



MONTEREY PENINSULA FOUNDATION
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HELPFUL HINTS

SHAPING A STRONG GRANT APPLICATION

1. Do your research. If the grantmaker has a website, review it and download the applicable materials. Review the grantmaking procedures and guidelines before contacting the grantmaker with questions.
2. Make sure you understand the expectations and procedures of the grantmaker. If in doubt, ask for clarification.
3. Follow the directions outlined in the application/guidelines. Use a grant application checklist if provided and include only the materials specified. Proofread carefully - make sure numbers add up and typos are removed.
4. Grantmakers frequently need to read many letters and applications in a short period of time; an application that is easy to read and with clear content is more likely to be given serious consideration.
5. Don't ask, "What would you fund?" or "What amount should I ask for?" Grantmakers can give guidance, but most do not want to give the impression that they can "guarantee" a grant for a certain project or for a certain amount. Ask yourself the question "What is our organization's greatest current need, and how does it fit into this grantmakers guidelines?"
6. Keep a copy of your grant application and all correspondence for your files.

EFFECTIVELY MANAGING A GRANT AWARD

After a grant is received, the grantee will carry out the activities it proposed in its grant application. The grantee will need to show the funder that it is meeting its stated objectives and following grant requirements. The following helpful hints may help in managing grant awards:

1. Read all the materials sent with the grant, including the grant award letter and other documents (i.e., a grant agreement).
2. Notify the appropriate staff/volunteers about the grant award.
3. Maintain a file for the grant award to include a copy of the grant application, the grant agreement, correspondence, and reporting forms.
4. Review the grant agreement with the person who will be responsible for managing the grant award. Make note of any special tasks and deadlines. The responsible individual will need to:
 - a) Create a grant award calendar and note all reporting dates.

- b) Review the final report requirements, make note of any information that should be collected, and develop a plan to collect this information.
- c) Maintain a record of income and expenses related to the project, using generally accepted accounting practices.
- d) Send the final grant outcome report on time. If a specific form or format is required, use it. If you are unable to send the grant outcome report on time, request an extension from the grantmaker, explaining why the report will be late.
- e) Contact the grantmaker if there are any questions about the grant award, a change in the purpose of the funded project, or a need for an extension of the grant.

DEVELOPING A BUDGET

The budget tips and sample provided below are meant to serve as a guide, not a mandatory budget format. Your budget does not have to duplicate this format exactly.

- Clearly depict how much money is needed and how it will be used.
- The budget should include sources (income) and uses (expenses) of funds.
- Sources of funds should include names of other funding organizations and amounts pledged or received as well as amounts still needed to be raised and possible sources for those funds.
- Indicate the time period covered by the budget.
- Finally, make sure all the numbers add up.

SAMPLE BUDGET CATEGORIES

Below is a list of suggested budget categories to use when developing your proposal budget. The clearer you are about where funds are coming from and how they will be used, the easier it will be for the reviewer to assess your financial need.

Sources of Funds

- ✓ Federal/state/local grants or contracts
- ✓ Bequests
- ✓ Corporate and foundation grants
- ✓ United Way and Federated Campaigns
- ✓ Other fundraising, such as individual gifts and special events
- ✓ Other types of income (fees, membership dues, sales of publications or merchandise, etc.)

Uses of Funds (Expenses)

- ✓ Salaries, benefits and payroll taxes
- ✓ Professional or consulting fees
- ✓ Insurance
- ✓ Travel and transportation
- ✓ Supplies, copying, postage
- ✓ Rent and utilities
- ✓ Staff training and development

SAMPLE PROGRAM BUDGET

Organization Name: ABC Nonprofit
Program Name: Literacy program
Program Date: 7/1/15 – 6/30/16
Request to: Monterey Peninsula Foundation

INCOME:	Monterey Peninsula Foundation	Other Proposals	Committed Funds	Program Revenue	TOTAL	Actuals <i>(Leave this column blank until grant report)</i>
Monterey Peninsula Foundation	\$25,000				\$25,000	
Foundation A		\$57,500	\$25,000		\$82,500	
Foundation B			\$2,500		\$2,500	
State Grant		\$2,500			\$2,500	
Annual Silent Auction				\$10,000	\$10,000	
Donations from individuals				\$5,000	\$5,000	
	\$25,000	\$60,000	\$27,500	\$15,000	\$127,500	

EXPENSES:	Monterey Peninsula Foundation	Other Proposals	Committed Funds	Program Revenue	TOTAL	Actuals <i>(Leave this column blank until grant report)</i>
Program Manager	\$25,000	\$14,000	\$25,000		\$64,000	
Part-Time Staff		\$10,000	\$2,500		\$12,500	
Taxes and Benefits		\$1,000			\$1,000	
Evaluation		\$5,000			\$5,000	
Supplies		\$5,000			\$5,000	
Travel				\$10,000	\$10,000	
Publications and Postage		\$5,000			\$5,000	
Rent and Utilities				\$5,000	\$5,000	
Staff Training		\$20,000			\$20,000	
	\$25,000	\$60,000	\$27,500	\$15,000	\$127,500	