
- Success benchmarks
- Performance measures
- Data or sample items that have been parts of success
- Data or sample items that have been barriers

From here, phrase each of these as an evaluation criteria category.

You may consider criteria such as the number of awards available, eligibility requirements, likelihood your team can meet the deadline, key personnel availability or mission alignment.

Once you have these criteria outlined, assign a weight to each criteria. Base this off of the importance to your organization and risk acceptance or avoidance for the criteria.

The more important something is to the organization or the greater the risk avoidance, the higher weight you'll want to give something (less risky opportunities being weighted heavier in your rubric).

In general, you'll use a range that is half of the scoring range. So if for example your scoring range is 20 points, the weight would be 1-10 with 10 being the highest weight.

## Lesson #7: Create a weighted rubric using these six steps to decide go and no-go situations cont.

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Try not to have more than 10% of the criteria have the highest weight.

For example:

- Number of awards (5)
- Eligibility (5)
- Likelihood to Meet Deadlines (4)
- Key Personnel Availability (3)
- Mission Alignment (3)

From here, you'll create a list of information needed to make the decision including items that might be related to the criteria.

For example, due dates, value of the award, proposed project manager, award type, or estimated start date.

### Step 4: Determine the validity of your weighted rubric

Take the examples from step 2 and run it through your criteria to see if the main criteria are covered, if all the components are valid and if you missed anything.

The goal here is to capture feedback and identify common themes before launching it with the rest of your team.

# Lesson #7: Create a weighted rubric using these six steps to decide go and no-go situations cont.

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## Step 5: Build the rubric

From here, enter criteria and descriptions for each scoring range and provide noticeable differences among the scoring levels.

Make things quantifiable or easily characterized (i.e. make it easy to categorize things by great fit, neutral, or bad fit).

## Step 6: Test and launch your weighted rubric

Continue testing your tool using previous decisions or existing data and then communicate with your key stakeholders as to how and when you'll use the rubric going forward.

Most often, organizations either start using weighted rubrics individually, in a group setting, or individually followed by a group discussion. Your usage may vary based on the culture of your nonprofit.

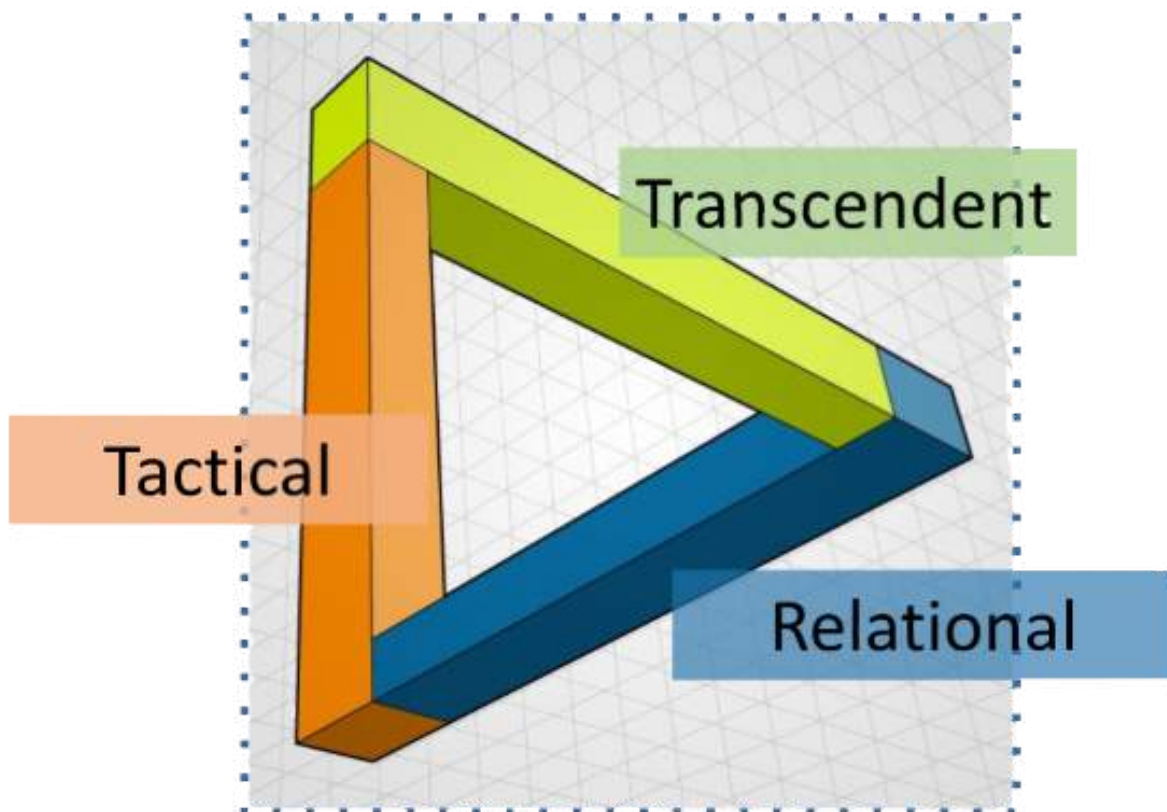
**What to do with this:** Start forming your own weighted rubric and stress testing it with the last few proposals you've worked on.

To learn more in-depth on the process of creating a weighted rubric, [watch Stacy's workshop here.](#)

## Lesson #8: Introduce tactical, relational and transcendent perspective to your grant strategy.

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In her workshop, *Partnership Pays! 5 Ways Partnering Builds More Grants Success, Faster*, Maryn Boess talked mindsets and emphasized the importance of changing the way we think about partnership to think about it from a tactical, relational and transcendent perspective.



She began by pointing out the flaws of the common belief when it comes to grants that it's a competitive process.

Thinking about this from the oldest-school perspective, organizations often view this as a zero-sum game where there's only so much to go around.

## Lesson #8: Introduce tactical, relational and transcendent perspective to your grant strategy cont.

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Either you win or lose. If someone else wins a grant, you lose and vice versa. You have to know to play the game when it comes to grants.

By reconsidering this mindset higher in our hierarchy of thinking and viewing this from a tactical lens, we might reframe this around the fact that partnership and collaboration is the single most powerful way to amplify and accelerate our grants success.

Considering this from a relational perspective, you'd realize that collaborating with others is good for our community as a whole; we can share resources and support each other's success and all get what we need.

Finally, looking at things from the transcendent perspective, we'd consider that there's already more than enough of everything we need to create the world we want to see.

By taking this approach one by one, we can more adequately tackle some of the common challenges nonprofits face when it comes to forming effective partnerships with one another.

**What to do with this:** Consider what zero-sum beliefs your nonprofit may have around its grant strategy today and how it can transcend that mindset to be more collaborative and open to partnership.

Then, [watch the rest of Maryn's workshop](#) to learn clear steps you can take in collaborating with other organizations.

## Lesson #9: Pre-write your support letters for those you're requesting support from.

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In her workshop, *Getting Stellar Support Letters for Your Grants*, Rachel Waterman emphasized how hoping to get more support letters is not a strategy and if you want to get more support letters, you need to build a system.

1. That system begins first by identifying potential supporters.
2. Reach out to prospective supporters and request support with your grant applications. If they agree to help, have someone on your grant team contact them.
3. When contacting these individuals, schedule a call to ask key questions about their experiences with your organization and offer to create a draft (they will almost always say yes) and then prepare questions for the follow up call.
4. Prior to your call, pre-write your letter. Write out the name, address and any relevant information around the opportunity you're applying for. Be sure to also make sure it's clear what the relationship and history of the prospective supporter is with the organization and what information you have and don't have. Wherever there are blanks, aim to fill in these blanks during your interview.
5. During your call, confirm the relationship as you understand it, ask questions that reveal the information you still need, and make sure to make the call conversational. Actively listen and communicate clearly all the things you're going to be including in the letter so they know what to expect when you send over the draft.



## Lesson #9: Pre-write your support letters for those you're requesting support from cont.

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6. After the interview, craft a rough draft using their words whenever possible. Ask them to review the content and make edits or suggestions; if appropriate, ask for a picture to include in the letter. Make your final edits and then print and get their signature to wrap things up!

Remember to **avoid making these “Don’ts”**:

- Use generic form letters
- Have unsigned letters
- Use templates or fill in the blanks
- Ask people to write their own letter
- Tell them the actual grant deadline. Instead, say something along the lines of, “I have to provide this support letter to my team by [Date]”

At the same time, **remember these “Dos”**:

- Find out something you didn't know before from your call
- Be careful with language used
- Offer to print & sign for them
- Ask to keep an undated copy
- Ask if you can request an updated letter if or when needed
- Offer a copy of the proposal (with clearance)
- Always say “thank you”
- Offer to provide a reciprocal support letter for their efforts
- Remember to notify if or when the grant is received
- Touch base at least once a year (continue nurturing your relationship)

What to do with this: [Check out the replay to this workshop](#) for real-world examples of excellent support letters Rachel's team has collected over the years.

## Lesson #10: Craft a sound budget to motivate funders to fund you.

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In his workshop, *Behind the Grantmaker's Curtain: What Funders Want*, Matt Hugg shared how a budget is more than just a list of expenses. It shows how well you understand your mission and those you serve, and your funders know it.

From a grantmaker's perspective, they're going to be asking questions such as:

- Is their budget detailed enough?
- Are the right elements in the budget for a successful program?
- Are they asking for too much or too little?
- Is there a contingency plan in place?
- Does the budget comply with our grant guidelines?

# Lesson #10: Craft a sound budget to motivate funders to fund you cont.

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Matt shared how a grantmaker may turn you down because:

- Your budget isn't clear, correct or even provided
- Your budget is not within the funder's funding range
- You only went for the big grant
- Your budget was unrealistic in its estimates for equipment, supplies and personnel
- Your total budget doesn't match the expected benefits (asking for too much or too little)
- Your budget made simple arithmetic errors

To ensure you build a strong budget, Matt recommends:

- Create a professional looking budget
- Write a thoughtful budget narrative
- Use realistic figures
- Show all expenses
- Don't low ball or pad numbers
- Follow the funder's rules
- Check your math twice
- Ask yourself: if this was my money, would I buy this?

**What to do with this:** Learn the other nine points Matt shared from his 30+ years of experience in having discussions and interviews with funders by [watching his workshop replay here.](#)

# Wrapping Things Up

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There you have it!

Ten of the best lessons from more than ten hours of grant writing classes.

If you enjoyed this breakdown, you may enjoy attending one of our grant writing workshops live. [You can RSVP for our next ones here.](#)

For more free grant writing content, [bookmark our blog](#). We release content weekly teaching you the ins and outs of grant writing.

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