

Author: Kohlbeck, Derek D.

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STUDENT:

NAME: Derek Kohlbeck

DATE: 5/10/19

ADVISOR: (Committee Chair if MS Plan A or EdS Thesis or Field Project/Problem):

NAME: Julie Watts

DATE: 5/10/19

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Kohlbeck, Derek D. *Analyzing the Questions within the Wisconsin Grant Application Form*

Abstract

This paper analyzes the questions within the Wisconsin Common Grant Application (CGA) as well as methods for promoting the form as a teaching device to novice grant writers. A region of grantmakers within a state, region, or city adopt a CGA form for all grant writers to use. The form functions as a template for all grant writers, which makes the writing process more efficient. Nevertheless, not all grantmakers accept the CGA as a standard application because of complex guidelines their foundation has developed for selecting appropriate organizations to fund. I interviewed 9 grant writers from the Milwaukee and Manitowoc area and surveyed 9 grantmakers within the state of Wisconsin. They provided their perspective on the Wisconsin CGA for revisions as well as suggestions for promotion and education. Grant writers and grantmakers identified the Project/Program and Evaluation section for potential revisions. Furthermore, grant writers listed alternative options aside from a user guide. They preferred organizations and University as outlets within the state to promote the Wisconsin CGA. Solutions involve rephrasing or removing questions within the Project/Program and Evaluation sections. Tutorial videos accessed on the Wisconsin Philanthropy Network's website could assist grant writers in understand the Wisconsin CGA.

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Chapter I: Introduction

A Common Grant Application (CGA) form generally serves as a template for writing grants and is only adopted by a particular collective community of funders within a geographical region (Grantspace, 2018). Karsh and Fox (2014) explain how each CGA form varies from one area to another when examining structure, but all proposals ask to "...state a need, describe the program, present a rational budget, provide supporting materials that indicate the organization's capacity to implement the program, and document the organizations not-for-profit status" (p. 18).

The first CGA form appeared in the late 1980s (Higurea, 1996). Later on, Forefront, formerly named the Donors Forum in Chicago, decided to develop a CGA for nonprofit grant recipients (Edelhart, 1996). At that time twenty-three organizations accepted the common grant application to replace their own application (Edelhart, 1996). The design of the CGA form saved the grant writer's time by eliminating the monotonous process of writing numerous grant applications for different private foundations. Questions previously answered in the CGA form serve as boilerplates for the grant writer to snip, paste, and use in future grant applications. The CGA form shares similar questions that other grantmakers ask in their own grant applications (Smith and Tremore, 2008).

Two years later after Higuera and Elderhart's articles, the original Wisconsin Common Grant Application (CGA), created in 1998 by a small committee of funders and the Wisconsin Philanthropy Network (WPN), previously called Donors Forum of Wisconsin functioned as a standard template for grant-seekers (Bulgrin, 2018). Specific community funders within the state of Wisconsin only accepted the Wisconsin CGA form, particularly smaller family foundations and donor-advised funds use the form.

Statement of the Problem

Nonprofit organizations and grant seekers apply CGA forms as a reference and resource tool for reflecting back on questions during the process of writing a grant. This keeps them prepared and organized when tackling other grant applications for the future. However, not all corporate and private foundations accept the CGA within their own state, nor do all associated networks in some states and regions around the country provide an online CGA form for their grant seekers. New CGA forms continue to develop when grantmakers within a region decided to collaborate. There also exists a regional association of grantmakers comprised of local funders within a county or city. An example of this is the foundation Roundtable of Santa Barbara County, which designed their own CGA form to meet the needs of 11 grantmakers located within Santa Barbara County (the foundation Roundtable of Santa Barbara County, 2018) The Philanthropy Northwest CGA form, is one of few CGA forms in the country that encompasses multiple states: Alaska, Washington, Oregon, Idaho, Montana, and Wyoming (Philanthropy Northwest, 2018). The National Network of Grant Makers includes fifty large foundations around the country (The National Network of Consultants Grant Makers, 2018).

In Wisconsin, it seems unclear whether or not nonprofits or grant seekers know that a resource like the Wisconsin CGA exists. Beginning grant seekers learn about the Wisconsin CGA through word of mouth or taking seminars and workshops. Few studies analyze the effectiveness of CGA forms for both the nonprofits and the foundations. Researchers need to evaluate the questions within the grant to see how a CGA form meets both grant-seekers' and grantmakers' expectations. In addition, the Wisconsin CGA was only revised once in 2006. It is standard for states and regions to have revised their CGA once; however, a few changes occurred since 2006. They have not changed the Donors Forum of Wisconsin to the Wisconsin

Philanthropy Network (WPN) on the Wisconsin CGA. Lastly, the WPN website does not provide any additional online tools or information with the Wisconsin CGA that guides beginning grant seekers (www.WPN.org).

Only four states and regions in the country include a user manual or guide with their CGA: Missouri, Colorado, and Washington D.C. The Colorado CGA and the Missouri CGA user guides offer tips and things to consider in the introduction, cover sheet, narrative, and attachment sections/parts of the grant. The Western Pennsylvania (2018) grant includes tips at the beginning of the CGA form. The Council of New Jersey Grantmakers (2018) website offers special links to useful articles for grant seekers. A user guide for grant seekers acts as a centralized knowledge repository that allows them to access valuable resources and other information when undertaking grant projects.

Purpose of the Study

The research study will further explore questions within the Wisconsin CGA to determine the main reasons why all grantmakers and grant seekers sometimes do not favor the application form. The study will assist the Wisconsin Philanthropy Network to rethink and revise the Wisconsin CGA to better meet the needs of both the grantmaker and the grant writer. In doing so, more corporate and private foundations in Wisconsin may embrace the Wisconsin CGA form. Other philanthropy groups within other states/regions of the country may consider the possible benefits and adopt a CGA form soon. Currently, research on the CGA form does not exist anywhere, except for a few articles written in 1996 that provide the perspectives from grant seekers and grantmakers.

Assumptions of the Study

The Wisconsin CGA form needs minor improvements to satisfy the grant writers' and grantmakers' needs. My research will further illustrate the specific areas of revision that grant writers and grantmakers want revised within the form, whether it is structure, page length, font size, additional resources, or other pertinent information.

Definition of Terms

Below I listed and defined the essential terms for the Wisconsin CGA.

Common grant application. Serves as a template for writing grants, and is only accepted by a specific community of funders within a geographical region (Grantspace, 2018).

Glossary of terms. Provides the grant writer with a reference list of significant definitions.

Grant and organization's information. Requests general information on the grant and the organization.

Grantmaker. Corporate or private foundation who design the grant application.

Grant proposal narrative. Requests a description of the organization's program, how the organization evaluates the program, and what the funder will be funding.

Grant writer. Person who writes the grant.

Required attachments. Requests financial information.

Limitations of the Study

To find a potential foundation to participate in the online survey, I applied the Foundationsearch America directory from Metasoft. The search engine for Foundationsearch America generated roughly 3000 foundations in Wisconsin, but only 88 of them provided an email in the contact information section. Eight-eight participants yield a decent number for

collecting information on the Wisconsin CGA. These foundations may feel reluctant to participate in the online survey, therefore declining or ignoring the email I send. Larger foundations are hard-pressed with taking phone calls to answer questions, meeting and evaluating programs, reviewing thousands of letters and grant proposals. Out of the 88 foundations, I collected eight responses from the survey. The foundations that provide their email contribute a substantial amount of money to Non-Profits within Wisconsin, so their feedback is valuable; however, they do not represent a complete picture of the smaller and private foundations. I selected a suitable number of candidates for the survey; however, all participants I selected did not participate.

Methodology

For this research, I interviewed grant writers and grantmakers either face to face or phone to see what views they have on the Wisconsin CGA form. Aside from the interviews, I distributed an online survey to roughly 100 to 200 foundations within the state of Wisconsin. The survey included five questions. All names in the study (funders, foundations, and grant seekers) will remain anonymous in the survey and confidential in the interview. The interview will collect perceptions from grant seekers and grant makers.

Chapter II: Literature Review

Business articles written 22 years ago began to investigate and discuss the issues with Common Grant Application (CGA) forms. Edelhart's (1996) article records the opinions of the grant writers and the grantmakers in the Chicago area. Before the CGA, Edelhart (1996) cites from Noorani, the Mercy's director of development, that the funders wanted the "same information" but "presented in different ways" (p. 1). At that time 23 foundations accepted the CGA in the Chicago area to replace their own application, while others chose to customize their own grant application form. Other foundations remained undecided on whether or not to join the other 23 foundations or customize their own. The form took years to develop and address all the funders' needs, but still foundations reluctantly embraced it as their own form yet it failed to satisfy their own criteria. The benefits and the limitations of the CGA still seem prevalent in the philanthropic field today (Edelhart,1996).

The Benefits of the Wisconsin CGA Form

Knowing what resources are available gives the grant writer an advantage in grant writing. Sexton and colleagues (2007) briefly discuss in their study how the internet revolutionized the access of grant funding opportunities for grant seekers through advanced communication technologies. Today grant seekers possess the capability to search databases for foundations. These databases provided grant seekers specific foundations to target for contact information and guidelines. It allows the opportunity for nonprofits to connect to foundations and build a relationship. Popular databases such as Guide Star and Foundation's Center contain a donor 990-tax form which illustrates who the foundation funded and how much they funded. Davidson (2009) in her study noted that 10 out of the 14 participants used the internet when seeking funders. Internet databases allow grant seekers to filter out potential funders when

determining a match for foundations to pursue, saving not only their organization's time, but the funders time as well from answering questions.

One study investigates how the internet provides a competitive edge for grant writers (Lee, Chin, & Zhang, 2016) They list five advantages for nonprofits such as grant writing, donation and volunteer services, marketing, recruiting employers, and expanding their library of information without taking up physical space. These advantages still exist today with the internet. The Internet builds support for nonprofits through client, volunteer, and community networking who wish to help through contributions or volunteer (Kanter & Fine, 2010). Grant seekers can easily contact foundations with questions and foundations can easily respond through their own websites. Nonprofits can save paper and use hundreds of filing cabinets to keep their information organized. Foundations can easily upload their applications onto their own website and Grant seekers can easily download it. Grant writers have easy accesses to common grant application. They can download the application as a word document and fill in all the necessary information.

A number of grant writers begin with the common grant application when learning the basic fundamentals of grant writing. The Colorado Grant Application and Report functions as a great tool for studying and teaching the framework and components of a grant application (Community Resource Center, 2015). Essentially it teaches students core principles for formatting, guidelines, and what pertinent information they need. Only one study exists that employs the skills of grant writing to a CGA form. Falk (2011) had university students participate in a nonprofit leadership course that teaches grant writing. Falk (2011) exposed the students to the Associates of Baltimore Area CGA, but modified it based on the study. Unfortunately, Falk (2011) does not explain how the Associates of Baltimore Area CGA was

modified in the study. In the study, 20 students took a nonprofit leadership course that taught them grant writing. They had to select an organization, conduct interviews with directors, collect information and data, and then write the grant proposal. Once they finished their grant proposals, they had to present their proposal ideals. After students reflected on what they learned through evaluations and feedback, Falk (2011) mentioned the benefits and challenges each student confronted when writing their grants. Falk (2011) concluded the students gained positive and valuable experience from the study, which challenged and expanded their knowledge in the area of grantsmanship.

When filling out form after form, a common grant application saves time in the grant writing process for nonprofits. Bearman (2008) refers to a Rand corporation case study, where they calculated that one nonprofit organization spent 44% of their time writing proposals and reports for the funder. Higurea (1996) also explains how “feedback to date suggests that a common form does indeed make the application process easier on grantees” and also adds that it “...offers funders more consistent information for evaluating a pool of requests” (p. 26). Grant writers apply the CGA form as a reference tool for reflecting back on questions during the grant writing process (Higurea, 1996). The structural template of the CGA serves as a method for collecting, compiling, and managing existing information in a library of knowledge for a nonprofit organization.

Later on, the grant writer will then access and reuse the information for future grant applications, making the process more efficient (Gunning, September 2014). The extensive, common questions within the Wisconsin CGA act as a repository for grant writers to record and amass basic information on their nonprofit. This keeps the grant writer prepared and their thoughts organized for writing future proposals (Higurea, 1996). A number of foundations seek

similar, basic information derived from the CGA such as the organization's information, program project description, and evaluation. It saves time and reduces the labor of writing multiple proposals for multiple foundations. Directors of nonprofit organizations, who mostly write their own grants, have other obligations and responsibilities to fulfill rather than sitting at a desk filling out questions for a grant proposal (Higurea, 1996).

Davidson (2009) from Texas Tech University, interviewed 14 participants from multiple agencies to learn what methods they employ when handling the grant writing process. The questions ranged from the agency's basic information to their own experience with writing grants. Two grant writers spent 40% to 30% of their average time writing grants while five spent 10% writing grants. Davidson (2009) does not correlate this statistic to the number of employees or volunteers that work for the agency or if the agency successfully won any funding. However, Davidson (2009) noted that 5 participants in her study mentioned time and another five mentioned writing as one of the difficult aspects to writing grants. All participants reused their grant applications, but a number of them mentioned they needed to tailor their applications due to a number of reasons.

The aim of the CGA is to help nonprofit organizations invest time in developing relationships with grantmakers and not on formatting grant proposals (San Diego Grant Makers, 2018). A large percentage of an organization's success in winning the grant depends on building and maintaining a relationship with the funders rather than writing a grant proposal (Golden, 1997). Most foundations do not accept unsolicited proposal request forms from an organization they have no association with. Foundation Source surveyed 120 clients to know more about what family and private foundation expect from nonprofits (Snow, 2009). According to Snow (2009), 77 percent of the nation's family foundations do not accept unsolicited grant proposals. An

unsolicited grant proposal means the foundation is not opened to receiving a grant proposal from a nonprofit organization. The main reason is that they already have preselected their organizations before asking them to submit an application. These foundations wish to know the organization first before contributing to their cause. That is why board members dedicate their efforts to expanding relationships between the foundation and the non-profit, which sometimes takes time (Snow, 2009). In the grant writing process, grant writers have the overwhelming task of tackling numerous funders at a time who request an endless list of information (Bearman, 2018). When looking at the responsibilities for a director or board member, it seems impossible for them to carry out both.

Other times non-profits employ grant writers to write their proposals. In 2009, a grant writer, depending on his or her level of experience and success, earned anywhere from \$30 an hour to \$100 an hour (Bly, 2009). Whether the nonprofit organization is awarded the grant or not, they still must pay the grant writer (Bly, 2009). The possibility of hiring a professional grant writer does not always fit within an organization's budget plan (Gunning, 2015). Davidson (2009) confirmed in her study that one of the participants explained that 50% of the organization's financial resources goes towards grant writing.

The Limitations of the Wisconsin CGA Form

Despite the benefits of a common grant application, it presents a number of challenges. Higurea (1996) explained the problematic issues of each funder reaching a common consensus on the application form. Higurea (1996) and Edelhart (1996) emphasized that the CGA form fails to satisfy the funder's needs. Grantmakers prefer applications tailored to their foundation's own needs (Higurea, 1996). Information needed varies from one foundation to another, such as size, purpose, program, amount written, and page numbers (Higurea, 1996). Grantmakers

expressed that the CGA form does not ask the appropriate questions (Edelhart, 1996). Other grantmakers feel that particular areas in funding such as the arts and environment require different information from grant seekers (Higurea, 1996). For example, the Green Bay Community for Women's foundation solely funds women's causes, so questions within their application will focus on social issues involving women.

Throughout the years, CGA forms from areas of the country are constantly changing based on foundations' needs. A regional association of grantmakers, responsible for developing a CGA form, continues to revise the questions based on the grantmakers' needs. Edelhart (1996) noted in his article how grantmakers and grant writers' suggestions assisted with the development of the Chicago Donor's forum's common grant application. Similar today, the CGA forms continue to evolve throughout the country with constant revisions. The Wisconsin CGA form from 2004 contained an 11 pages limit for the narrative section, but in 2006 the Wisconsin Philanthropy Network reduced the limit to four pages (Hollis, 2004). Other regions in the country such as foundations in Colorado accept certain sections within the proposal (Community Resource Center, 2015). When considering and including all the needs of every funder into a single application, it becomes impossible for foundations to evaluate the nonprofit's proposed project or program.

Grantmakers develop criteria to ultimately determine their application's questions. This is the reason why grantmakers request detailed and complex questions within their own application. Leat (2006) has written and published a number of articles and a book on the subject regarding the foundations measuring performances of nonprofit organizations. She explains that criteria vary from foundation to foundation when evaluating projects, but each have commonalities in five categories: goals/missions, impacts and effectiveness, evaluation,

management and planning, value for money. Foundations wish to know the sustainability, community support, identified needs and how it will help the community (Leat, 2006). Leat (2006) continues to then outline the number of issues with criteria. Foundations apply criteria as a method to alleviate their anxieties and measure the organization's success. In her recent study, she discussed how grantmakers lean towards rationalism (Leat, Williamson, & Scaife, 2018). It is not just a gift of money but rather a strategic investment for foundations to make an impact (Leat et al., 2018). Grantmakers take risks when investing in nonprofits, so they need to ask the appropriate questions that align with their own needs.

Coffman and Beer (2016) examined how constant shifts occur within a foundation. These changes affect how a foundation evaluates nonprofit organizations. They selected three foundations for the study: the William and Flora Hewlett Foundation, the Walton Family Foundation, the David and Lucile Packard Foundation. When the evaluation changes, so does the questions asked within the foundation's application (Firman, 2019). These changes in the evaluation occur if a foundation decides to redirect their giving area, or relocate their foundation, decrease or increase their spending (Firman, 2019).

Moreover, Coffman and Beer analyze what the foundation should ask when matching an evaluation process that fits their scope and purpose. In the beginning, they discuss how no functioning model is right or wrong for assessing programs or projects (Coffman & Beer, 2016). They compacted the evaluation process into three basic questions for assessing a match: (1) what does the foundation need from the evaluation given, (2) how should the evaluation function and be structured and scoped, and lastly (3) what should the evaluation culture be? (Coffman & Beer, 2016). Coffman and Beer (2016) listed and laid out a number of principles under each of the questions above. Every foundation has an evaluation that contains different espoused values,

different types of strategy, different structures, and so forth when aligning with certain non-profits (Coffman and Beer, 2006). Their research demonstrates the diversification and similarities of how the structure within a foundation functions and changes, which reaffirms what Leat (2006) and Higurea (1996) previously mentioned.

Chapter III: Methodology

For the study I analyzed the Wisconsin CGA form. I interviewed grant writers and surveyed the grantmakers. The interviews and surveys offered the best method for gathering information and identifying potential areas for revisions. This study received Institutional Board Approval.

Subject Selection and Description

No particular populations were excluded from the study based on gender, race, or age. However, the interview portion of the study focused on grant writers from the Sheboygan, Manitowoc, and Milwaukee counties, while the survey focused on foundations within the entire state. The grant writer participants did not need any previous experience using the Wisconsin CGA form. I targeted nine grant writers that either worked as advisors for a nonprofit consultant firm or as directors of a nonprofit organization. The nine grantmakers who answered the survey questions worked as directors, officers, or trustees for the foundation.

Instrumentation

The research required the use of an online survey and interviews to gather information. Both the interview and survey consisted of open-ended and Likert based questions. This approach allowed for the integration of both quantitative and qualitative data. Using the two research methods provided the ability to produce solid results when representing trends from the participants. Questions in the survey and interviews asked participants to identify areas of concern, reveal their opinions on the guidelines, provide methods for decimating information grant writers on the Wisconsin CGA form. These questions looked for ways to improve the Wisconsin CGA for the grant writer and grantmakers, but also recognize its value in grant writing.

The Survey Procedure

To search for the foundations within the state of Wisconsin, I applied the Metasoft FoundationSearch, an online database that encompasses every family and community foundation in the country. The search results yielded roughly 3,000 foundations in the state of Wisconsin. Out of those 3,000, only 88 foundations provided an email contact for the survey. I included an invitation letter for the survey in the body of the email with the link to the survey (Appendix A). At the beginning of the survey, the foundations needed to read the implied consent before continuing on. I prepared an eight-question survey regarding the question in the Wisconsin CGA.

The survey was sent to the participants using Qualtrics anonymous link as well as anonymous response to ensure complete anonymity. I did not know which organization answered the questions. Results in the publication will not display any of the foundation's names within the list survey. The survey will not identify the individual foundation or the person representing the foundation. I sent the survey out again after 30 days and then a second time after 60 days. Once the survey reached 90 days, I closed the survey and extracted the data.

The Interviews Procedure

My supervisor, who directs a nonprofit consultant/philanthropic advising firm, provided me a list of potential contacts to interview. She had first contacted other grant writers to seek interviews. Over the years she had built relationships with the participants when working in the philanthropic field. She assisted me in selecting 10 to 15 participants based on their credentials and experience as grantmakers (corporate, community, and private funders) and grant writers (freelance grant writers and nonprofit directors). Participants did not need experience working with the Wisconsin CGA form.

Prior to the interviews, I prepared two scripts, one for the Grantmaker which consisted of 10 questions and one for the grant writer which consisted of 11 questions (Appendix B). First, I sent an invitation letter via email to the interviewees participating in the interview. I included the invitation letter in the body of the email with the consent form attached for the participants. Once the participants signed the consent form electronically or agreed via email to the interview, we then scheduled a time and date for the interview.

Participants had the option of a face to face interview in a private office area, over the phone, or via email. I conducted all interviews alone with the participants. These interviews ranged from 15 to 25 minutes, depending on how much the participants wished to discuss. They freely shared their opinions and thoughts regarding the Wisconsin CGA form, while I gathered the anecdotal evidence for the study.

Data Analysis

After I extracted the results from the survey and conducted all the interviews, I identified and interpreted any trends within the data.

Limitations

The interview section of the study concentrated on a specific area of the country and state when examining common grant applications. With the interview, the information gathered derived from participants living in the Manitowoc and Milwaukee areas. The interviews do not draw a large consensus from the entire state or nation. The survey does not equally represent the diversity of foundations in Wisconsin such as family, private, corporate, and community foundations.

A few grantmakers declined to participate in the research due to other engagements and responsibilities. Grantmakers who serve larger foundation must take numerous phone calls,

answer questions regarding guidelines, meet and evaluate programs, review thousands of solicited letters and grant proposals. The grant writers in my study were non-profit directors who write their own grants. They also oversee all of the organization's activities, which makes their time limited and valuable.

Summary

My research focuses on the question within the Wisconsin CGA and whether or not they meet the needs of both the grantmaker and grant writer. To investigate these questions, I collected information from grantmakers and grant writers through interviews and surveys. The study measures the number of participants who never worked with the application form as opposed to those who have worked with the application form. Overall the studies outlined in the literature review used not only interviews, but surveys as well. Higurea (1996), Edelhart (1996), Leat (2006), Coffman and Beer (2006), Falk (2011), Davidson (2009), and Gunning (2015) all interview participants and administer surveys in their studies to collect opinions and thoughts from both grantmakers and grant writers. Out of all these studies, Falk (2011) performed an experiment with grant writing students. Today the literature in grantsmanship focuses solely on grantmakers or the grant writers. I strived for a study that balanced the perspectives between grantmakers and grant writers.

Chapter IV: Results

The research analyzed the Wisconsin CGA to identify any areas of revision regarding individual questions or sections within the form. It further explores methods for advocating the Wisconsin CGA form to grant writers as a teaching device. Additionally, the study examines whether or not grantmakers will accept it if further revised. I interviewed 9 grant writers and surveyed 9 grantmakers in the state of Wisconsin. From the participant's responses, the study determined that questions within the Wisconsin CGA need minor revisions and methods for advancing the Wisconsin CGA as an educational tool. This study asks (1) What questions or sections within Wisconsin CGA need attention? (2) How do grant writers familiarize with the Wisconsin CGA?

Characteristics of Grant Writers

Occupation serves as an indicator for who nonprofits appoint as their grant writer. Directors constituted the majority of participants in the research. Only one consultant and one volunteer participated in the study. Directors also function as the grant writers of their own organizations. They know most of the information when writing the grants for their organization. Few organizations hire a professional grant writer or have a volunteer to assist them in the grant writing process.

Each participant's level of experience with a CGA form ranged from many years to none. Their experience indicates whether or not the state needs more education on the Wisconsin CGA form. Two participants had prior experience with the Wisconsin CGA form. Out of those two participants, one had a total of ten years' experience working with CGA forms. Some of the participants who never used the Wisconsin CGA said the form looked "vaguely familiar" while other said "they never heard of it."

Characteristics of the Grantmakers

A foundation can fit into a number of categories: family, corporate, or community. These foundations sometimes develop their own distinctive set of guidelines when assessing grant applications. Seventy-percent of grantmakers who partook in the survey were associated with private family foundations. Some corporations comprise of private foundations, so I'm unable to determine the grantmakers due to anonymity. One of the participants in the survey who selected other also added community foundation. The bulk of grantmakers in the survey do not use the Wisconsin CGA form as their application for grant writers.

Research Question 1: What Questions or Sections Need Attention?

The participants provided their thoughts on the overall cohesion of the Wisconsin CGA form. Sixty percent of the participants emphasized that the Wisconsin CGA does keep them organized, but they also associated it to other grant applications. One participant explained how "It seems to flow like a lot of other grant application form foundations." Some also explained how "it's a great tool as a starting point for grant writers learning how to write grants." None of the participants said it did not keep them organized, but those participants who seemed unsure and never used the grant application questioned whether or not it worked for various grant application with other requirements and requests.

The participants explained whether or not the Wisconsin CGA guided them in writing grant applications from other foundations. Sixty percent of the participants felt it helped them draft other grants, while 40% seemed unsure or did not answer the question. One participant who used it explained how "most of the questions are loosely based off these questions in the Wisconsin CGA form" and that it could "help a new person answer certain questions." Another participant who had no experience with the CGA recognized that "many of the questions are part

of grant applications I have written.” To answer this question, I focused not only what participants said how the questions connect with the Wisconsin CGA, but if the individual questions needed future revisions.

When asked about the Wisconsin’s CGA form’s questions, participants mentioned the Project/Program Description and Evaluation set of questions as an area for revisions. Participants felt that these set of questions either needed more questions, seemed repetitive, or were unclear. A few participants still felt the grant needed some clarification in other parts to eliminate questions that appear repetitive. Four participants pointed to the Project/Program and Evaluation section which contains a few similarities. A participant specifically stated, “It seems that the ‘describe the expected outcomes and the indicators for those outcomes’ under the Project/Program Description and ‘describe the criteria for success’ under Evaluation, are rather similar.”

An overwhelming number felt questions needed to be added to the application form. Participants suggested a number of questions to add in the application form. They desired additional questions for the Project/Program Description. Particularly, they wanted questions that asked for community support and collaboration. One participant answered that “the only thing that I might consider is how does the program enhance the existing services; how does this program collaborate with the community?” Other participants wished the CGA asked background information regarding the staff and volunteers work.” A Grantmaker added that “they wish to see what nonprofits pay all their staff members.”

The responses varied from participant to participant when asking what needed to be clarified in the CGA form. A trend could not be identified within the answers, but participants pointed to the evaluations and project/program description sections. A participant indicated that

“the Project/Program Description could be condensed and updated.” Another asked “What are they asking for with program budget? Do they want all of the budget? Or does it need to be dissected.” For the evaluation one participant said “We have goals and we also have outcomes. This could be the same but it also could be different.”

Question Two: How Do We Promote and Educate?

I wished to know whether or not a user guide seems practical for grant writers working with the CGA form. Everyone agreed a user guide would assist grant writers. Participants suggested various ideas on how to educate grant writers on the Wisconsin CGA form’s content beyond the user guide. A participant explained that “an online user guide would add clarity and assist novice grant writers with assistance.” Three of the participants named webinars, seminars, workshops, or online videos as alternative options aside from a user guide.

Next, I wished to explore options for promoting the Wisconsin CGA within the state. Participants listed university workshops and other organizations as popular methods for advocating the Wisconsin CGA form. In the interview, a participant mentioned that, “college workshops or seminars. It would be helpful if they received it before the workshop.” A participant recommended “other organizations like the Associations for Fundraising Professionals, who would spread the word of the Wisconsin CGA form.”

Chapter V: Discussion, Conclusion, and Recommendation

The research study supports both the benefits and limitations from the literature. The Wisconsin CGA has the ability to teach students the fundamentals of grant writing and save time. Foundations without a grant application form draw their questions from the Wisconsin CGA. Later on they edit and implement new questions based on their own guidelines. The document seems tailored for family foundations beginning their work in philanthropy. Other foundations are not willing to accept the Wisconsin CGA due to their own guidelines. This supports what Leat (2006) and Coffman and Beer (2016) mentioned in their research. This makes sense considering that the Wisconsin CGA only contains standard questions. A CGA still serves a significant purpose for not only grant writers but also grantmakers. Other states or regions without a CGA should develop one for their grant writers and grantmakers to use. Periodically, they can update and revise it based on what the majority of grant writers and grantmakers desire.

Discussion

Grant writers feel the Wisconsin CGA assists them in staying organized as well as drafting future questions for other grant applications. Few participants suggested significant changes to the Wisconsin CGA. Participants felt the page length for part two seemed adequate, the questions not repetitive, and the general instructions clear. Though participants wanted more questions added to the project/program description and the evaluation, specifically information regarding the staff, community support, and collaborations. Several of the participants pointed to the Project/Program Description as an area of the Wisconsin CGA that need revisions. Participants considered an added user guide as a helpful resource for understanding the Wisconsin CGA. In addition to a user guide, participants mentioned online instructional videos

as well as workshops for assisting students in understanding the basic grant application components

Grantmakers who participated in the survey stated that Wisconsin CGA meets their foundation's needs, but does not accept the application form. None of them would accept the Wisconsin CGA form in the future. The grantmakers who answered all the questions opposed any significant revisions or improvements in the Wisconsin CGA. One Grantmaker explained they use a rubric that solely aligns with their foundation's criteria. Another Grantmaker, who accepted the Wisconsin CGA, wanted more questions that asked information relating to staff members.

Conclusions and Recommendations

A number of participants in the study pointed out the Project/Program Description and the Evaluation section were areas that need attention in the Wisconsin CGA. They suggested a wide range of questions to add to this part, such as: Are there deficits within the project/program? Is the program/project new or proposed? Specifically, these additional questions related to information on staff members and collaboration support within the community. This information could be placed in part three of the appendix of the required attachments. One question asks for a complete list of the organization's officers and directors, but fails to expound on the major details. Foundations have a profound interest in knowing the director and other staff's brief biography because they reflect the non-profit organization's mission and values. Another question could relate to how the nonprofit organization collaborates within the community. Foundations request information on the relationships that a nonprofit shares with other organizations throughout the community. A question such as this reveals the nonprofit's commitment to the community.

A few questions within the Evaluation and Project/Program Description sections somewhat overlap. Outcomes and indicators of the Project/Program Description belong in the Evaluation subsection of the grant application. The questions “describe the criteria for success” and “describe the results expected to be achieved by the end of the funding period” sound similar to “describe the expected outcomes and the indicators of those outcomes.” Perhaps rephrasing and combining the indicators and outcomes with the last two questions of the evaluation would be clear. Alternately, one of the questions could simply eliminate the question to avoid confusion.

The study also looked at approaches to promote the Wisconsin CGA and teach beginning grant writers about the essentials of grantsmanship. One of the best ways to advocate the common grant is through workshops. Universities, associations related to philanthropy, and nonprofit consultant firms that offer philanthropic services tend to be the best option for hosting these workshops. The Wisconsin Philanthropy Network could produce an online YouTube instructional video for using the Wisconsin CGA with a writing guide to complement it. The guide and the video will cater to those who want something written or who wish to watch the video instead. The video could then be connected to the Wisconsin Philanthropy Network and Marquette University websites. These videos should be separated into individual videos that correspond to each part of the grant application form: Introduction, Grant and Organization Information, Grant Narrative Proposal, and Required Attachments. Beginning writers will have the option to select and access a video when working on a certain part of the Wisconsin CGA form.

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Appendix A: Interview Questions

Description: Thank you for taking time out of your schedule to partake in this interview. I'm hoping to gain your thoughts and opinions on the Wisconsin Common Grant Application. I hope you had some time to review the Wisconsin CGA form. Please have it with you during the interview as a reference. This interview should take no more than 10 to 15 minutes. Feel free to skip any questions you do not wish to answer.

1. Do you have experience working with the Wisconsin CGA form? Specifically, how many years have you used the grant? Or how many grants have you used it for?
2. Do you believe the Wisconsin CGA keeps you organized in your grant writing? Why or why not?
3. Do you believe your experience working with the WI CGA has helped you to draft other grant applications that do not use the Wisconsin CGA? Why or why not?
4. What questions do you feel are repetitive in the Wisconsin CGA?
5. What questions need to be added to the Wisconsin CGA?
6. What questions or parts in the Wisconsin CGA seem unclear or need updating?
7. What changes would you recommend to clarify the questions or parts?

8. For part three in the grant application, it asks to write five pages in length. Do you feel this is too long or too short, and if so why?

9. States such as Missouri, Colorado, Washington D.C. area, and Michigan all provide an online user guide to add clarity to the grant application process and to provide answers for general questions. Why or why not would a user guide help the grant writer?

10. This ties in with my last question. Does their need to be more instructions in the beginning of the Wisconsin CGA? What would you add to assist grant writers?

11. How do we provide non-profit directors and grant writers with the knowledge that the Wisconsin CGA exists?

Appendix B: Survey Questions

Description

Thank you for agreeing to take part in this survey. Today we will be gaining your thoughts and opinions regarding the Wisconsin Common Grant Application (CGA) form. This survey should only take 4-6 minutes to complete. Be assured that all your answers you provide will be anonymous.

Here I will add the Wisconsin Common Grant Application form file. For those not familiar with the Wisconsin Common Grant Application, please feel free to review the form or use it as a reference tool when answering survey questions.

1. Do you work for private or corporate foundation?
 - Private
 - Corporate
 - Other (write here)

2. Do you accept the Wisconsin CGA form?
 - Yes
 - No
 - We only accept some parts of the Wisconsin CGA form?

3. Does the Wisconsin CGA form meet your foundation's needs when reviewing potential non-profits to fund?
 - Yes
 - No
 - Not Sure

Here I will add skip logic to 5 if answer Yes

4. When reviewing the Wisconsin CGA form, what does not meet your foundation's needs?

This could be questions, sections, or guidelines.

Text Entry

5. Do you feel grant writers thoroughly answer the questions on Wisconsin Common CGA form?

- Yes
- No
- Not Sure

6. What areas in the Wisconsin CGA form do you feel needs improvement?

- General Instructions
- Part 1. Grant Requests
- Part 1. Organization Information
- Part 1. Population Served
- Part 1. Authorization
- Part 2. Organization and Background Information
- Part 2. Project program description
- Part 2. Evaluation
- Part 2. Founding Considerations
- Part 3. Required Attachments
- Glossary of Terms

7. Why do these areas need Improvement?

Text Entry

8. If revised, would you accept the Wisconsin CGA in the future?

- Yes
- No
- Maybe
- Not Sure
-

Appendix C: Wisconsin Common Grant Application form

WISCONSIN COMMON GRANT APPLICATION FORM

(Revised March 2006)

The Common Grant Application (CGA) can be used for all types of proposals: special projects, capital and general operating support. Please note that there are some differences in the information required, depending upon the type of request.

A list of the funders who have agreed to accept this form is below. Please keep in mind that every funder has different guidelines, priorities, application procedures and timelines. Contact each funder before starting the Common Grant Application Form to ensure that they accept the CGA and that all their requirements will be met.

Information about individual grant programs is available from each funder, and at the Marquette University Funding Information Center at Marquette University Raynor Library: (phone 414/288-1515) or www.marquette.edu/library/fic. Additional copies of the CGA may be obtained from the Wisconsin Philanthropy Network (formerly Donors Forum of Wisconsin) website at <http://wiphilanthropy.org/common-grant-application/>.

GENERAL INSTRUCTIONS

- The application has three parts. Be sure to complete each part.
- Type all proposals (minimum 10 point).
- Provide all of the information in the order listed.
- All questions relative to the request must be completed fully.
- Submit only one copy with numbered pages; do not bind or staple.
- Do **not** include materials other than those specifically requested at this time.

For specific questions about the Common Grant Application, please call the Wisconsin Philanthropy Network (formerly Donors Forum of Wisconsin) at 414-270-1978.

Grantmakers that Accept the Common Grant Application Form

(As of March 2006)

The following funders have agreed to accept the Common Grant Application Form. Other funders, not listed, may also accept the Common Application Form. *Before sending an application to any funder, be sure to check for their specific requirements.*

WISCONSIN COMMON GRANT APPLICATION FORM

PART ONE: GRANT AND ORGANIZATION INFORMATION

Grant Request

Total Amount Requested: \$ _____

Funder applying to: _____ Date Submitted: _____

Name of Project: _____

Duration of Project: from _____ to _____ When are funds needed? _____

Nature of Request: capital project operating program endowment

other _____

please list

In what geographical location will the funds be used? _____

Organization Information

Name: _____

Address: _____

City: _____ State: _____ ZIP: _____

Phone Number: _____ TTY: _____ Fax Number: _____

Email: _____ Federal ID #: _____ Date of Incorporation: _____

Chief Staff Officer (Name & Title): _____ Phone number: _____

Contact Person (Name & Title): _____ Phone number: _____

Board Chairperson (Name & Title): _____ Phone number: _____

Dates of Organizations fiscal year: _____

Organization's total operating budget for past year _____ and current year _____

Please list the organization's staff composition in numbers:

Paid full time _____ Paid part time _____ Volunteers _ Interns _____ Other _____

Total staff (both professional and volunteer) _____

Organization Information (cont.)

Has the governing board approved a policy which states that the organization does not discriminate as to age, race, religion, sex, disability, sexual orientation or national origin? Yes ___ No ___

If yes, when was the policy approved? _____

Does the organization have federal tax exempt status? Yes ___ No ___ If no, please explain on separate sheet.

Population Served

Please check the **primary** service category of organization (check only one):

Arts/Culture Health Human Services Civil/Economic Development Education Environment

Other (specify)

Provide percentages and/or descriptions of the populations the organization serves:

African American _____ Caucasian _____ Native American ___ Asian American _____

Hispanic/Latino ___ Other _____

please list

Authorization

Has the organization's chief executive officer authorized this request? Yes ___ No ___

An officer of the organization's governing body (such as a board member) must sign this application:

The undersigned, an authorized officer of the organization, does hereby certify that the information set forth in this grant application is true and correct, that the Federal tax exemption determination letter attached hereto has not been revoked and the present operation of the organization and its current sources of support are not inconsistent with the organization's continuing tax exempt classification as set forth in such determination letter.

Signature

Print Name/Title

Date

Remember to enclose all required support materials with the application (see Part Three).

PART TWO:

GRANT PROPOSAL NARRATIVE

Please provide the following information in the order presented below. Note that some sections are not required for general operating support. Refer to the glossary of terms (last page) as needed when preparing the narrative. Use no more than five pages; excluding attachments.

Organization Information and Background

- Provide a brief summary of the organization's mission, goals, history, programs, and major accomplishments, success stories and qualifications.
- Show evidence of client & community support.

Project/Program Description (NOT required for general operating requests)

- Abstract: Briefly describe the proposed program, how it relates to the organization's mission, capacity to carry out the program and who will benefit from the program.
- Explain the significance of the program and why the organization is qualified to carry it out.
- Describe the expected outcomes and the indicators of those outcomes.
- Document the size and characteristics of the population to be served by the program.
- Outline the strategy/methodology and timeline to be used in the development and implementation of the program.
- What is the plan to involve the population you intend to serve in the design?
- How does this program enhance the existing services in the community?

Evaluation

- Briefly describe the evaluation process and how the results will be used.
- Explain how the organization will measure the effectiveness of the program.
- Describe the criteria for success.

- Describe the results expected to be achieved by the end of the funding period.

Funding Considerations

- Describe plans for obtaining other funding needed to carry out the project/program or organizational goals, including amounts requested of other funders.
- If the project/program is expected to continue beyond the grant period, describe plans for ensuring continued funding after the grant period.
- List the top five funders of this project (if applying for a program grant) or organization (if applying for general operating support) in the previous fiscal year, the current year, and those pending for the next fiscal year.

PART THREE:

REQUIRED ATTACHMENTS

Submit the following attachments (in the order listed) with the completed proposal:

- 1) Complete list of the organization's officers and directors.
 - 2) The organization's actual income and expense statement for the **past** fiscal year, identifying the organization's principal sources of support.
 - 3) The organization's projected income and expense budget for the **current** fiscal year, identifying the projected revenue sources.
 - 4) The organizations most recent audited financial statement including notes and IRS Form 990.
 - 5) Copies of the IRS federal tax exemption determination letters.
 - 6) Program Budget (multi-year if applicable). *NOT required for general operating requests.*
 - 7) Grantee Report (if previously funded).
-

NOTE: This is the end of the Common Grant Application Form. Make sure you have completed **each** section of all **three (3)** parts of the application. A glossary is included on the last page for your reference. Please contact the Wisconsin Philanthropy Network (formerly Donors Forum of Wisconsin) if you have any questions about the application form. You must contact funders directly with questions about their guidelines, funding priorities, specific application procedures and deadlines.

GLOSSARY OF TERMS

(Please contact the Donors Forum if you have a question about a term not included here.)

Capital Request – A planned undertaking to purchase, build or renovate a space or building, or to acquire equipment.

Community – The people living in the same district, city, state, etc.

Contribution. A tax-deductible gift, cash, property, equipment or services from an individual to a non-profit organization. Most often given annually.

General Operating Support. Funds, both contributions and grants, which support the ongoing services of the organization.

Grants. Generally, an allocation from foundations, corporations, or government for special projects or general operating. May be multi-year or annual.

Indicator. The observable, measurable characteristic or change that represents achievement of the outcome.

In-Kind Support. A contribution of equipment/materials, time, and or services that the donor has placed a monetary value on for tax purposes.

Methodology. A sequence of activities needed to accomplish the program objectives.

Outcomes. The changes in (or benefits achieved by) clients due to their participation in program activities. This may include changes to participants' knowledge, skills, values, behavior, or condition of status.

Performance Standard. The number and percent of clients who are expected to achieve the result. Also called target, they should be based on professional judgment, past data, research, or professional standards.

Program. An organized set of services designed to achieve specific outcomes for a specified population that will continue beyond the grant period.

Project. A planned undertaking or organized set of services designed to achieve specific outcomes that begins and ends within the grant period. (A successful project may become an ongoing program.)

Success Story. An example that illustrates your program's effect on a client.