



32° Masonic Learning Centers GrantAID User Guide 2008 Contents

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Introduction 2008

Seeking grants is an effective way to garner support for your Learning Center. Requesting funds from the foundations, trusts, corporate giving programs and other charitable organizations in your communities supports the overall goal of expanding local ownership of your Learning Center.

Grant-seeking may be different from the fundraising environment to which you are accustomed, but it is an efficient approach to fundraising. Applying for a grant often takes less time and effort than organizing and hosting a fundraising event. After a grant is awarded, you often have the opportunity to apply to the same grantmaker year after year, making only minor changes to your proposal because the initial process of identifying and researching has already been done.

The goal of this updated GrantAID Proposal Kit is to support all Learning Center Boards of Governors as they commit to seek public and private sector grant support. The Grants Office in Lexington is committed to your vision of helping children overcome dyslexia and will make every effort to assist you in researching, writing and submitting grants. Because our Learning Center program now encompasses 59 Centers, the office in Lexington cannot individually write each grant. What we have done is develop templates for your use and stand ready to support your efforts.

This guide is broken into ten steps. Each step is designed to assist you when you are applying for grants. We wish you every success in this essential effort.

If you have questions or need help at any time throughout the grant process, please contact these members of our Development Staff.

Catherine Cox, Grant AdministratorEmail: ccox@scottishritecharities.org

Phone: 781-465-3344

Group Fax: 781-674-2102

Mailing Address: Scottish Rite Charities
33 Marrett Rd.
Lexington, MA 02420**Bridget Steele, Charities Assistant**Email: bsteele@scottishritecharities.org

Phone: 781-465-3341

Step 1: Select a Grants Chair for your Learning Center.

One person must be the “point person” responsible for asking for grants at your Learning Center. Once chosen, the Grants Chair should contact our Grant Administrator.

The Grants Chair must:

- Have an online connection and email account
- Be willing to research grantmakers and complete proposals with the help of the Development Office
- Be prepared to personally interact with foundation staff and/or leadership
- Communicate regularly with the Learning Center to ensure that correspondence is received and sent in a timely manner

Step 2: Fill out the Learning Center information form.

To maximize efficiency, it is critical that you fill out the Learning Center information form at your next Board meeting. This electronic form contains the basic information you will need to prepare grants and is included on the GrantAID CD. Once the form is completed, click the *Submit by Email* button to automatically email the form to our Grants Office.

This form was designed in a read-only program that does not allow you to save changes to your computer. To keep a paper copy of the completed form for your records, click on the *Print* button at the bottom of the form once it is completed. Our office will send you an electronic copy of the form with your information filled in once you have emailed it to the Grants Office.

When there are changes at your Learning Center such as enrollment or board member changes, please update the information form immediately and email the updated copy to the Grants Office.

Step 3: Review a list of potential grantmakers with your Center Board.

The Grants Office in Lexington has resources available to help you identify grantmaking organizations. To receive a list of grantmakers in your area, contact the Grant Administrator. While our office is ready and willing to help you, nothing can substitute an awareness and knowledge of the community you serve. You may encounter potential donors in your community that do not surface in our research. Often your local newspaper will list local grantmakers who are currently accepting grant proposals or announce grants awarded to agencies similar to ours.

Once you have compiled your list of potential donors, review the list with the Learning Center Board at your next meeting. As you examine the names of the directors, board members, trustees and other decision-makers in a foundation, you may realize you already are acquainted with some of them. Personal contacts can open doors to receiving grants.

Step 4: Research your best prospects.

Grant-seeking is highly competitive, with grantmakers receiving many more requests than they

possibly can fund. Therefore, it is important to research thoroughly a prospective grantmaker to ensure that your Learning Center is consistent with the grantmaker's mission and focus.

The easiest way to find up-to-date information on a grantmaker is through an Internet search. Most grantmakers have highly informative web sites, often the source of downloadable guidelines and application forms. When researching potential donors, look at the following to ensure you are a good match.

- **Vision/Mission**
- **Geographic Focus**
- **Board of Directors**
- **Grants Awarded**
- **Form 990**

If you are having problems finding information on a grantmaker, contact the Grants Office.

Step 5: Contact the grantmaker.

If you feel it would increase your chances of receiving a grant, discuss your program with the grant contact person by phone as soon as possible. Often the contacts can indicate whether your program suits their current priorities and whether the amount you are thinking of requesting is appropriate. Nothing succeeds like personal contact, even if that contact is brief.

Depending on the foundation's style, a grants officer or foundation board member might be open to an invitation to visit your Learning Center on a typical class afternoon. However, *some grantmakers do not wish to discuss programs and applications with applicants*. They simply want you to follow their application guidelines and wait to hear their decision.

Step 6: Study the application guidelines.

Every grantmaker has different guidelines for submitting a grant. It is important to follow these guidelines precisely. Some grantmakers will want applicants to fill out their pre-application form or to send a Letter of Inquiry, which the grantmaker will review before requesting to see a full proposal. Others may want only a full proposal by a specific date.

Be sure to provide exactly what the grantmaker requires, including the correct number of proposal copies. Many grantmakers will reject applications that do not follow their guidelines – it is an easy way to cut the number of applications they must consider.

Step 7: Begin a grant status report.

Once you have identified a prospect, begin a grant status report regarding this grantmaker. This report is included on your GrantAID CD. Fill out as much information as you can and update the form as the status of the grant changes. Keep in mind that this report, like the Learning Center information form, cannot be saved with your changes. Click on the *Submit by Email* button once you have filled out the report to email it to our Grants Office. We will then email you the completed

report for your records. The grant status report is the simplest way for you and the Development Office to know where a grant stands at all times.

Step 8: Build your proposal.

The GrantAID CD contains several templates for you to customize into specific grant requests: the Letter of Inquiry, the Proposal and the Cover Letter. They follow a conventional structure that is acceptable to most grantmakers.

At the same time, keep in mind that these forms serve only as a guide. Often grantmakers will require you to fill out forms that are specific to their application process. In that case, adapt your existing proposal materials to the structure of the required forms. Feel free to rearrange and reword the proposal template to fit your needs.

Virtually all grantmakers will require additional support materials, such as a listing of your Learning Center's Board of Governors, a copy of your 501(c)3 letter and assorted fiscal statements. The GrantAID CD provides some support materials and allows you to create others.

Like all MS Word templates, the form letters, proposal, snapshot and news release will open as new untitled .doc files. When you start to customize these documents, be sure to save your changes on your PC. The templates also contain several words in red that need to be replaced with the appropriate content. Don't forget to change the red text to black when you have finished making changes.

Form Letters

The form letter templates will allow you to generate the letters you will write in a particular grant cycle. These letters are your opportunity to present the Learning Center's case in direct relation to the grantmaker's stated priorities. The templates should be used as guides. Feel free to edit the letters according to your relationship with the grantmaker.

- **Letter of Inquiry**

The grantmaker often suggests or requires a preliminary Letter of Inquiry (LOI). Signed by a designated Board member, the LOI briefly profiles the Learning Center and the problems it addresses in the community. Some larger grantmakers supply their own LOI form to fill out, much like a questionnaire. As you can tell from the opening, your template is based on a letter that was preceded by a phone call to the grantmaker contact. Be sure to eliminate any references that do not apply.

If an LOI is required, please email or fax a copy to the Grants Office.

- **Cover Letter**

The Cover Letter, likewise signed by the chief proposal contact, is addressed to the grants officer and accompanies the submitted proposal. It is an important opportunity to address

your grantmaker contact personally, if you are acquainted on that level, or at least to state your case more particularly than the generic proposal format allows. Adapt the template freely.

Proposal Template

The proposal is your opportunity to convince a grantmaker that your Learning Center's approach to helping children with dyslexia is a good investment of their funds. The Proposal Template is four pages long, with a fifth page introducing the Addenda which you will provide separately. Personalize the template and adapt it to the structure your grantmaker requires.

Keep in mind that the Additional Funding section at the end of the proposal should be adjusted to indicate only the funding sources that apply to your Learning Center.

Proposal Addenda

In addition to the proposal, your grant request should include the following:

- **Press Clippings, Publicity**

Publicity pieces serve as proof that your Center is doing good work and is valued in the community. If your Center has a recent clipping, have it reproduced on 8½ x 11 paper for inclusion in all proposals. Insert this material as the first page(s) after Addenda.

If your Center is new and you have no track record yet, substitute publicity around the Center's construction, opening, or dedication. If you do not have publicity, refer to the bullet below to create your own Learning Center Snapshot.

- **Board of Governors List**

In addition to the names, some grantmakers want to be able to see each board member's professional affiliation and community of residence. Your Board should have a traditional listing available. If a detailed listing is not required, add the names to the bottom of your Learning Center Snapshot.

- **Annual Budget Page**

Your Center's approved annual budget is a critical piece of any grant proposal. Just enter the numbers from your Center's current annual budget into the Budget Template on the GrantAID CD. The numbers should add up automatically (the template is an Excel spreadsheet), but double-check that the total matches the total in your existing printed budget.

- **IRS 501(c)3 Tax Exemption Letter**

The two-page official Exempt Letter from the IRS documents the Learning Centers organization's non-profit status under Section 501(c)3 of the federal tax code and assigns it a Tax Exempt Organization Identification Number. The document is on the CD and should be printed and included in the Addenda.

- **Tax Form 990**

Some grantmakers will also require a copy of the Learning Centers' Tax Form 990. This form is not included on your CD, but the Grants Office will send you a copy when needed.

- **Learning Center Snapshot**

A Snapshot Template is available on your CD and is designed to provide a personalized overview of your Center. If your Center is too new to have a record of accomplishment, try stating everything in an anticipatory mode.

The Snapshot contains "boilerplate" quotations ascribed to the Center Director. Although the ones provided in the template are adequate, it is greatly preferable for the Director to replace the boilerplate with original comments of about the same length.

If you have a better or more recent digital photo of your Learning Center than the standard picture on the template, insert it in place of the standard one.

At the bottom, fill in the names of the Learning Center Board members with the chair first. Include (if available) Board titles such as Vice Chair, Secretary, Treasurer, etc., after officers' names.

Include the one-page Snapshot with every grant proposal that you send out. It enhances the proposal with a touch of human interest that is specific to your Center.

The Grants Office must have a record of every grant your Learning Center is seeking. Once you are ready to submit the grant, please email or fax a copy of your completed proposal, including the Cover Letter and Addenda, to the Grant Administrator.

Step 9: Maintain the grant status report.

With each new development in the grant process, update the grant status report and send the updated version to the Grants Office. For example, if you learn that your grant has been accepted or denied, indicate this on the form. This process may seem tedious at first, but when you are working on several grants at once, it is impossible to remember the status of each one.

Step 10: Perform any necessary follow up.

Receiving a grant is not the end of the grant process. Often a foundation will require a letter or follow-up report explaining in detail how their funds were used. It is important to meet a foundation's requests so that your future grant requests are well received. If a letter or report is necessary, don't forget to email a copy to the Grants Office.

If you are awarded a grant, use the news release template on the GrantAID CD to construct a release for your local newspaper. A sample news release is also included on the CD to help you construct your own release. Adapt the template to your needs, including fresh quotes from your Center Director describing how the grant will help your Learning Center. Before releasing this information to the newspaper, be sure to ask the grantmaker for permission.