SUPPLEMENTAL MODULE SUMMARY

TOPIC:
Grant Writing Basics

TITLE:
Grant Writing Basics

PURPOSE:
Provide a general overview about grant writing.

OVERVIEW
Finding resources for regional projects is challenging. After a region has worked through the SET process, they may need funds to help implement the regional plan. This supplemental module will help a region review the basics of grant writing.

SUMMARY OF TOPICS COVERED:
Know your objective
Where to find resources
Navigating a request for proposal/funding
Using evidence to support your proposal
Creating SMART goals
Measuring impacts
Sustainability

WHERE IT MAY FIT IN THE PROCESS:
As the region moves into implementation, this will be a logic consideration if efforts within the plan require additional resources.
GRANT WRITING:
FINALIZING THE PLAN

OVERVIEW
Purpose: During this session, participants will:
- Learn to match funding to your objective
- Learn to tell your story
- Learn to write the budget

Estimated Time to Complete: 2 hours 10 minutes

Materials Needed:
- None

Handouts:
- Sources (Handout 1)
- Plan SMART (Refer to Session 3 Handout 4)
SLIDE 1
INSTRUCTIONS

Have this slide up when participants arrive.
SLIDE 2
INSTRUCTIONS

Briefly overview the topics to be discussed in this section.

Topics of This Session
- Matching funding to your objective
- Telling your story
- Writing the budget

SLIDE 2:
TIME: 1 MINUTE
SUPPLIES: NONE
HANDOUTS: NONE
The first section is about matching funding to the project or objective you hope to reach.
Talk briefly about the concept of mission drift as it relates to finding funding. Many organizations get caught up in the dilemma of selecting a funding source that is a good fit. Selecting a funding source that will take the project off course is counter-productive in the long run.

The next few slides will go into further detail on how to avoid this problem.
In thinking about the potential sources of funding, two big categories may be considered: federal or state funding and private foundations. Briefly discuss the typical differences between the two kinds of funding as noted in the slides above.

Discussion point: How might these characteristics influence the decision about finding the right source for funding of a project?
Once a potential source of funding is identified, the team should consider these points. These details are usually provided in the first few pages of the instructions so allow for a quick check before digging more deeply into the details.

- Agency’s funding goals/priorities – does the funder’s goals and priorities fit with our project?
- Are we eligible?
  - Geographic area served
  - Type of fiscal agent needed *(nonprofit, university, gov’t agency)*
  - What target groups must be served?
- Deadlines – is this feasible for our project?
- Amount of funding available – does it fit with my potential budget? *(NOTE: all resources for a single project, especially a large one, do not have to come from a single source. However, a single source should be able to fund a specific element or niche to the entire project so that you can report successes related to their contributions.)*
- Limitations on funding – are there limitations in how funds can be used that will hinder progress? For example, if you are needing to build or upgrade a building, does the funder allow for those costs?
- Cost sharing or matching – does the funder require your team to provide evidence of sharing costs or matching funds? If so, is the team prepared to meet those requirements?
- Application procedure – is it feasible for our team?
Once the initial assessment of “fit” is complete, reading the entire application instructions is a must. Print it out and read carefully. Using a highlighter to denote important points or requirements is a good practice.

- Read VERY CAREFULLY and highlight critical information.
- Use it to answer these questions:
  - What is the allowed project timeline? *(often 1-3 yrs.)*
  - When can we expect funding?
    - Fiscal year cycles vary.
  - What are their evaluation criteria?
  - Is collaboration desired or **necessary** to apply?
    - If you are not an eligible applicant, can you collaborate with someone who is? The collaborator may have to be the applicant.
    - Almost always a benefit and may improve funding chance.
    - Very useful if collaborators offer expertise you and your group lacks.
    - **COST:** limited funds must be shared.
  - How payments will be received:
    - quarterly, monthly, single payment?
    - Cost reimbursement? Is your organization capable of managing costs between payments from the funder?
  - Reporting expectations — what is the expectation? Be forewarned — some funders have heavy requirements on reporting, both within and after the project duration.
This is a transition slide to prepare participants to consider important elements of describing their project in the proposal.
SLIDE 9

INSTRUCTIONS

Using appropriate data to tell the story accomplishes a number of objectives, as detailed on the slide.
A number of sources are available for finding reliable data. In general, seek data that matches your project’s goals. For instance, if you are working on a three county (SET Region) project, seek to use data for that same geographic footprint.
Funders like to build on previous successes, as these show promise of future success. Be able to describe what the team has already accomplished in concrete terms and how the funders’ resources can contribute to future successes.
Goal: To define the elements of a SMART goal.

SMART is an acronym that helps define a solid goal. This slide outlines the characteristics of SMART goals and provides a few guiding thoughts for each.

S means Specific: Knowing what you want to achieve and where they want to focus their efforts is important. As you develop specific goals, think through exactly what you hope to accomplish. Be clear.

M means Measurable: Develop measures that will allow you to document whether you are moving in the right direction in terms of achieving your goals. Think about the ultimate outcomes you want to achieve and the measures you want to use to document your progress along the way.

A means Attainable: Avoid embracing goals at odds with the current or anticipated resources that will be available in your region. Consider goals that align with the assets of your region. These assets are those you identified using the Community Capitals framework.

R means Relevant: Is the goal something that your SET team is truly committed to tackling? Since you may have a variety of goals that you want to pursue related to the region, taking a hard look at the importance and relevance of each specific goal is vital. Consider whether each goal will bring the greatest benefit to the region. In addition, ask yourself as a team, “Are we the right or appropriate group to address this goal or is there another entity in the region that is better equipped to tackle this goal?”

T means Time Framed: Having timelines for each of your goals is important. If you don’t have target dates or time frames, then you are likely going to muddle along, having no clear sense of what key actions need to be undertaken and by when. In order to keep things on track, build a timeline of when your team goals are to be accomplished.

Adapted from the following source:
Considering how you would measure impacts is a logical segue from using telling the story. For instance, as you describe a situation where the percent unemployment is high and you propose a workforce development strategy, a logical impact from your workforce development project would be the number of jobs created and number of unemployed that are now in full-time jobs. So, these two elements, using data to describe what IS and using data to measure what WILL Be, are closely tied.

What gets measured gets done.

- If you measure results, you can tell success from failure.
- If you see success, you can reward it.
- If you see success, you can learn from it.
- If you can recognize failure, you can correct it.
- If you can demonstrate results, you can win public support.

*Re-inventing Government Osborne and Gaebler, 1992*
These are some buzz words in current RFPs. These fit nicely within the SET framework. Be prepared to describe the work of the SET team in identifying the projects and how the team will carry forward on the projects at the close of the requested funding. If the SET team is needing additional partners to sustain the work, now is the time to be building those networks.
SLIDE 15
INSTRUCTIONS

This is an area that is often taken for granted. Yet is extremely important in any proposal. A few tips follow.
As with any part of the proposal, carefully following the guidelines is a must! Only request funds in categories that are allowed. Be able to describe how you arrived at the costs and why each item is important to the project’s success.
This slide details a few important tips:

Don’t be tight – be sure to allow for ample resources to accomplish your goals.

Research your costs – if you’re not sure how much something you need costs, do due diligence in finding a reasonable cost.

Keep an eye on any limits described in the guidelines.

If you are documenting in-kind or matching funds, be sure that the funder can clearly tell what you are providing vs. what you are requesting. Side by side columns are sometimes helpful in outlining these differences.

Budget Tips

- Don’t be tight!
- Do your research on costs.
- Pay attention to limits and allowable expenses.
- Be clear with in-kind and matching funds.
A few additional notes on matching funds. Again, examine the guidelines carefully for any descriptions of matching or in-kind requirements.
SLIDE 19
INSTRUCTIONS

• Well organized proposal sections
• Well researched and documented statement of the problem
• Creative or innovative strategies for addressing the need / problem
• Feasible goals and objectives
• Measurable objectives
• A sound evaluation plan


SLIDE 19:
TIME: 10 MINUTES
SUPPLIES: NONE
HANDOUTS: NONE