WIZE

WIZE 101 · WEEK 2

Grants from Start to Finish

Presented by **Louis Diez** · CEO and Co-founder, WIZE

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From funder research to final report

One sample organization, five steps, and every prompt you need to do the same in your own account.

0:00	Open and frame
0:05	The grant cycle in WIZE
0:08	Live demo, one step at a time
0:38	Your turn: start a real grant
0:48	Hot Seat and questions
0:55	What's next and close

TODAY'S SAMPLE ORGANIZATION

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Meet Brightpath Youth STEM Lab

Who they are

Free after-school robotics and STEM for middle school students in Pittsburgh.

A made-up organization, set up for this session

What WIZE already has

A case for support, a funded proposal, funder guidelines, a grants tracker, About Us and Tone & Style.

Connected tools

Email and calendar: an award letter, a program officer's questions, and the program director's fall numbers.

Due soon

A portal application on Dec 1, an interim report on Dec 15, and a full proposal on Jan 15.

Before you start: these prompts work best after the Week 1 setup, with your documents uploaded and your About Us and Tone & Style in place.

THE GRANT CYCLE IN WIZE

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Five steps, one grant from start to finish

1	**Find funders**	Funders that match your mission and region
2	**Research one funder**	Past giving, grant size and how to apply
3	**Write from your documents**	The funder's sections, your content and voice
4	**Track it**	A tracker, tasks with due dates, a weekly search
5	**Report**	Award letter and program data into the report

WHERE GRANT WORK LIVES IN WIZE

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Each part of the work has a place

- **Documents** — Proposals, funder guidelines and reports
- **A tracker spreadsheet** — One row per grant: stage, amount, deadline, next step
- **Tasks with due dates** — Every deadline on a board, assigned to a person
- **Recurring tasks** — The Monday funder search runs on a schedule
- **Drafts in your inbox** — WIZE writes the email. You review and send.

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LIVE DEMO 0:08 TO 0:14

Step 1
Find Funders

1

WIZE searches the web for funders that match your mission, region and program, and checks them against the list you already have.

STEP 1: PROMPT 1

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Find your next ten funders

> Find 10 foundations and corporate funders that support **[after-school STEM programs for middle school students]** in **[the Pittsburgh area]**. For each one, give what they fund, their typical grant size, any published deadline, and the link you got it from. Leave out funders already in our **[Grants Tracker]**.

WIZE builds the list in the background and saves it as a document in about five minutes. Keep working while it runs, and open two or three links to check them.

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LIVE DEMO 0:14 TO 0:19

Step 2
Research One Funder

2

Before you write, find out what a funder actually gives, to whom, and how much.

STEP 2: PROMPT 2

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Know the funder before you ask

> Research **[the best fit from that list]**. Using their public 990s and website, tell me what they gave to **[youth or education]** programs in the last three years, typical grant sizes, who decides, and how to apply. End with how well **[Brightpath]** fits, on a scale of 1 to 5, and why.

A private foundation files a 990-PF every year. It lists each grant it made.

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LIVE DEMO 0:19 TO 0:28

Step 3
Write From Your Own Documents

3

WIZE follows the funder's sections and word limits, and writes from your case for support, past proposals and data.

STEP 3: WHAT WIZE NEEDS

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Four inputs make a strong first draft

The funder's rules

Their guidelines or RFP: sections, word limits and what the committee looks for.

Upload the PDF or paste the text

Your content

Your case for support, a past proposal, the program budget and outcomes data.

The funder's questions

An email from the program officer in your inbox counts. Name it in the prompt.

Your voice

Your Tone & Style guide decides whether the draft sounds like you.

Say "do not invent numbers" and ask for a list of assumptions. Then check every figure.

STEP 3: PROMPT 3

Draft the full proposal

> Draft our full proposal to **[the Allegheny Riverfront Foundation Youth Opportunity Fund]**. Use their **[2027 guidelines]** for the sections and word limits, our **[Case for Support and McKinley proposal]** for content, and answer the questions **[Denise Walker]** asked in her email. Do not invent numbers. List anything you had to assume at the end.

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LIVE DEMO 0:28 TO 0:33

Step 4
Track It

4

A tracker spreadsheet holds every grant. Tasks hold every deadline. A weekly search keeps the list full.

STEP 4: PROMPT 4

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Put every grant and deadline in one place

> Add the three best-fit funders from **[your funder list]** to our **[Grants Tracker]** as Prospects, with the amount to request, deadline and next step. Then create a task for each grant deadline in the next 60 days, due two weeks before the deadline, assigned to me.

No tracker yet? Ask WIZE to create one with these columns first.

STEP 4: PROMPT 5

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Search for new funders every week

> Every Monday morning, look for new grant opportunities for **[youth STEM programs]** in **[the Pittsburgh area]**. Add any good fits to our **[Grants Tracker]** as Prospects with a one-line reason, and tell me what you added.

WIZE saves this as a recurring task it runs itself. Find it under Tasks to change or pause it.

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LIVE DEMO 0:33 TO 0:38

Step 5
Report

5

The award letter says what the funder wants. Your program data says what happened. WIZE puts the two together.

STEP 5: PROMPT 6

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Write the report and the cover email

> Write our interim report to **[the McKinley Family Foundation]**. Use the award letter in my inbox for what they asked for and **[Lena's fall numbers email]** for the data. Then draft a short email to **[Rachel Tan]** to go with it, for me to review.

The email is saved as a draft in your inbox. You review, edit and send.

WIZE

Your turn: 10 minutes

Pick one grant you are writing this season, or one funder you want to find.

1. Upload the funder's guidelines and one past proposal
2. Run the Find Funders prompt for your region
3. Research one funder from the list
4. Draft one section in the funder's format
5. Add a task for its deadline

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HOT SEAT AND QUESTIONS: 0:48 TO 0:55

Two volunteers.
Real work. Live feedback.

> Share one section of a grant you are writing, or your funder list. Louis names what is strong, what a reviewer would mark down, and runs one sharpening prompt live.

- Paste in the main chat
- Specific input gives specific output

HOT SEAT PROMPT

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Read it the way a reviewer will

> Here is a section of a grant I am working on: **[paste]**. Read it as a tough reviewer would. Tell me what is strong, what is vague, and what a reviewer would mark down. Then rewrite it so it answers the funder's question in the first sentence.

WHAT'S NEXT IN WIZE 101

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Each session stands on its own

3	**The new WIZE**	Live launch and demo, from donor data to a ranked list · Tue Nov 24, 1:00 pm ET
4	**Write Once, Steward Forever**	Appeals, emails and thank-yous in your voice · Date ✱ to be announced

Save your seat for Nov 24: luma.com/cw0dgys7

CLOSE · NEXT STEP PROMPT

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Leave this in your chat

> Based on **[our Grants Tracker, my tasks and my inbox]**, write my grants plan for the next 30 days: what is due, what to research, what to write, and what to report. Keep it to one page.

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Your next grant starts from your own work.

> You found funders, researched one, drafted a proposal from your own documents, put every deadline on a board and wrote the report from your inbox. WIZE connects your team and your tools. You decide, and you send.

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