CLINTON & ASSOCIATES

Before You Invest in a Grant Professional

A Roadmap for Building a Stronger, More Fundable Nonprofit

Why I'm Sharing This

One of the questions I'm asked most often is: **"Should we hire a grant writer?"** Sometimes the answer is yes, but just as often, my recommendation is to spend a few months strengthening the organization's fundraising foundation first. That's because organizations that are most successful with grants typically have something else in place first:

- A clear vision
- A realistic financial plan
- Strong community visibility
- Engaged supporters
- Basic fundraising systems
- A compelling story
- Organizational credibility

These things don't require a grant professional, but they make grant writing significantly more effective. Think of this guide as a starting point. It outlines areas your board, staff, and volunteers can begin working on today to position your organization for long-term fundraising success.

1. **Clarify Your Vision:** Don't start with: **"What can we afford?"** Start with: **"What does our community need us to become?"**

   Spend time discussing your long-term vision with your board. Think beyond next year's budget and begin identifying what your organization could accomplish over the next three to five years with the right people, programs, and resources.

   Getting Started

   ✓ Hold a board vision session.
   ✓ Identify your biggest unmet community needs.
   ✓ Begin thinking in phases rather than annual survival.

2. **Strengthen Your Financial Foundation:** Every nonprofit should understand both its current financial reality and the resources it will ultimately need to fulfill its mission. Review:
   ✓ Board-approved annual operating budget
   ✓ Program budgets
   ✓ Major revenue sources
   ✓ Major expense categories
   ✓ Financial reporting processes

As your organization grows, consider developing a longer-term growth budget that reflects the organization you hope to build over time.

3. **Build a Diversified Fundraising Strategy:** Grants are one source of funding—not the funding strategy. Healthy nonprofits typically receive support from multiple revenue streams, such as:
   ✓ Individual donors
   ✓ Foundation grants
   ✓ Corporate sponsorships
   ✓ Government funding
   ✓ Fundraising events
   ✓ Earned income
   ✓ Major gifts

   Ask yourself: **If one revenue source disappeared tomorrow, could we still operate?**

4. **Grow Your Individual Donor Community:** Individual giving represents one of the largest sources of charitable giving in the United States, making it one of the most important investments a nonprofit can make.

   Start by:
   ✓ Building your email list.
   ✓ Collecting supporter information at every event.
   ✓ Creating a simple quarterly e-newsletter.
   ✓ Sharing stories of impact.
   ✓ Thanking donors regularly.
   ✓ Making it easy for supporters to stay connected.

5. **Increase Your Visibility** People can't support an organization they've never heard of. Review your organization's:
   ✓ Website
   ✓ Social media presence
   ✓ Google Business Profile (if appropriate)
   ✓ Community partnerships
   ✓ Speaking opportunities
   ✓ Volunteer recruitment efforts

   Your goal isn't simply to be seen, it's to become known and trusted within your community.

6. **Build Trust and Credibility:** Many funders and donors research organizations before making a gift. Take time to review your public-facing information. Consider:
   ✓ Claiming your **Candid** profile and earning the highest transparency seal possible.

✓ Claiming your **Charity Navigator** profile and completing available organizational information.
✓ Publishing annual reports and impact updates.
✓ Ensuring your website reflects current leadership, programs, and contact information.

7. **Make Giving Simple:** Every additional step in the donation process reduces the likelihood someone will complete a gift. Review your donor experience. Can someone:
   ✓ Donate online in less than a minute?
   ✓ Give monthly?
   ✓ Donate using a Donor-Advised Fund (DAF)?
   ✓ Scan a QR code from a brochure or event?
   ✓ Find your Donate button immediately?

   Small improvements often lead to meaningful increases in giving.

8. **Tell Your Story Consistently:** Facts explain. Stories inspire. Begin collecting:
   ✓ Participant success stories
   ✓ Testimonials
   ✓ Photos (with appropriate permissions)
   ✓ Program outcomes
   ✓ Meaningful statistics

   These become valuable not only for grant proposals, but for newsletters, donor appeals, annual reports, social media, and community presentations.

9. **Develop an Annual Fundraising Rhythm:** Fundraising should happen year-round—not only when money is running low. Create a simple annual plan that includes:
   ✓ Quarterly email newsletters
   ✓ Donor stewardship
   ✓ GivingTuesday
   ✓ A year-end giving campaign
   ✓ Community engagement opportunities

   Consistency builds relationships, and relationships lead to sustainable fundraising.

10. **Choose the Right Grant Professional:** When the time comes, choose someone who understands fundraising—not just grant writing. Look for someone who:
    ✓ Has several years of nonprofit grant experience.
    ✓ Can provide references and writing samples.
    ✓ Has a demonstrated track record of funded proposals.
    ✓ Understands nonprofit finance and program development.
    ✓ Follows recognized ethical standards.

Be cautious of anyone who:

✗ Guarantees funding.

✗ Charges a percentage of grant awards.

✗ Promises "easy money."

✗ Encourages applying for every grant available regardless of fit.

A qualified grant professional should help you pursue the *right* opportunities—not simply the greatest number of opportunities.

You Don’t Have to Do This Alone

Successful fundraising isn't built on a single grant. It's built by strengthening your organization one step at a time. The more work you invest in these foundational areas, the stronger your organization will become, and the more competitive you'll be for grants, individual donations, corporate partnerships, and other funding opportunities.

Every organization has different needs, capacity, and available time. Some leaders enjoy building these systems themselves. Others would rather have an experienced partner help them prioritize, develop, and implement the work more efficiently. Both approaches are perfectly valid.

There's no expectation that you need to complete everything in this guide before seeking assistance. Some organizations prefer to work through these steps independently, while others find it helpful to have an experienced partner guide the process from the beginning. Either approach can be successful.

If you'd like support along the way, I offer strategic fundraising consulting tailored to where your organization is today, whether that's strengthening your fundraising foundation, developing internal systems, preparing for grants, or building a long-term fundraising strategy.

How Clinton & Associates Can Help

If you'd like support with...	***I can help you...***
Organizational Growth & Capacity Building	Develop a fundraising roadmap, identify organizational priorities, and build a practical plan for sustainable growth.
Budgeting & Financial Planning	Develop organizational budgets, program budgets, full-capacity budgets, and funding roadmaps that align with your mission and long-term goals.

Fundraising Strategy	Create a diversified fundraising strategy, annual fundraising calendar, and revenue plan that balances grants with other funding sources.
Donor Development & Communications	Strengthen individual giving through donor stewardship, newsletters, annual appeals, GivingTuesday planning, DAF giving strategies, and other donor engagement activities.
Fundraising & Grant Infrastructure	Develop the behind-the-scenes systems that make fundraising more efficient, including file structures, document libraries, reusable organizational and grant language, attachment libraries, grants calendars, tracking tools, CRM/project management systems, and internal workflows. I also provide coaching and training to help staff and board members confidently manage these systems over time.
Grant Readiness	Evaluate your organization's readiness, strengthen programs and outcomes, and prepare your organization to compete more effectively for grant funding.
Grant Research & Proposal Development	Conduct targeted prospect research, develop grant strategies, write competitive proposals, and support grant management and reporting once your organization is ready.

Whether you need assistance with a single project or a ongoing strategic support, services are tailored to your organization's goals, capacity, and stage of growth.

About Amy Clinton

Amy Clinton is the founder of Clinton & Associates, LLC, a fundraising consulting firm that helps nonprofits build sustainable fundraising systems through strategic planning, organizational capacity building, grant readiness, prospect research, and grant development.

With more than 25 years of experience in the nonprofit and public sectors, Amy has helped organizations secure millions of dollars in grant funding while strengthening the systems that support long-term organizational growth.

Amy believes in recommending what is best for each organization—not simply selling grant writing services. When appropriate, she'll encourage organizations to strengthen their fundraising foundation before investing in grants, helping ensure that time and resources are directed where they'll have the greatest long-term impact.

Her philosophy is simple:

Strong organizations attract funding. Grants don't build great nonprofits—great nonprofits attract grants.