The Needs Assessment: Making the Connection Between Data and the Nonprofit Story

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*GPCI Competency 04: Knowledge of how to craft, construct, and submit an effective grant application*

Abstract

Demonstrating a need is an essential part of creating a strong grant proposal. Typically, great care and attention are taken to develop proposal components such as the proposed activities, budget, and timeline. However, one of the grant professional’s most important responsibilities is to present a solid case for funding and to make a strong connection between available data and a nonprofit’s “story.” This article focuses on the Needs Assessment section of a proposal and presents several methods to seamlessly integrate a nonprofit’s storytelling with data to help create a compelling connection. Strategies presented include providing a descriptive solution that illustrates the impact of a program on clients and their community; presenting solid data that are specific and relevant to the cause; and telling a nonprofit’s story in a way that focuses on the clients. Such approaches will help grant professionals make a strong case with a compelling Needs Assessment and optimize a nonprofit’s chances of receiving support. The Needs Assessment is critical to the review process because it presents an opportunity to demonstrate to the funder the nonprofit’s understanding of the community issue and its ability to address the need (Gohr, Hielkema & Sanchez, 2010).

Introduction

A nonprofit’s story is only compelling when data exist to support its case. When a grant proposal is submitted for review, the reviewer seeks to find evidence to back up the reason the organization is requesting support.
Prospective grantees must present a case that tells how the organization will resolve the issue at hand.

Grant professionals must consider the key message to be conveyed to the audience and then craft the Needs Assessment section to highlight this message. The grant professional can use specific methods to enhance the nonprofit’s story and connect it to persuasive data. This article presents several ways for grant professionals to seamlessly integrate the nonprofit’s storytelling with data. Three strategies are suggested for grant professionals to develop a multi-faceted approach to the Needs Assessment section of the grant proposal: 1) provide a descriptive solution that illustrates the impact it will make to the clients and community; 2) present solid data that are specific and relevant to the cause; and 3) tell the nonprofit’s story in a way that focuses on the clients.

**Strategy 1: Provide a Descriptive Solution that Illustrates the Impact that the Nonprofit Will Make to the Clients and Community**

In *The Non-Profit Narrative*, Dan Portnoy states, “boring the audience is a terrible thing. Tell the story and tell it well. Help the audience know the struggles and triumphs in a multi-channel approach with multiple entry points” (Portnoy, 2012). Everyone loves a good story. However, unlike a great novel, grant proposals are not necessarily read in chronological order. Reviewers need to read convincing proposals that make them pause. When telling the nonprofit’s story, grant professionals must focus on the clients and the radical transformation the program will create. Funders want to charge through a proposal and find information that answers questions like: Is the program innovative? Does the program idea make sense? Will it serve the needs of the clients and future clients?

Grant professionals can describe the story in a visually compelling manner that captures the reviewer’s attention. Including infographics is a great way to get the funders’ attention. Infographics are an effective visual aid that succinctly illustrates community needs. The infographic in Figure 1 on the next page, developed by Transform Consulting Group, presents supporting data for funding to improve educational outcomes for children in an Indianapolis neighborhood:

Using an infographic is a creative way to tell a nonprofit’s story. The Pisces Foundation’s David S. Beckman (2013) endorsed the use of infographics:

Infographics can play a role in philanthropy, too. They may be better than a typical funding proposal in conveying a problem and a set of solutions—and the pathway in between....Boiling an idea down to its essence and presenting it in a compelling way is perhaps the fundament of grant prospecting. (para. 5)
Figure 1: Martindale-Brightwood Community Statistics (Copyright 2013, Transform Consulting Group. Reprinted with permission.)

One note of caution on infographics: no need to be elaborate. A reviewer will not focus on the design as much as on the information shared. Infographics can be created from free templates available online or by using Microsoft PowerPoint.
Strategy 2: Provide Solid Data that are Specific and Relevant to the Cause

Data are an important part of the grant application; they make the story understandable and the mission urgent. Data can keep the grant reviewer reading or can create disinterest. Data, just like the infographic, support the nonprofit story.

The Community Research Institute released a report entitled Nonprofits and Data—A How-To Series. The report offers insight into the importance of data. Data in the form of raw numbers, percentages, and ratios give necessary support to the information the funder requests. Specifically, data can answer critical Needs Assessment questions such as:

- Who is in need?
- Where are they?
- When is the need evident?
- What is the need?
- Why does this need occur?
- What are the consequences of meeting the need? (Community Research Institute, 2004)

When including data in the grant proposal, writers must ensure the data meet four commonly accepted guidelines: the data must be recent, relevant, regional, and reputable.

- **Use recent data.** The funders want to know the problem presented is a problem currently affecting the community. Using the most recent data informs the funder of the urgency.

- **Use relevant data.** When searching for data, it is easy to be bombarded with an influx of information from multiple resources. An easy way to determine whether the data is relevant is to consider what it addresses specifically in relation to the topic.

- **Use regional data.** Local data helps present a solid case in the proposal. The nonprofit is attempting to solve an issue that is plaguing the local area. The issue is more than likely already known to the funder. To drive the point home, use data that pertains to the relevant vicinity of the proposed project.

- **Use reputable data.** Government agencies provide community, state and national statistics that are considered reputable, whereas data retrieved from local newspapers, magazines and search engines are not considered as trustworthy.
Strategy 3: Tell the Nonprofit Story in a Way that Focuses on the Clients

Another way to connect the data and the nonprofit story is by illustrating the impact the nonprofit will make on the clients and community. In addition to the data, incorporating charts, graphs and tables creates a complete picture. Visual elements that portray client impact give the proposal reviewer a much-needed break from reading the text. When including presentation tools such as charts or graphs, make sure the comparisons and trends connect with the existing data.

The following examples from a successful grant proposal focus on the impact on clients and the community. In Table 1, statistics for School District X from the 2001-2002 school year demonstrate profound socioeconomic and educational disadvantages. This table helps the grant writer portray a sense of urgency. The information given in the table keeps the focus on the client and shows why an early intervention program is needed. For the purposes of anonymity, identifying factors have been removed.

Table 1: Client-Focused Statistics, School District X, 2001-2002

<table>
<thead>
<tr>
<th>Participating Schools</th>
<th>Total Enrolled</th>
<th>Performance Index</th>
<th>% of Black Students</th>
<th>% of Students Living in Single Parent Homes</th>
<th>% of Students Receiving Free Meals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Middle School V</td>
<td>515</td>
<td>1.8</td>
<td>98%</td>
<td>80%</td>
<td>100%</td>
</tr>
<tr>
<td>Elementary School Y</td>
<td>610</td>
<td>1.8</td>
<td>97%</td>
<td>85%</td>
<td>100%</td>
</tr>
<tr>
<td>High School Z</td>
<td>510</td>
<td>1.8</td>
<td>98%</td>
<td>87%</td>
<td>100%</td>
</tr>
</tbody>
</table>

Note: from SchoolGrants, n.d.

In the same proposal, the grant writer also interviewed students, asking them what they perceived as “risk factors” affecting their education. The resulting statistics of 555 students surveyed are as follows:

Table 2. Client-Focused Survey, High School Z, October 2001

<table>
<thead>
<tr>
<th>Risk Factor</th>
<th>% “At Risk”</th>
</tr>
</thead>
<tbody>
<tr>
<td>Academic Failure</td>
<td>89%</td>
</tr>
<tr>
<td>Teen Pregnancies</td>
<td>55%</td>
</tr>
<tr>
<td>Drug and Alcohol</td>
<td>45%</td>
</tr>
<tr>
<td>Delinquency/Truancy</td>
<td>60%</td>
</tr>
<tr>
<td>Lack of Recreational/Cultural Program</td>
<td>90%</td>
</tr>
</tbody>
</table>

Note: from SchoolGrants, n.d.
By asking the clients their opinions, the grant writer is tying the data to the nonprofit’s story because the data represents the clients’ views of factors prohibiting a quality education.

**Conclusion**

This article supports a multi-faceted approach to the Needs Assessment section of the grant proposal. To help make the connection between data and the nonprofit story, three methods are essential:

1. Provide a descriptive solution that illustrates the impact it will make to the clients and community. In the Needs Assessment section, the program idea must make sense in the minds of the reviewer and the committee. Use infographics, charts and tables to convey a message in a captivating way. When writing the Needs Assessment, focus should always be on anticipating and addressing the reviewers’ questions.

2. Provide solid data that are specific and relevant to the cause. Data must be recent, relevant, regional from local sources, and reputable. The example used is taken from the Community Research Institute. When a nonprofit uses data it must address and answer critical Needs Assessment questions such as: Who is in need? Why does this need occur? How does the need link to the organization?

3. Tell the nonprofit’s story in a way that focuses on the clients. The example of a successfully awarded proposal presented data and statistics for School District X from 2001–2002 school years. The table illustrates how prospective clients’ social-economic situation and educational disadvantages are affecting their academic life. The proposal writer used this example to convey to the reviewer that there was a critical need for the nonprofit’s mentorship program.

The Needs Assessment can be the most versatile and creative part of the grant proposal by connecting the heartfelt story with reliable data. To successfully compete in the review process, it is imperative for grant professionals to use different methods of presenting data in a convincing manner. Suggestions for further reading are Dan Portnoy’s *The Non-Profit Narrative* (2012) and Cheryl Clarke’s *Storytelling for Grantseekers* (2009). Both publications suggest ways to use nonprofit storytelling to appeal to potential donors.

**References**


**Biographical Information**

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