

# Grant Process Steps



## Preparation

In the whole process of applying for a grant, your initial steps will probably be the most time-consuming, but also the most important, part. If done well, your preparatory work will simplify the writing stage.

### 1. Define your project

- Clarify the purpose of your project and write a concise mission statement.
- Define the scope of work to focus your funding search.
- Determine the broad project goals, then identify the specific objectives that define how you will focus the work to accomplish those goals.

*Example:*

*Goal: To improve production quality.*

*Objective 1: Recruit advanced production talent.*

*Objective 2: Train mid-level producers.*

*Objective 3: Upgrade production equipment.*

These goals and objectives suggest the proposal will request support for recruitment activity, production training, and equipment purchase. In contrast, a different proposal with the same goal might focus only on equipment upgrades.

- Decide who will benefit. Benefits may extend beyond the direct beneficiary to include the audience, other institutions, etc.
- Draft expected project outcomes in specific measurable terms.
- Draft a timeline that includes the planning phase, the period of searching for funds, proposal writing, and the intended project start date. Periodically update the timeline as you learn more about submission deadlines, award timetables, etc.

### 2. Identify the right funding sources

- Foundation centers, computerized databases, station development offices, publications, and public libraries are some of the resources available to assist your funding search.
- Do not limit your funding search to one source.
- Look for a match between your project and the grants you seek by looking for consistency between the purpose and goals of your project and the funder. In addition, pinpoint specific funding priorities and preferences.
- Make direct contact with funders to support projects like yours.
- Request proposal guidelines. Also request a list of projects previously funded through this specific grant program; an annual report may be available.
- Inquire about the maximum amount of the grant. Also, find out the average size and funding range of awards.

- Determine if funding levels of the grants you select are appropriate for your project. Note whether there is a funding floor or ceiling.
- Find out whether the funder has other grant sources for which your project is eligible.

### 3. Contact the funders

- Think of the funder as a resource.
- Identify a project officer who will address your questions.
- Some funders offer technical assistance, others do not. If it's available, ask for technical assistance, including a review of proposal drafts.
- Inquire about how proposals are reviewed and how decisions are made.
- Inquire about budgetary requirements and preferences. Are matching funds required? Is in-kind support acceptable as a portion of applicants' share? What may be counted as in-kind support, and how might it be applied? Learn about payment processes, including cash flow.
- Remember, the contacts you make may prove invaluable in the future.

### 4. Acquire proposal guidelines

Read the guidelines carefully, and then read them again. Be sure to ask the funder any questions you may have.

Guidelines usually tell you about:

- submission deadlines
- eligibility
- proposal format: award levels forms, margins, spacing, evaluation process and restrictions on the number criteria of pages, etc.
- review timetable
- budgets
- funding goals and priorities
- award levels
- evaluation process and criteria
- whom to contact
- other submission requirements

### 5. Know the submission deadline

- Plan to submit your proposal on or preferably before the deadline.
- Determine what format the funder requires for submission.
- Be realistic about whether you have time to prepare a competitive proposal that meets the deadline.
- Know the funder's policies on late submissions, exceptions, and mail delays.
- Find out how the funder will notify you about the receipt and status of your proposal. Factor this information into your timeline.

## 6. Determine personnel needs

Identify required personnel both by function and, if possible, by name. Contact project consultants, trainers, and other auxiliary personnel to seek availability; acquire permission to include them in the project; and negotiate compensation. Personnel compensation is important budget information.

## 7. Update your timeline

This is a good point at which to update your timeline, now that you know about submission deadlines and review timetables.

Factor into your schedule time to:

- Write multiple drafts
- Solicit the project officer for review of your draft
- Gather relevant and permissible materials, and
- Prepare an impartial critique of your proposal for clarity, substance, and form.

# Writing the Proposal

Structure, attention to detail, concise persuasive writing, and a reasonable budget are the critical elements of the writing stage. There are many ways to organize proposals. Read the guidelines for specifications about required information and how it should be arranged. Standard proposal components are: the narrative, budget, appendix of support material, and authorized signature. Sometimes proposal applications require abstracts or summaries, an explanation of budget items, and certifications.

## 1. Narratives

### Statement of need

Purpose, goals, measurable objectives, and a compelling, logical reason why the proposal should be supported. Background provides perspective and is often a welcome component.

### Approach

Method and process of accomplishing goals and objectives, description of intended scope of work with expected outcomes, outline of activities, description of personnel functions with names of key staff and consultants, if possible.

### Method of evaluation

Some require very technical measurements of results. Inquire about expectations.

### Project timeline

Paints a picture of project flow that includes start and end dates, schedule of activities, and

projected outcomes. Should be detailed enough to include staff selection and start dates.

### **Credentials**

Information about the applicant that certifies ability to successfully undertake the proposed effort. Typically includes institutional or individual track record and resumes.

### **Tips on Writing the Narrative**

Narratives typically must satisfy the following questions:

- What do we want?
- What concern will be addressed and why it is important?
- Who will benefit and how?
- What specific objectives can be accomplished and how?
- How will results be measured?
- How does this funding request relate to the funder's purpose, objectives, and priorities?
- Who are we (organization, independent producer) and how do we qualify to meet this need?

### **The HOOK**

There are many ways to represent the same idea. However, the HOOK tailors the description of the idea to the interest of a particular funder. The HOOK aligns the project with the purpose, and goals of the funding source. This is a critical aspect of any proposal's narrative because it determines how compelling reviewers will perceive your submission to be.

## **2. Budget**

Budgets are cost projections. They are also a window into how projects will be implemented and managed. Well-planned budgets reflect carefully thought-out projects. Be sure to only include those things the funder is willing to support.

Funders use these factors to assess budgets:

- Can the job be accomplished with this budget?
- Are costs reasonable for the market - or too high or low?
- Is the budget consistent with proposed activities?
- Is there sufficient budget detail and explanation?

Many funders provide mandatory budget forms that must be submitted with the proposal. Don't forget to list in-kind support and matching revenue, where appropriate. Be flexible about your budget in case the funder chooses to negotiate costs.

## **3. Supporting materials**

- Supporting materials are often arranged in an appendix. These materials may endorse the project and the applicant, provide certifications, add information about project

personnel and consultants, exhibit tables and charts, etc.

- For projects that include collaborations or partnerships, include endorsements from the partnering agencies.
- Policies about the inclusion of supporting materials differ widely among funders. Whether to allow them usually depends upon how materials contribute to a proposal's evaluation.
- Restrictions are often based on excess volume, the element of bias, and relevance.
- Find out if supporting materials are desired or even allowed. Be prepared to invest the time to collect resources, produce a tape, document capability, update a resume, collect letters, include reference reports or whatever is needed.

#### 4. Authorized Signatures

Authorized signatures are required. Without these, proposals may be rejected. Be sure to allow yourself time to acquire a needed signature.

#### 5. Specifications

Tailor proposal writing to specifications found in the guidelines. Include only the number of pages allowed. Observe the format. Is there a form to complete? Must the proposal be typed, double spaced, on 8-1/2 x 11 inch pages? Are cover pages allowed or desired?



The beautifully bound proposal is not always appreciated or allowed.

Be concise. Elaborations should add depth and scope, not page fillers. Be prepared to write more than one draft.

#### 6. Submission checklist

- The complete proposal must be submitted on time in the requested format with the requested number of copies and original authorized signatures.
- Address the proposal as directed in the guidelines.
- Be sure to include required documentation.

## Follow-up

Contact the funding source about the status, evaluation, and outcome of your proposal. It is important to request feedback about a proposal's strengths and weaknesses, although this information may be unavailable with a very large volume of submissions.

Reference information may also be useful if you choose to approach the same or different funder again with your idea.

Source: Grant Proposal Writing Tips <http://www.cpb.org/grants/grantwriting.html>