



# Stronger Economies Together

Doing Better Together

Grant Writing Basics

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# SUPPLEMENTAL MODULE SUMMARY

## **TOPIC:**

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Grant Writing Basics

## **TITLE:**

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Grant Writing Basics

## **PURPOSE:**

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Provide a general overview about grant writing.

## **OVERVIEW**

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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:**

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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:**

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As the region moves into implementation, this will be a logic consideration if efforts within the plan require additional resources.



# SET COACHES' GUIDE

Grant Writing

# 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:

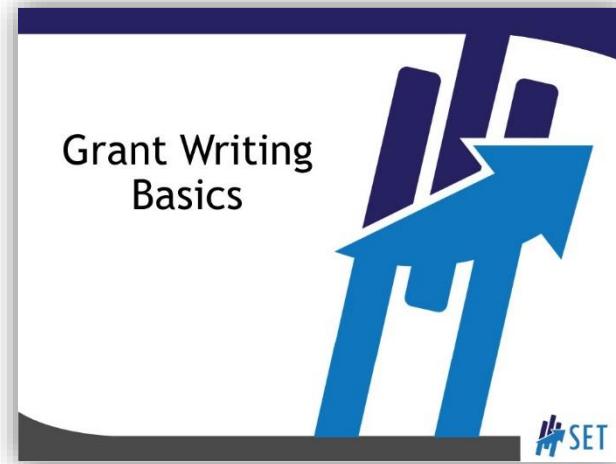
- None

Handouts:

- Sources (Handout 1)
- Plan SMART (Refer to Session 3 Handout 4)

**SLIDE 1  
INSTRUCTIONS**

Have this slide up when participants arrive.



SLIDE 1:

TIME: -

SUPPLIES: NONE

HANDOUTS: NONE

**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



**SET**

SLIDE 2:

TIME: 1 MINUTE

SUPPLIES: NONE

HANDOUTS: NONE

**SLIDE 3**  
**INSTRUCTIONS**

The first section is about matching funding to the project or objective you hope to reach.



SLIDE 3:

TIME: 1 MINUTE

SUPPLIES: NONE

HANDOUTS: NONE

## SLIDE 4

### INSTRUCTIONS

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.

### Avoiding Mission Drift

- The Funding Dilemma
  - Settle for best fit
  - Hold out for exact fit
  
- Funding should help the effort become...
  - Sustainable
  - Focused
  - Productive



**SET**

SLIDE 4:

TIME: 5 MINUTES

SUPPLIES: NONE

HANDOUTS: NONE

## SLIDE 5

### INSTRUCTIONS

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?

### Two Sources: Broad Strokes

#### Federal and State

- Awards based on strict guidelines
- Objective evaluations
- Formal reporting
- Check with your state agencies
- <http://grants.gov/>

#### Private Foundations

- Tend to be more relational
- May be more subjective in evaluations
- Reporting tends to be less formal
- <http://foundationcenter.org/>



SLIDE 5:

TIME: 15 MINUTES

SUPPLIES: NONE

HANDOUTS: SOURCES (HANDOUT 1)

## SLIDE 6

### INSTRUCTIONS

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?

### Checking the Fit: Quick Steps

- Goals and priorities
- Eligibility requirements
- Deadlines
- Amount of funding available
- Limitations on funding
- Cost sharing or matching
- Application procedure



SLIDE 6:

TIME: 10 MINUTES

SUPPLIES: NONE

HANDOUTS: NONE

## SLIDE 7

### INSTRUCTIONS

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.

### Taking Time to Examine the Details

- Read the entire guidelines – with a highlighter – and not at bedtime!
- Pay close attention to
  - Overall project timeline (start and end dates)
  - Evaluation criteria
  - Expectations on collaboration
  - How payments will be received
  - Reporting expectations
  - Any other detail that might impact your project’s successful fit with the funding.



SLIDE 7:

TIME: 10 MINUTES

SUPPLIES: NONE

HANDOUTS: NONE

**SLIDE 8**  
**INSTRUCTIONS**

This is a transition slide to prepare participants to consider important elements of describing their project in the proposal.



SLIDE 8:

TIME: 1 MINUTE

SUPPLIES: NONE

HANDOUTS: NONE

**SLIDE 9**  
**INSTRUCTIONS**

Using appropriate data to tell the story accomplishes a number of objectives, as detailed on the slide.

**Using the Data to Tell the Story****Facts:**

- Tell compelling stories
- Demonstrate knowledge of the issue
- Assist in measuring impact
- Can validate eligibility for funding

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idew.org**SLIDE 9:****TIME: 5 MINUTES****SUPPLIES: NONE****HANDOUTS: NONE**

**SLIDE 10**  
**INSTRUCTIONS**

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.

### Sources for Demographic Data

Start at home:

- Governmental agencies (town, county, state, federal)
- The closer to the project the better



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**SET**

**SLIDE 10:****TIME: 5 MINUTES****SUPPLIES: NONE****HANDOUTS: NONE**

## SLIDE 11

### INSTRUCTIONS

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.

**Describe the Past and Future**

Be able to tell:

- What you have already done
- Who participated
- Who benefited
- Why this was important
- How the funder's contribution can increase success

**SET**

SLIDE 11:

TIME: 5 MINUTES

SUPPLIES: NONE

HANDOUTS: NONE

## SLIDE 12

### INSTRUCTIONS

**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.

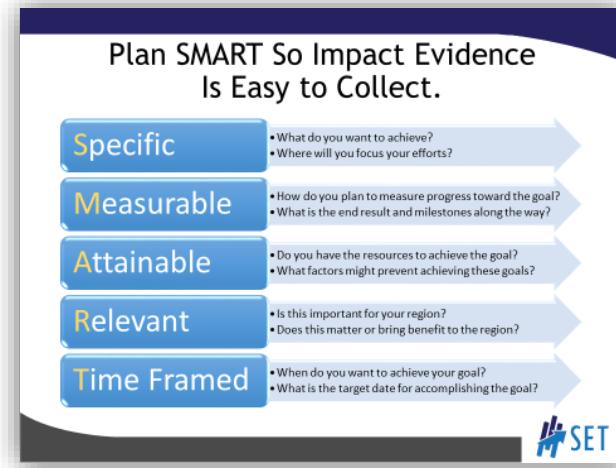
S means Specific: Knowing what you wants to achieve and where they want to focus their efforts is important. As you develop specific goals, think through exactly what you hope to accomplish. Be clear.

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.



SLIDE 12:

TIME: 10 MINUTES

SUPPLIES: NONE

HANDOUTS: PLAN SMART  
(SESSION 3 | HANDOUT 4)

*Adapted from the following source:*

Heathfield, S. M. (2011). Beyond smart goals. *About.com Human Resources*. Retrieved from <http://humanresources.about.com/cs/performancemanage/a/goalsetting.htm>

## SLIDE 13

### INSTRUCTIONS

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*

### Measure Impact: Motivation

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


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SLIDE 13:

TIME: 10 MINUTES

SUPPLIES: NONE

HANDOUTS: NONE

## SLIDE 14

### INSTRUCTIONS

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 14:

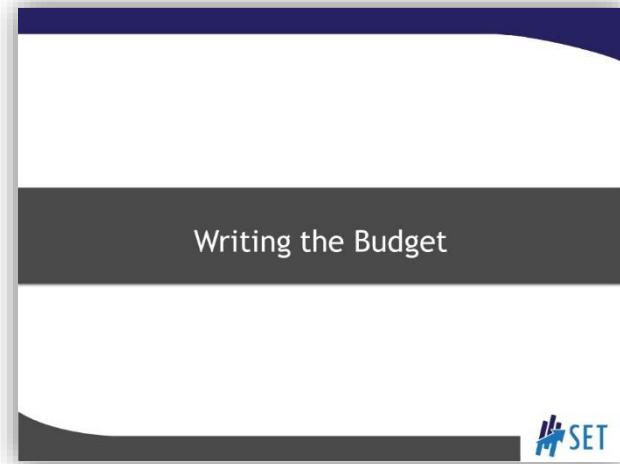
TIME: 5 MINUTES

SUPPLIES: NONE

HANDOUTS: NONE

**SLIDE 15**  
**INSTRUCTIONS**

This is an area that is often taken for granted. Yet is extremely important in any proposal. A few tips follow.



SLIDE 15:

TIME: 1 MINUTE

SUPPLIES: NONE

HANDOUTS: NONE

## SLIDE 16

### INSTRUCTIONS

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.

## Budget

- Use the budget to show how the grant fits into a larger plan.
- Most grant forms offer very few categories for expenses.

- Examples:
  - ✓ Personnel / Fringe
  - ✓ Travel
  - ✓ Equipment
  - ✓ Supplies
  - ✓ Operational




SLIDE 16:

TIME: 5 MINUTES

SUPPLIES: NONE

HANDOUTS: NONE

## SLIDE 17

### INSTRUCTIONS

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.



SLIDE 17:

TIME: 5 MINUTES

SUPPLIES: NONE

HANDOUTS: NONE

**SLIDE 18**  
**INSTRUCTIONS**

A few additional notes on matching funds. Again, examine the guidelines carefully for any descriptions of matching or in-kind requirements.

### Matching Funds

- Funders may sometimes allow in-kind matches but at other times cash.
- Use fund raising to find matching funds.
- Be creative with fund raising activities.
- Donations can be a source for matching funds.



SLIDE 18:

TIME: 5 MINUTES

SUPPLIES: NONE

HANDOUTS: NONE

## 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

<http://ctb.ku.edu/en/table-of-contents/finances/grants-and-financial-resources/writing-a-grant/main>

### Features of a Strong Proposal

- Well organized **proposal sections**
- Well researched and documented **statement** of the problem
- Innovative **strategies** for addressing the need / problem
- Feasible **goals**
- **Measurable** objectives
- A sound evaluation **plan**



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SLIDE 19:

TIME: 10 MINUTES

SUPPLIES: NONE

HANDOUTS: NONE