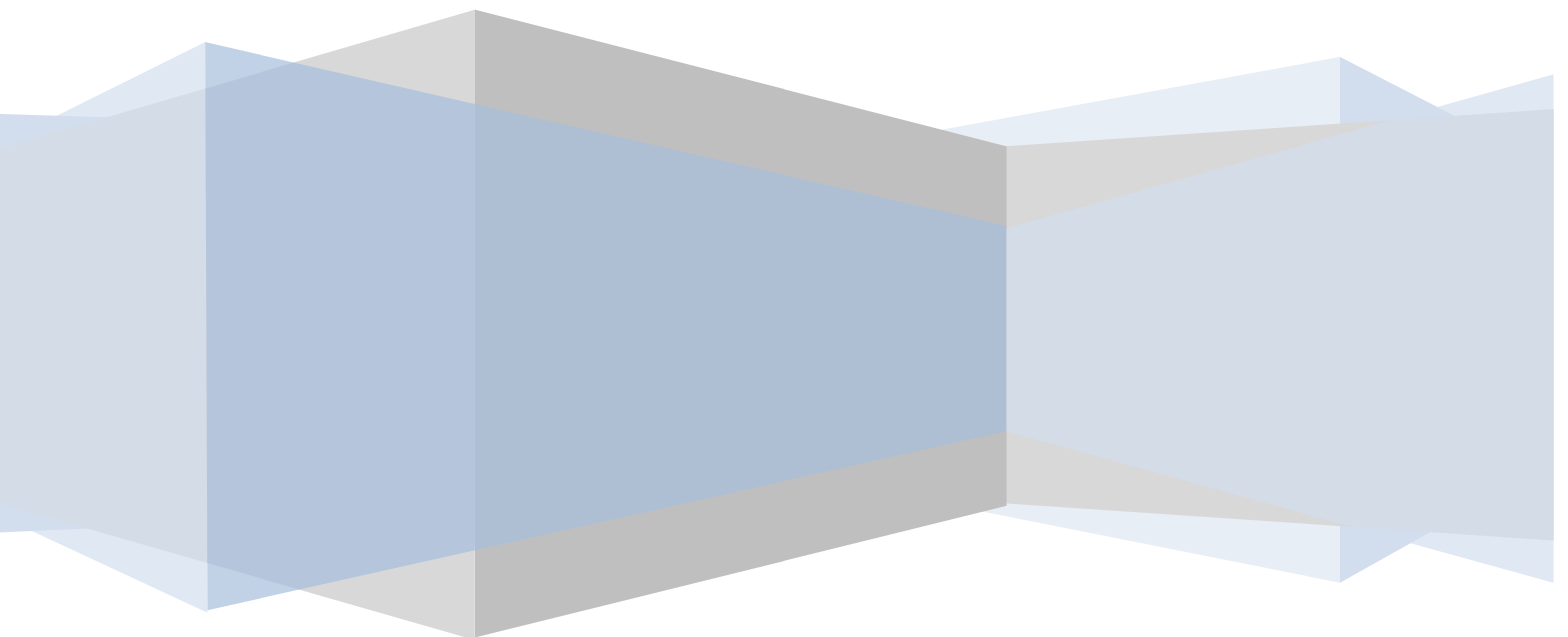


D B Pyoas & Associates, LLC

# **RESPONSES TO FREQUENTLY ASKED QUESTIONS**

**QUESTIONS FROM PERSPECTIVE CLIENTS**

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1. If we lay out our priorities, strategic plans, and budget to you, what role do you perceive those grants might play in achieving them?

Strategic planning is critical to the long-term success of your organization. Strategic planning identifies where the organization wants to be and how it will get there. The "strategic" part of this is the continual attention to current changes in the organization and its external environment and how this affects its future.

D B Pyoas & Associates can assist you with your strategic planning efforts. We will help you formulate a plan that includes the following:

- a) Take a comprehensive examination of external factors and how they might impact the organization (an environmental scan)
- b) Take a detailed look at what's going on inside the organization, including its strengths, weaknesses, opportunities, and threats (a SWOT analysis)
- c) Establish statements of mission, vision, and values
- d) Establish goals to accomplish over the next three years based on results from the environmental scan and SWOT analysis
- e) Identify how those goals will be reached (strategies, objectives, responsibilities, and timelines)

If these action items have already been done, we will utilize them to help you best reach your organizational funding benchmarks. We understand that strategic planning determines the overall direction and goals of the organization. Consequently, strategic planning influences numerous aspects of the organization, including:

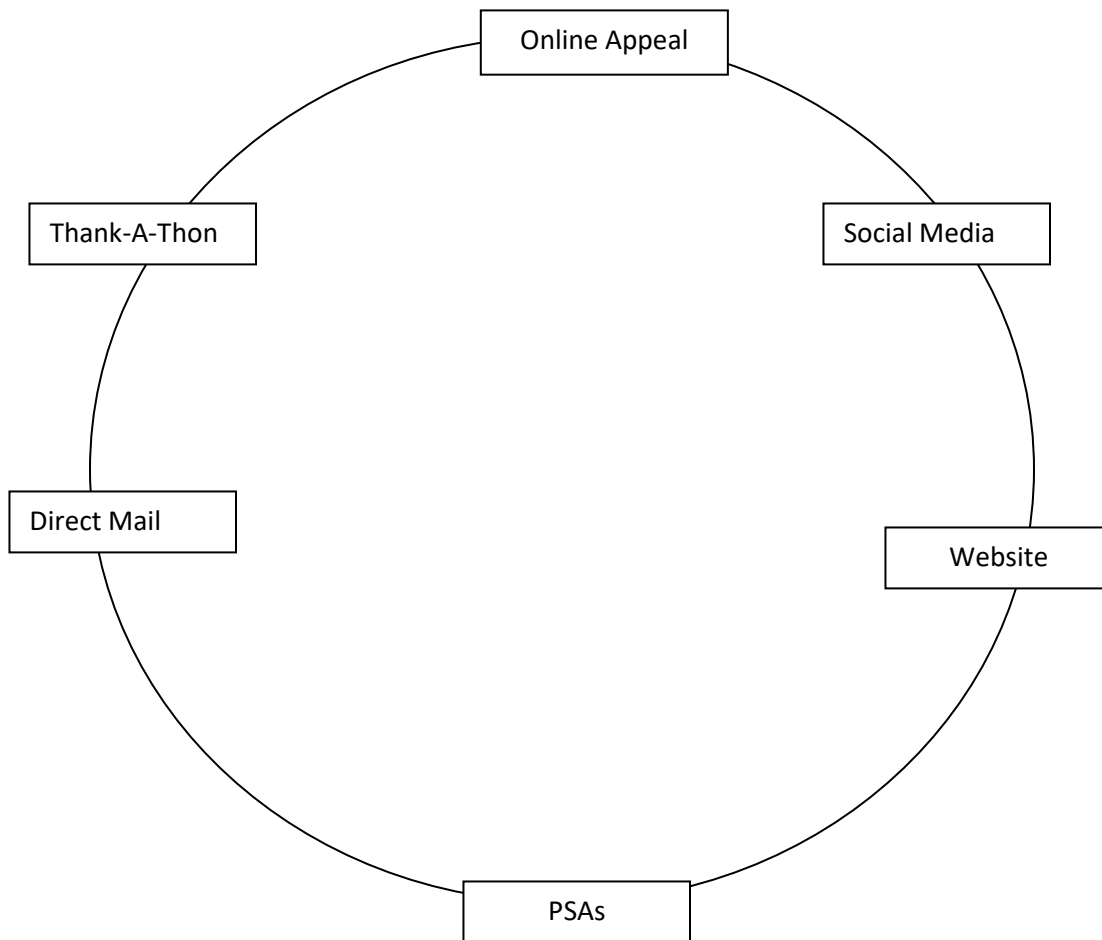
- a) Services provided by the organization and how those services will be implemented
- b) Organizational design and roles
- c) Performance goals for positions throughout the organization
- d) Board committees developed (where appropriate)
- e) Resources needed to reach goals and monies needed to procure resources -- ultimately, the goals determine the content of various budgets

This last statement dovetails with how funding, grant solicitation, your organization's strategic plan (priorities, goals, and objectives), and budget achieve true synergy. Once these salient issues have been addressed and identified, the campaign strategy D B Pyoas & Associates will design for you will be consistent with your organizational thrust. A protocol will be established that is planned and well thought out to effect consistency and continuity throughout the lifecycle of not only the specific project or program but, equally important, your organization's mission, vision, and values.

2. Have you developed an outline of your strategy to help us achieve our funding objectives?

Yes, D B Pyoas & Associates recommend (based solely on the information provided to date) an integrated multi-channel fundraising campaign. This effort involves coordinating the timing of multiple fundraising channels, including but not limited to direct mail, online, telephone, and social media. Our strategy will incorporate such action items as a group age-specific capital campaign, frequent website updates, online donation forms, print communications, speaking engagements, and mission tours.

### Integrated Multi-channel Campaign



3. What's your estimated Success Rate over the past 24 months?

D B Pyoas & Associates achieved an 86% success rate in securing grants for our clients.

4. What's your number of Funded Grants over the past 24 months? And who funded them?

Over the past 24 months, we have secured 11 client grants. We have received funding from such organizations as the City of Charleston, the American Association for the Advancement of Science, the National Oceanic and Atmospheric Administration, and the Charleston County government. D B Pyoas & Associates take pride in our high success rate in receiving funding for our clients. We are more concerned about providing quality service with a direct approach that our clients require and appreciate. Also, understand that there was a change in basic assumptions within our company as we focused on small business development. We realized financial growth in our business efforts; however, grant writing and fund development have always remained the fodder of our company.

5. Explain your proposal development process.

D B Pyoas & Associates, LLC's approach to proposal development involves good planning and communication. A solid case must be built to identify, verify, and document your needs.

First, we begin the process by conducting a needs assessment. Within the needs assessment, we address the following questions:

- What data are needed?
- Who will be assessed?
- Who will do the assessment?
- When is the data needed?
- How should the data be collected?

An analysis of the data follows the needs assessment, the priority of identified needs, and, if appropriate, a plan developed using the data in the grant application.

Second, after analyzing and interpreting data from the needs assessment, we examine the diverse options, available resources, objectives to be accomplished, and various activities best suited to meeting these objectives. To the maximum extent possible, we conduct due diligence to ensure that we learn as much as possible about what has been tried by others in addressing your identified needs. By reviewing published material and examining existing projects related to your needs, we determine if your idea is feasible or if another approach might be more appropriate. This information can strengthen the proposed project and provide a more substantial rationale for funding. Taking the time and effort to research the idea demonstrates interest, knowledge, and experience in resolving your identified needs.

Third, we begin crafting the first draft of the proposal.

Fourth, after the first draft has been written, it undergoes a series of internal reviews before submitting it to the client. One critical internal review step involves a review of the proposal by

people other than the writers and, preferably, by people unfamiliar with the project. This will allow for necessary revisions to make the bid more accurate, understandable, or convincing. A final review is conducted with the client to find incorrect calculations, omitted cost factors, and other budgetary mistakes or inconsistencies.

Last, after gaining the required approval from the client, the application is ready to be submitted.

6. Discuss a "Challenging" funding experience?  
All funding experiences are challenging; some are less challenging than others. However, securing funding poses barriers when dealing with a newly designated 501 (c ) 3 with no history and internal challenges within the organization. D B Pyoas & Associates guided such an organization through the necessary strategic planning steps, including developing its mission, vision, and values statement. Additionally, we continued collaborating with the client and assisting with advisory board development. In the end, this organization is currently a striving and viable non-profit.
7. How do you determine the right grant Funders to approach?

**Approach #1**

I take a two-prong approach. The first is an operations/systems approach to determine the right grant funders for an organization. This process begins by asking four questions listed below. They are:

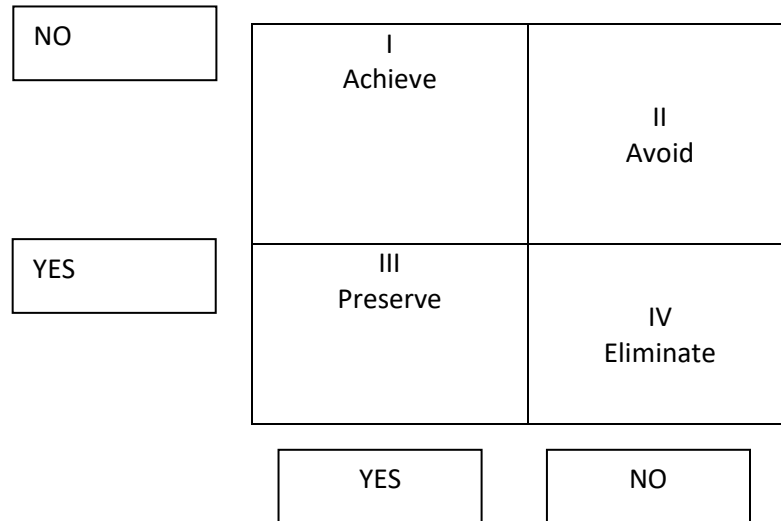
1. What are you trying to *achieve*?
2. What are you trying to *preserve*?
3. What are you trying to *avoid*?
4. What are you trying to *eliminate*?

These questions highlight the multi-dimensional nature of actions and decisions. In other words, we might seek and create many distinct kinds of effects. There is, in these four questions, a specific logical structure. The link problem solving, specifically to those two sets of conditions known as "the problem state" (*What Is* or what you have) and "the solved state" (*What Should Be* or what you want). This linkage promotes a recast of all four questions as follows:

1. What do you want that you don't have? (*Achieve*)
2. What do you want that you already have? (*Preserve*)
3. What don't you have that you don't want? (*Avoid*)
4. What do you have now that you don't want? (*Eliminate*)

### The Goals Grid

The Goals Grid shown in **Figure 1** was derived by arraying "Yes" and "No" states concerning "Have" and "Want" conditions. The structure of this framework suggests and accommodates the four questions.



**Figure 1 - The Goals Grid**

The Goals Grid shown in Figure 1 helps achieve goal clarity. It prompts me to think about the goals and objectives in an organized fashion and from four different perspectives. This structured, organized thinking helps me better understand the aims and effects of my decisions and actions.

The Goals Grid is a simple, easy-to-use tool for developing goal clarity. The Goals Grid provides a structure for examining the multi-dimensional nature of decisions and actions in an organizational setting.

The Goals Grid also provides a structure for analyzing patterns in goals and objectives and detecting potential conflict with the goals and objectives of others.

In short, the Goals Grid helps answer some fundamental questions:

1. What are we up to here?
2. Do we have all the bases covered?
3. What are we overlooking?
4. Have we thought this thing through?
5. How do our various goals and objectives relate to one another?
6. What do the patterns tell us about our willingness to risk change?
7. Are we in conflict with others?

The Goals Grid is a framework for thinking about and asking questions about your goals and objectives.

### **Approach #2**

The second approach is a more pragmatic one. In the world of grant-making, private and public monies are available. We are also seeing municipalities partnering with local not-for-profits to bring into their communities more money, goods, services, and professional volunteers (this issue will be discussed further in question #13).

I have developed six steps to match Funders with program thrusts better. The concept is to look at all funding sources for every project – sometimes combining sources (private and public) - to get the best possible result.

Before I begin to research, I summarize what you need. The Goals Grid aids me in establishing rational and logical sets of protocols for making my systems approach work. I start by filling out a search form. The search form contains:

1. A concise description of the project/program
2. Approximate cost of the project/program
3. Timeline for the project/program
4. Who is the target audience?
5. What community needs are you addressing?
6. Do you already have any funds dedicated to this project? And if so, how much and from whom?

The steps I take in Approach #2 are as follows:

#### **Step 1**

First, we identify local, regional, or national private grantmakers likely to fund your needs. These will include three major grant-making institutions: private grantmakers (foundations, corporations, corporate, associations, and religious grantmakers) and state and federal agencies.

#### **Step 2**

Once we have accumulated a comprehensive set of grantmaker profiles, we call or email each to request their latest application guidelines. If the grantmaker files an IRS Form 990 (only private foundations, associations, and corporate foundations file these documents), we also secure these documents. I request application packets and a copy of the enacted legislation for federal and state grant-making agencies.

#### **Step 3**

The background information is reviewed. We eliminate those grant programs that don't fit the proposed project.

#### **Step 4**

A revised description of the project is crafted. We then compile a list of questions to ask each Funder. We note each key contact person we should speak with at each organization and send them an email requesting a short phone call to determine whether the project for which you need funding meets the objectives of their grant-making program.



**Step 5**

Call the prospective grantmaker.

**Step 6**

Complete a final review of prospective grantmakers. Eliminate those that won't work. File them for another project, if appropriate.

These two approaches are D B Pyoas & Associates LLC's tried and accurate methods to match Funder with organization, program, and project.

8. Do all Funders require a site visit?  
No, they do not. Each Funder has its own set of criteria for assuring good stewardship.
9. At what funding level is required to have audited financials?  
Once again, each Funder has its criteria for determining to fund. However, ensuring your financial house is always wise and prudent. Ascribing to good accounting practices will always serve you well.
10. Based on your relationships, what is your projected turnaround time for receiving the first award?  
Funding cycles are specific for each Funder. "Turnaround" time can vary from three months to one year.
  - a. Based on our program, how much can we receive in grant funds vs. developing alternative fundraising campaigns? Given the information I currently have available, it would be remiss to assign a dollar value. I can assure you that D B Pyoas & Associates will provide you with quality service to help you achieve the goals set by your organization.
11. How many other clients are you currently representing?  
D B Pyoas & Associates currently represents seventeen clients within our grant writing division. Our clientele is both national and international.
12. Will you compose the grants personally vs. outsourcing them to another contractor?  
  
At D B Pyoas & Associates, we have developed, researched, and written award-winning proposals and responses to Request for Proposals (RFPs) and Notification of Funding Availability (NOFAs) since 2000. D B Pyoas & Associates is noted for our persuasive and highly competitive proposals. We have helped many organizations acquire first-time grants from donors.
13. Do you recommend collaborating with other agencies?  
  
Collaborating with "like-minded" organizations can be helpful and prudent in helping meet the needs of a non-profit. In today's climate, where resources (dollars and humans) are at a

premium, joining forces could be the way to go. Each situation is different, however, and must be approached with a clear understanding of expectations and desired outcomes.

What role will D B Pyoas & Associates play beyond the Introduction? We can and will assist you throughout the entire process, from helping you: identify your goals and objectives identifying potential collaborators, and drafting a Memorandum of Understanding.

- a. Will you draft the Memorandum of Understanding? Yes, D B Pyoas & Associates will assist in preparing MOU.

14. How frequent are your communication updates?

We are in constant contact with our clients. Each client's "comfort" level is vital in establishing a long-term relationship with those we serve. Our updates are as frequent as reasonably possible. Timetables for updates and other deliverables are spelled out in our scope of work addendum within the contract. These details are discussed and agreed upon before the commission of work.

15. Is there a specific area of discipline and type of grant in which you are most successful?

D B Pyoas & Associates has been writing award-winning grants since 2000. I have been in the grant writing business at various levels since 1982. I have different grant types: benchwork and social science research, social services, and educational and scholarship grants.

16. Can you provide samples of your most recently approved grants?

Yes, I encourage this; however, please be advised that the proposals/grants written are confidential and the property of the clients who paid for this service. Written permission must be given before sharing or disseminating these materials.

17. Would you be open to a pay-for-performance payment agreement?

I have written grants for many non-profits with many budget and financial considerations. A payment type and schedule can be worked out that is fair and equitable for all parties concerned.