

Cheryl A.
Clarke

STORYTELLING

FOR GRANTSEEKERS



The Guide to *CREATIVE*
NONPROFIT FUNDRAISING

Second Edition

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Praise for *Storytelling for Grantseekers*

“Cheryl’s unique approach, using storytelling to develop highly effective and competitive grants, is why I recommend her book to all my students.”

—Vivienne French, part time faculty, Truckee Meadows Community College, Reno, Nevada

“Cheryl Clarke breaks down the steps of writing a successful grant proposal and makes the entire process as natural as that of sharing the story of all the good work that our organizations do in the world. A must for both new and seasoned grantseekers.”

—Dorotea Reyna, director of development, California Institute of Integral Studies

“I eagerly await the new edition of *Storytelling for Grantseekers*. My first edition is worn out from good use.”

—Jean Therrien, executive director, Neighborhood Family Practice, Cleveland, Ohio

“Grantwriters looking for simple rules for writing a winning grant proposal should read Cheryl Clarke’s book *Storytelling for Grantseekers*. Clarke’s book is easy to read and follow, and her contention that grantmakers will be persuaded by a compelling story that demonstrates both knowledge of program and need for funding is spot-on.”

—Catherine Fisher, trustee, The Thomas J. Long Foundation

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Storytelling for Grantseekers

**A GUIDE TO CREATIVE
NONPROFIT FUNDRAISING**

SECOND EDITION

Cheryl A. Clarke

Foreword by Frances N. Phillips

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FOREWORD

In the early twentieth century, foundations set out to apply the rigors of science to solve society's problems. That is why I have long told grantwriting students that they would find the structure of a grant proposal familiar—similar to a basic scientific paper. It proposes a hypothesis (in its problem statement and objectives) and then outlines the methods that might be tested to achieve a result.

For nearly twenty years, I have been teaching grantwriting at San Francisco State University, and for years my students have looked muddled and sad upon hearing the science paper analogy. I remember finding evidence of their dismay in an e-mail from a talented student who was dropping the class because “the material was inherently dry.” I found grantwriting fascinating, but I needed a new way to pass on my excitement.

Enter *Storytelling for Grantseekers*. In 2002 I was having lunch with a friend whose career had taken her back and forth “across the desk”—from working as a grantwriting consultant to working for a foundation and then back again to grantwriting. She told me about the first edition of *Storytelling for Grantseekers*. “It has revolutionized my grantwriting,” she said. “I didn't think I could slog through another proposal, but I've really enjoyed the last two I wrote.” On that recommendation, I hurried out and bought a copy, which I now use in my teaching.

Since reading that book, and now this second edition, I've come to appreciate that among the many fine books on grantwriting available, *Storytelling for Grantseekers* is

distinctive in its goal to change our approach to the *writing*. While other texts may linger over the nuanced differences between objectives and outcomes or decode elaborate evaluation techniques, Clarke cheers her readers along as writers. I find her approach valuable—both for reluctant writers who need warm-up exercises and structured lessons to shove us beyond procrastination, and for seasoned grantwriters who get caught up in florid jargon of our fields and end up burying the main point. She asserts that a good proposal will convey a story—even if it is a proposal seeking support for a sophisticated bit of scientific research—and a good story is highly readable.

Though I worked for years in small nonprofits, I now spend the greater part of my work day as a senior program officer at a foundation. Some of the traits I value most in communicating with grantseekers are candor and honest self-reflection—nonprofits that tell the truth. One critical point to remember in heeding Clarke's advice to grantwriters is that we can enliven our writing by using the same techniques we would use in writing a good piece of fiction, but we should not fictionalize. An organization's truthfulness is essential to earning the trust of donors and foundations. Nevertheless, Clarke points out that a good proposal will feature heroes (and many, many nonprofits and their leaders are truly heroic), conflicts (the challenges of addressing society's most pressing problems), and inspiration (the visions those organizations maintain in their work).

If I were to sum up *Storytelling for Grantseekers*, I would say it is about the importance of readability. As a grantmaker, nearly every week I face stacks of proposals with varying degrees of readability. The good proposals make a clear point and substantiate it by putting their organization and ideas in context. They bring their characters to life—both leaders and constituents—and they

enable me to recognize the value and meaning of their efforts. At the end of a good proposal, I am inspired. When I go to visit the organization and observe its work, I hope to find a clear correlation between the story they have told and the project I am observing.

My work is filled with good proposals and many that are less readable. Size and sophistication of a development department do not necessarily correlate with readability: some of the best ones have been written by volunteers. And while a project is not judged solely by the quality of the proposal writing, it is much easier for a program officer to work with and argue for a well-written document. As Clarke acknowledges, program officers' work often involves not only reviewing proposals, but also presenting arguments to other staff members and board members on behalf of the organizations submitting those proposals. The best thing a grantwriter can do is to arm foundation staff members with clear, honest, readable information so that they too can tell the organization's story—usually in a highly condensed form.

Storytelling for Grantseekers also walks its talk. Clarke's narrative is itself lively and highly readable. She provides examples illustrating her points and exercises to prime her readers' proposal writing. She also summarizes each chapter with a list of its key points, making it easy to follow the thread of the story she is telling us. And she answers the practical questions students and grantwriters always ask, such as, How long should this section be?

An air of mystery hovers around grantseeking—especially in the myth that only a handful of people have the inside track and know the tricks of the trade. It is true that decoding the preferences of foundations and striking up professional relationships with program officers and trustees comes with experience, but a good grant proposal in itself is

not one bit mysterious. That's why I applaud the book you are about to read: it's not about the mystery or the science of grantwriting, but about the essence of good communications. Clarke has shaped a sophisticated yet highly readable volume, rich with examples, good humor, and stories.

September 2008

Frances N. Phillips
Instructor, Technical and Professional Writing,
San Francisco State University
and
Senior Program Officer,
The Walter and Elise Haas Fund

I dedicate this book to Richard, who steadied the
helm at home so I could focus on my writing; to Hannah,
who rocked the boat just enough to remind me of what's
really important
in life; and to the memory of John and Lee for their
dedication to
community service, which inspires me every day.

PREFACE

Storytelling is a powerful art form. Stories entertain, educate, and enlighten. They have the ability to transport an audience to another location and teach them about issues and people they may know nothing about. The same is true of grantwriting.

Yet many nonprofit and development professionals, both newcomers to the field and those with years of experience, contemplate the task of writing a grant proposal with as much enthusiasm as they would taking a trip to the dentist for a root canal. Those who are new to the field are likely to approach grantwriting with a “deer in the headlights” stare. The process seems daunting, intimidating, frightening. Those who have been in the nonprofit sector for a long time too often grudgingly accept grantwriting as a necessary chore, a boring task to complete in order to get to perhaps more enjoyable fundraising activities like soliciting major donors, drafting appeal letters, and organizing special events. For these folks, there is no joy in preparing a proposal; it is just something to get done, like making your bed and washing the dishes.

I have observed that only a rare few actually delight in seeking grants and writing grant proposals. I am one of these uncommon individuals. I wrote the first edition of this book to help my development colleagues get excited about the grantseeking area of fund development and to put the joy and creativity back into the grantseeking process. Considering the number of people who have contacted me after reading the first edition of my book, I think I

succeeded. Dozens of times, I heard that *Storytelling for Grantseekers* inspired and informed grantwriters of all levels of experience. Better still, I heard from several who credit *Storytelling* with helping them secure a grant. There's no sweeter news than that!

When I was approached by my editor to work on a new edition of *Storytelling*, I didn't hesitate to agree. The book was ready for an update, though the message of *Storytelling* is still valid and will be a fresh concept for many in the nonprofit field.

The nonprofit field is dynamic, and technology is ever changing; I wanted an opportunity to acknowledge the changes and comment on them. Probably the most significant change in the grantseeking field over the past eight years is our use of the Internet. Today, we routinely use online technology to research funders, review and download guidelines, and submit proposals. In this second edition, I cover Internet issues in much greater depth than I did previously. Responding to reader requests, I also added new proposal excerpts from a wider range of nonprofit agencies (from grassroots groups to large institutions), and I included two full letter proposal examples in the Appendix. Finally, I reorganized a few chapters and added two new ones, and I tried to smooth out some rough grammatical spots.

I work in the nonprofit sector because it allows me to contribute in a meaningful way to my community. I suspect that the majority of you who read this book have chosen to work in the field for the same reason. It is our passion for the work, not the brass ring of stock options or growing retirement accounts, that keeps us going. Yet it is precisely this passion that is most often missing in grant proposals. My goal is to put the passion back in proposal writing!

I believe that you will be more enthusiastic about writing proposals, and your proposals will be more passionate and consequently more effective, when you begin using the storytelling technique described in this book. No doubt, this approach will be entirely new and different from the ones most of you are currently using.

For too many years, grantwriting workshops and how-to books have emphasized only the mechanics of writing grant proposals. For example, workshops and textbooks are good at covering such topics as the essential components of the proposal narrative; the definitions for outputs, process outcomes, impacts, goals, and objectives; and how to craft a program budget. But too many development professionals come away with glazed eyes after attending these workshops and reading such books. Grantwriters become overly concerned about technique and form. What's missing are the creativity and passion. That's what the storytelling approach puts back into the grantwriting process.

Whether you are a grantwriter, development director, executive director, board member, or volunteer, I hope you will come to the realization that grantseeking is as much a creative exercise as it is a technical one. By and large, grantwriters tell stories. There is great drama and excitement in our proposal stories. Telling a story is powerful. Writing a grant proposal is the telling of a powerful story.

CONTENT AND ORGANIZATION OF THIS BOOK

I begin with an introduction that discusses how the storytelling approach to grantseeking was developed and why you (and your agency) will benefit from using this method.

Yet before anyone sits down to write a proposal story, there are some preparatory steps to take. Chapter One describes what you and your agency should be doing to get ready for the grantseeking process. In Chapter Two, I offer guidance on how to effectively and efficiently research and identify your agency's target audience—that is, funders most likely to award a grant. This chapter also covers the broader topic of grantor-grantee relationships, from courtship and cultivation to stewardship.

Chapter Three is new. Although I covered letters of inquiry in the previous edition, the discussion was brief and somewhat buried. Because letters of inquiry are so widely used and often a critical “first step” in the grantseeking process, they deserve their own chapter.

Chapters Four through Seven demonstrate how to present your agency's story effectively in a proposal narrative. I believe that creative storytelling can be woven into the traditional proposal narrative form, as well as in online applications, and these chapters show you how this can be done. Chapter Four begins the sequence of chapters with a discussion of the importance of an opening “hook.” From there, your story will progress to an introduction of the characters (the story's protagonist and other main characters) and the setting where your story takes place (location). In Chapter Five, I reveal what (not who) the antagonist is in our proposal stories and provide suggestions for fully developing this “character.” In this part of your proposal stories, conflict is introduced and tensions mount. Chapter Six discusses the goals and objectives that will bring a full or partial resolution to the conflict. The evaluation and future funding sections in a proposal can be considered your story's epilogue and sequel; these sections are covered in Chapter Seven.

Proposal stories are not just told in words. Chapter Eight explains how to translate your agency's narrative story into the language of numbers in an accompanying proposal budget.

Once the full proposal story is written, it must be "marketed." In Chapter Nine, I cover the marketing elements of a proposal, namely the summary, titles, and headings. Chapter Ten follows with a discussion of the proper "packaging" of a grant proposal, including what attachments to enclose and what delivery method to use.

Because our proposal stories are often transformed to "live theater," I added a new chapter (Chapter Eleven) devoted to site visits and to the communications we have with funders while our proposals are pending and after a decision has been made. Finally, Chapter Twelve (also new) addresses the topic of how grantwriting skills are transferable to other fundraising areas and even outside the nonprofit field.

Whenever possible, I have included examples from actual grant proposals to illustrate the concepts presented in this book. These proposal excerpts are the works of several excellent writers, who are credited in the text for their work, and myself. In some circumstances, agency names have been changed to respect the wishes of the agency.

In the course of writing this book, what I have learned by rereading my own grant proposals is that I have not yet written the absolutely perfect proposal. And I believe that my talented colleagues would agree that they have yet to write one either. Has anyone drafted the perfect proposal? Has any author ever written the perfect book? I am pleased when I have come close to approaching perfection, and with every proposal I write, I continue to strive for that ideal.

I wrote this book because I have an interesting, compelling story to tell. I hope that in reading this book, you will see that you do too. I wish all readers happy, successful grantseeking!

September 2008

Cheryl A. Clarke
Mill Valley, California

ACKNOWLEDGMENTS

The very best stories succeed because the action is propelled forward by strong, intelligent, and charismatic characters. I was extremely fortunate to have just such a wonderful cast to assist me in making this book a reality, and, therefore, I have several people to thank.

First Edition

Marian Breeze saw the potential and gave me unflagging encouragement during the writing of the first edition and the editing of the second. Initially, Marian was going to play a much larger role in the creation of this book; however, motherhood intervened, and she needed to direct her energies to caring for her family. Still, Marian faithfully read my drafts during this busy period in her life when she had precious little extra time. She generously provided thoughtful comments and asked insightful questions. I am deeply indebted to Marian and thank her for sharing her knowledge of the nonprofit field, offering her well-honed editing skills, and, most of all, having a delightful sense of humor.

I also thank Guy Biederman, my fiction writing instructor. Under Guy's tutelage, I learned much about the craft of writing good short stories, and I apply this knowledge when preparing grant proposals. When I was first toying with the idea of this book, I spoke with Guy about the important role storytelling has played throughout civilization. Our conversation helped convince me that I really did have a story to tell.

Mary Gregory and Dorotea Reyna read and critiqued early drafts of my manuscript, and I thank these dear friends and colleagues for the time they spent doing so. They will see that I incorporated many of their helpful suggestions in the final product.

I deeply appreciate and thank each of the nonprofit agencies that gave me permission to reprint portions of their grant proposals in this book. I also acknowledge my inspiring colleagues who generously shared their proposal narratives with me. They are Marta Johnson and Roberta Swan (Philanthropy By Design), Nora Hirschler, MD (Blood Centers of the Pacific), Rochelle Nason (League to Save Lake Tahoe), Clifford Janoff (Bay Area Ridge Trail Council), Barbara Brenner (Breast Cancer Action), and fundraising consultants Susan Fox, Nancy Quinn, and Laura McCrea. My special thanks also go to Cindy Rasicot and Jo Wegeforth for ceaselessly providing me with good cheer along the way.

Polishing a draft into a final manuscript can be an arduous task. I thank editor Johanna Vondeling for her gentle persuasion and generous support.

Lastly, I thank the “breakfast bunch”—Laura McCrea, Lee Follett, and Pamela Cook—for patiently enduring a year of my almost total devotion to this project. The fact that we continued to eat blueberry pancakes together is proof that the best friendships can survive the writing of a book.

Second Edition

A new edition means I have some new people to acknowledge and thank. At the top of the list is Susan Fox, my colleague, coauthor, and friend. I appreciate her wisdom and wit, her encouragement and support.

Once again, my colleagues (and the agencies they work for) came through for me, answering my call for new proposal examples and excerpts. In fact, I had so many responses that not all were able to make the “final cut.” Yet all are deeply thanked: Marie Beichert (Ella Baker Center for Human Rights), Toni Doyle, Carol Lena Figueiredo (New Door Ventures), Susan Fox (St. Francis Center and Lion’s Center for the Visually Impaired of Diablo Valley), Judy Kunofsky (Petaluma Bounty and The Other Bar), William Masterson (California Society of Jesus), Yvonne Prouse (Jesuit Volunteer Corps), Eleanor Smith, Jennifer Yeagley (LightHouse for the Blind and Visually Impaired and Child Advocates San Antonio).

I had the good fortune once again to work with a talented editor, Allison Brunner, whose energy and enthusiasm brightened my days at the computer.

Finally, I thank all my clients over the years: your work is inspirational, and I am grateful to have had the opportunity to craft your proposal stories.

THE AUTHOR

Cheryl A. Clarke is an accomplished grantwriter and storyteller. Based in the San Francisco Bay Area, Cheryl is a fundraising consultant, trainer, and speaker who has helped hundreds of nonprofit organizations raise money in awarded grants and philanthropic contributions. She is also an award-winning writer of short fiction.

A self-described “recovering lawyer,” Cheryl graduated from Northwestern University with a bachelor of science degree in journalism, and received her law degree from the University of San Francisco School of Law. While practicing law, she joined the board of directors of a nonprofit organization and discovered her real career passion. Within a year, she had made a successful career transition and was appointed the director of development and alumni relations at the University of San Francisco School of Law. She has also held fundraising positions at the University of California-San Francisco and The Marine Mammal Center. She is a member of the Association of Fundraising Professionals and Development Executives Roundtable.

With Susan Fox, Cheryl coauthored *Grant Proposal Makeover: Transform Your Request from No to Yes* (Jossey-Bass, 2007) and is a contributing author of *Team-Based Fundraising Step by Step* (Jossey-Bass, 2000). Her short stories have been published in several literary magazines.

In addition to writing, Cheryl enjoys teaching. She conducts webinars and workshops on fundraising techniques, board development, and grantwriting. She is a much sought-after keynote speaker and presenter, having

presented workshops at several local and international conferences of the Association of Fundraising Professionals and the national conference of the American Association of Grant Professionals.

Introduction

Why Storytelling?

From the beginning of time, people have communicated their ideas, values, and lessons through stories. At first, stories were told in the oral tradition, often over an evening fire, and passed along from generation to generation. Some stories were later depicted through pictures drawn on cave walls or carved into stone. Over time, our ancestors developed written forms of language and began to memorialize their stories in writing.

The power of both true and fictional stories is demonstrated throughout history and literature. For example, in the Bible, Jesus uses parables—narrative short stories—to convey a double, or metaphorical, meaning. In the Greek tradition, fables and myths are impossible fictional stories that communicate a deeper, again metaphorical, message. *Beowulf* and *The Canterbury Tales* are early epic tales that provide fictionalized accounts of historical (or at least partially historical) events.

Regarding the significance of storytelling throughout the history of human-kind, Joel Orosz, author of *The Insider's Guide to Grantmaking* (Jossey-Bass, 2000), says, "In history, great leaders aren't necessarily the smarter people; they're just the ones who tell the best stories" (personal communication, 2001).

People always have used stories to inform, instruct, and persuade others. And storytelling is very much alive today.