

Grant Writing 101

Presented by:

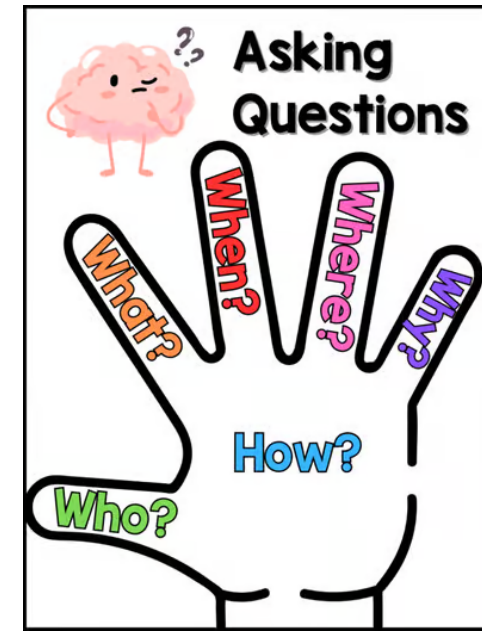
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Agenda

- Data Collection -“why”, “where”, “who”(beneficiaries)
- Securing Partners -“who” (stakeholders)
- Funding Opportunities -“who”, and “when”,
- Work Plan Development - “what”, “when”, and “who”
- Budget Creation - “how” much
- Application Narrative Development -“why”, and “how”
- Supporting Documentation-“who”, “how”
- Final Review
- Post Award



Data Collection

Demonstrating the Need

Is there a problem? How do you know?

- Plans
- Strategies
- Consent Orders
- Public feedback, like survey data and ‘heated meetings’
- Census Data
- Current Challenges/ Reoccurring Negative Experiences
- Did you collect your own data?
- Have others collected data for you? (paid or unpaid)

Have you perceived the actual problem?

- Needs assessment to evaluate what the problems are and where the root causes are ?
- Consider other afflicted geographic regions
- Consider underlying conditions.
- Is anyone else addressing this same problem?

Do you have any idea how to fix it?

- Check out those plans & strategies... do they provide recommendations?
- What have peers done to resolve this problem?
- Are there recommendations from the State, the county or the Federal government?
- What do your residents think?
- Responding to a grant announcement (with specific fundable actions listed).
- Consultants can provide specific guidance.

The data identifying the problem will also demonstrate the effectiveness of your solution.

- Will the plans and strategies incorporate your project into the next round of implementation?
- Have Consent Orders ended?
- Have you received good public feedback?
- 1-5 years after the implementation, Census Data may show improvements.
- Improvements of recurring challenges?
- What had your own data collection shown?
- Have others data sets shown improvement? (paid or unpaid)

Grant writing is like “teaching to the test”

- You design your program to achieve the best provable results.
 - Use data that shows your case,
 - Use data points that are influenceable- through your program
 - Track the results over time
- Success!



Securing Partners

Building Alliances

* Explore your ecosystem... Learn from others

Who is also trying to address the challenge or opportunity?

Can you collaborate with these partners to find solutions and combine/leverage resources?

What are your Potential Partners' Characteristics?

Programs – Purpose - Limitations – Challenges

Strengths – Other Alliances – Capacity/Experience

Secured Resources – Needed Resources

What will their role be in the project?

Engage Partners early in the Project Development /Planning Phase



Potential Partners - Municipalities

Partners, not those that support the efforts, but those that will be actively engaged in the implementation and decision making - are a critical component for securing resources and overcoming barriers.

Villages ↔ Towns ↔ County
(leadership/dept.)

County IDAs

Tourism

Chambers of Commerce

County/City Planners

For-Profits/Private Investors

EDD/REDC

Large Nonprofits
(Hospitals, Schools/Colleges, CAA, etc.)

Regional Planning & Dev. Board



Potential Partners - Nonprofits/Public

Partners are critical for securing match/resources, sustaining projects beyond grants, and overcoming barriers.

HOUSING

County:

Leadership

Depts. - Planning, Social Services

Designated Section 8

EDD - LDD - REDC

Land Banks

Developers

NFP – Support Services: Transit, Pantries, Community Centers, etc.

NFP – Focus: Arbor, Habitat, IDA

WORKFORCE

Local Dept of Labor/WIB

Educational Entities

EDD-LDD-REDC

For-profit Businesses

NFP – Support Services: i.e.

Transit, Legal

NFP – Focus: Chambers, IDA,

Incubators

Parks/Recreation

County i.e. Youth Bureau,

Planning

Municipality(s)

Tourism

NFP i.e. sports leagues, clubs, schools

For-profit Businesses

IDA

SUD - Recovery

County Depts.

i.e. Social Services, Probation

SUD Entities “sustaining recovery”;

i.e. Counseling, AA, Peers

EDD - LDD - REDC

NFP – Support Services:

Transit, Legal/Courts, Housing,

Pantries, Education

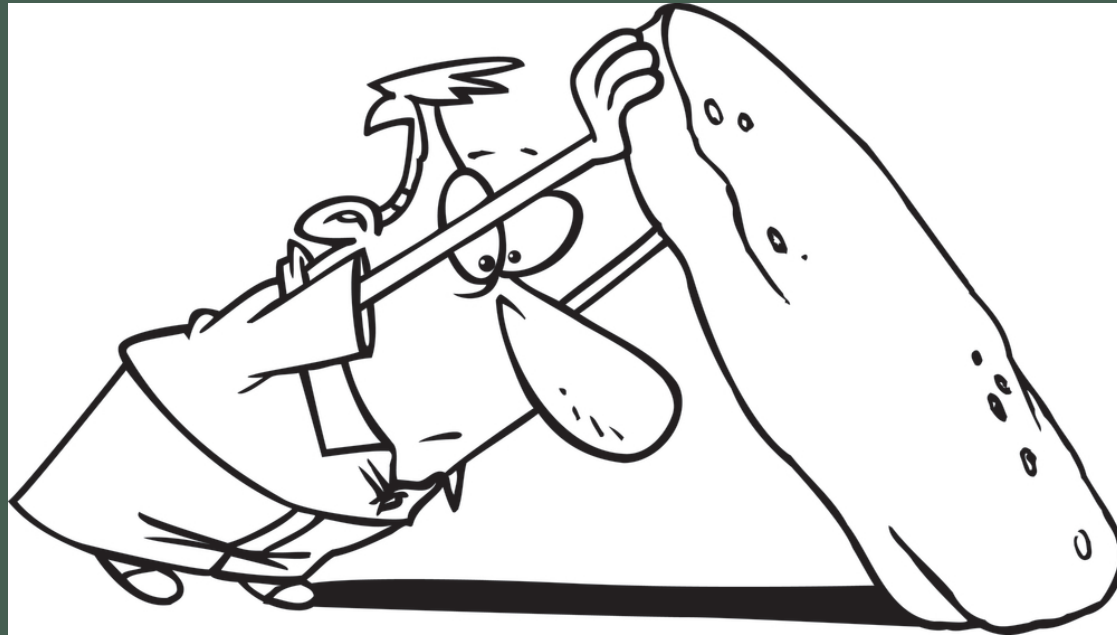
Workforce Boards

Education

Employers



Where to look for funding?



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Finding & Accessing Grant Resources

- NYS CFA
https://regionalcouncils.ny.gov/sites/default/files/2026-06/CFA_Available_Resources_2026.pdf
- Local news /historical press releases/LinkedIn
- Regional Planning Boards
- Local Foundations
- Grants.gov
- “Candid.” a foundation resource guide <https://candid.org/>



Let's get started!

- Review the grant announcement
- Internal timelines
- Internal grant writing teams
- External timelines with partners
- External grant writing teams with partners
- Q&A with funders
- Submission



Review Grant Announcement (NOFO)

- Ensure your project is aligned with the following most important elements from the grant announcement:
 - Eligible Applicants
 - Submission deadline
 - Eligible expenditures
 - Total award amounts
 - Minimum required match amounts
 - Scoring criteria (and priorities of the funder)
 - Required attachments, letters, documentation,
 - Narrative
 - Budget completeness/accuracy



Grant Announcement Breakdown

- NOFO *recommendations* - read, reread, and read one more time.
 - First Read: Read through to understand important elements
 - Second Read: Identify key information
(font size, page limits, registration, submission requirements, etc.)
 - Third Read: Identify priorities and phrases to incorporate/aligning your proposal with the opportunities purpose.



Is the Grant Opportunity a Good Fit?

- Does the grant opportunity align with problems and proposed solutions?
- Does the grant opportunity make sense/cents: \$\$ worth the effort? (audits, reporting, timeliness, etc.)
- Can you match this funding opportunity with other Federal and/or State sources?
- Are there any budgetary restrictions? (project admin, indirect, etc.)

Internal Timelines & Grant Writing Teams

- Once you determine the funding opportunity is a good fit, using the information gathered in the readings, develop a timeline for each component of the proposal.
- If possible, assign tasks to different partners, but make sure to have one individual assigned to the final narrative review and assembly. This will give the proposal “one voice” and cohesiveness.
- Be clear with expectations/deadlines with both staff and partners.

External Timelines & External Grant Writing Teams

- Matching grants that have different due dates. Don't start work before grants are awarded.
- Engage partners early in the project development, especially when designing the workplan timeline.
- Motivate your partners through the internal timelines – everyone needs to be prepared to submit the grant 7 days early. Don't let one slow partner derail an entire application.
- Think hard- if a partner can't deliver on letters, budgets , and narratives? Are they really a good fit to help you implement the program? Be willing to 'move in a different direction'.

How can you tell if a consultant is qualified?

- Evaluate consultant's work against other bidders, and other good projects in your community... if the 'good' consultant team didn't bid your projects, consider why?
- It is common to be slightly disappointed with your consultant; it's a learning experience. You can both do better next time.
 - Make sure you are confident the consultant can accomplish on the key deliverables in a way and timeframe that will satisfy you.
- Review the consultant's work/application to ensure your team and partners understand and agree with what has been developed, especially workplan, timelines, budgets and deliverables.



Questions/ Webinars/ Submitting

- Don't wait until the due date to submit!
 - Best practice is to submit one week before the deadline, 5 days early would still be terrific.
- Funder webinar(s): make sure someone on the team attends.
- Review Frequently Asked Questions, if provided.
- Review the submission process early
 - Portal registrations
 - Understand uploading process

Lets' Review

- Review the grant announcement
- Internal timelines
- Internal grant writing teams
- External timelines with partners
- External grant writing teams with partners
- Q&A with funders
- Submission

GO/NO GO criteria

- Does it align with your solutions? If no, then stop work.
- How long does it take your organizations to develop budgets, assessments, department head meetings? Letters of commitment? Final signature? Resolutions to authorize submission? If you can't do it by the deadline, then stop.
- Do you have the staff capability needed to complete the grant application work? Do those staff have time to do that grant application work?
- Your partners may have all the same time limitations around board meetings, staff meetings, prior commitments to other big projects, purchasing requirements, changes to the adopted budgets. Can your partners provide all the necessary information in time for the grant to be reviewed and submitted?
- Is it necessary to hire a consultant for this work? Can you get a qualified consultant in time?
- Check out the Q&A or attend webinars to find out if there are any exclusion criteria that apply to your planned project.
- Have your priorities changed during the 6 months you were working on this grant application? Did a local election occur and there's no longer support for the effort? Have state and federal elections resulted in an unfavorable funding environment?



Workplan Development

Creating a roadmap for your project

* Writing the Proposal: Workplan General Considerations

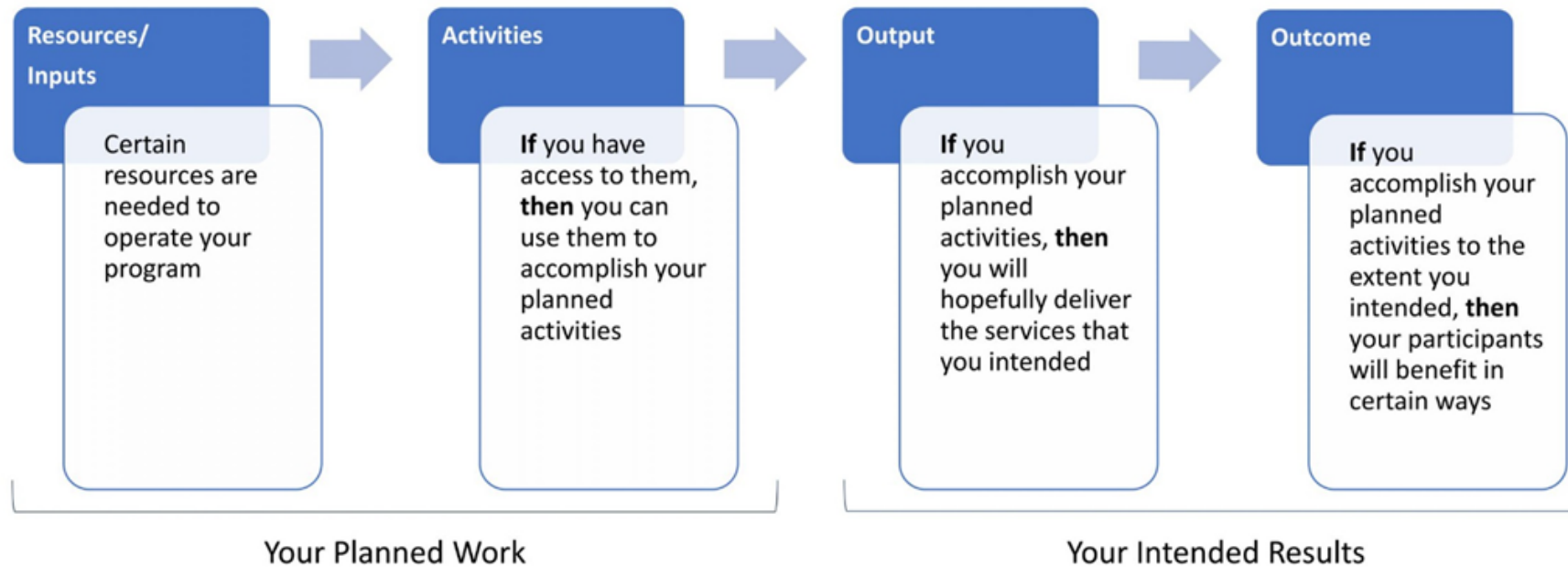
- You should have face to face meetings in the beginning to solidify the initial workplan. Changes may come over time but give yourself a solid base for the subsequent phases of the grant writing process.
- *Don't plan to start any work before the all the grant funding is officially awarded.*
- Planning starts with the end in mind. Plan backwards - implement forward.
- Logic Models are an effective tool for creating a visual roadmap of the project and ensuring activities link to intended outcomes and impacts.

* Logic Model

Start Planning Here

Plan Backward

Thinking of Logic Models as a Series of *If . . . Then* Statements



Implement Forward

*Writing the Proposal: Workplan Details and Specifics

Workplan/Timeline should clearly indicate:

- “**what**” activities will be performed
- “**when**” those activities will be accomplished
- “**who**” will be engaged/served and “**who**” will be responsible for conducting each of the activities

Additional Considerations:

- Partnerships: support to and from partners (when resources acquired and utilized)
- Required events, planned events, community events (tie in to project activities)
- Ecosystem (engaging beyond partners & participants)
- Capacity building...
- Shared or competing timelines
- Performance Measures / Outcomes
 - # of participants served, # of times activities must be conducted,
 - expected points in time when # of outcomes will be realized

*Sample Workplan

In this Workplan we can identify:

- **what** the project activities are
- **when** the activities should be implemented
- **who** is responsible for each activity
- **how** much money.

From the information in the workplan, a budget can be developed.

Table 3.2(b): Project Workplan & Timeline

Activities/Tasks Corresponding to Project Workplan	Start-up	1st Quarter	2nd Quarter	3rd Quarter	4th Quarter	Responsible Party
Project Advisory Committee (PAC) formed and initial kick-off meeting is set to define the scope and scale of the three projects			Mar 2023			Committee Chairs and PAC Committee
Procurement of Consultant or Project Manager to report to PAC and lead us through the Project			May 2023			Project Advisory Committee
RFP written and Project Manager to promote to various sites for formal RFP submission process			July 2023			Project Manager with input from PAC
Subcontract and Compliance with Local Procurement Requirements				Sep 2023		Project Manager and PAC
Project Advisory Committee Meetings, Site Reconnaissance and Initial Schematic Design Completion		Jan 2024				Project Manager and PAC
Public Meeting held based on schematic design and public input gathered for design revisions		Mar 2024				PAC
Permit Analysis, Department of Health, and Pre-permitting Meeting			Apr 2024			Dept of Health, PAC
Design Development – Construction and Shovel Ready Design Work – Drawing from 50% to 75% to 90% to Final				Sep 2024		PAC
Purchase of Equipment and all Large orders placed for implementation					Nov 2024	Project Manager, Resident Artist (Sculpture Walk)
Project Completion and Reporting	Jan 2025					Village Treasurer, PAC, Project Manager
Public Opening Ceremony and Thank You		Apr 2025				Project Manager and PAC



Budget Creation

* Writing the Proposal: Budget - General Considerations

Applications often include several areas where budgets are addressed; usually an official form with major incomes and lumped expenditures, budget narratives, and possibly sections of the budgets in designated areas.

- Recommendation: After creating workplan/timeline, develop the master budget - this should be the most comprehensive budget required in the application. Once all are partners concur, build all other budget sections from this one budget.
- Make sure all proposal financials balance and mirror each other as well as align with the workplan and proposal narrative. Letters of Commitment must also align with previously stated budget amounts.
- Expense timelines and reimbursement timelines - timeliness and monitoring are critical for ensuring you can turn the funds around in an expedited fashion, keep this in mind when creating the workplan.

*Writing the Proposal: Budget Details and Specifics

Make sure you and your partners understand, what is:

- Feasible: What can we realistically accomplish with the funding opportunity and match, within a reasonable timeline?
- Allowable: What are we permitted to spend the funds on?
 - I.e. promotion is a typical allowable expenditure for most sources, but depending on the funding source there may be specific guidelines.
- Budget categories: NOFO will often provide a budget form or sample budget, try to use categories provided.
- Limit creating new budget categories and limit sub-categories; online reporting often doesn't take this into account.
 - Supplies - promotion; Supplies - trainings and training materials
 - Supplies - training materials, promotion, outreach, meeting materials (including refreshments), and participant support (incentives, transportation, recognitions, etc.)
- Defining budget expenditure - when permitted, provide enough information for understanding, but not so much it locks you in.
 - Travel - staff members to travel to project sites and meetings. (Good)
 - Travel - staff members to travel for project supported activities: site visits, meetings, trainings, outreach, etc. (**Better**)

Planning for use of matching resources or Your staff can't eat 'match'

Documenting matching funds or in-kind resources in your project is helpful. But the match included in the project must also ensure that cashflow is feasible.

- Does your project have a source of upfront cash?
- USDA / Community loans to start up the project?
- Can reimbursements be cycled through the grant for cashflow?
- How does in-kind match support the effort?
 - If your in-kind exceeds the matching rate- or can't be fully reimbursed in your program... then share this in-kind with another organization, let them join the partnership and perhaps their funders can re-imburse the additional in-kind.

Match funding is treated the same as grant funding.

- Match funding **cannot** be spent prior to the grant being awarded. Any match funding spent prior to the grant award will not be considered.
- Match also must be documented and accounted for and follow the same criteria as grant funding (i.e. procurement, BABA, etc.)

* Planning for execution in the budget development phase

Should you budget for grant administration in your proposal?

- Writing the grant and administering the grant award may be equally challenging processes- but they are different.
- Grant writing is a short-term challenge, heavy on forethought: networking, and planning.
- Grant administration is a long-term ongoing process, where documentation is necessary to access reimbursement funds, keep the project on task, and documentation is necessary to save your organization from audit findings.
 - Be aware that grant/project requirements can change a bit or be more heavily enforced after the award (i.e. BABA Compliancy, new funder administration guidelines). Grant administrators can help navigate these changes.
- Will the funding opportunity allow you to build into the budget grant administration costs? I.e., 14% for NY Main Street grants, 25% for PHMSA, 10% for CDBG, 50% of actual administration costs for ARC.

* Planning for execution of funding reimbursements?

Your budget is ready- you have an approximate timeline to spend down the funds for successful completion of the effort.

- Are you ready to fund 100% of the effort upfront and then wait up to 12 months for funding to reimburse your expenses?
- Do you understand the funder's policy for reimbursement
 - CDBG pays out directly based on unpaid invoices (checks must go out to every vendor within 5 days of receiving NYS payment)
 - ESD / Fast NY are paid out 6months+ after the project is fully completed and closed. Applicants have incurred all the project costs upfront/have debt.
 - ARC only reimburses for 50% of the allowed project costs. ARC must be last into the project, and ARC reimbursements come approximately 120 days (one reporting cycle) after expenses are paid.

Building the Narrative

Actually writing the grant: Get ready to put ‘ink on the page’

- Download whatever material you can find....
(including successful grant applications)
- Prepare the grant application framework based on the application requirements. Put it all together into a checklist (with dates and assignments) and a corresponding file folder.
- Start at least one word document with your narrative answers.
- Share editable links the application framework with your project partners.
- Start working together to complete the required sections.
- Don't be upset if partners are confused or suggest alternatives; these could be very important comments. Use your internal explanations and rationales to strengthen your narrative.

Actually writing the grant: Who, Who, Who?

- Who is the reader?
 - Tune your writing style to the grant reviewer (your reader)
 - Aim for professional writing- appropriate to the field/program you are trying to access.
 - Don't use forced language.
- Who will this program serve? Always keep the rationale or outcomes as the focus of the narrative.
 - For ARC grants you imply ... “to better serve the people of Appalachia.
- Who on your team is good at writing?
 - are they able to work closely with finance and program staff?
- Clear and understandable language should be your #1 goal.

Actually writing the grant: Make your case with the Narrative

- State explicitly or imply strongly that each aspect of your program will meet the funder's program goals; **like the verse and chorus in a song.**
- Who- What- When- Where- Why- How (all over again). You can use this 'thesis statement' approach for every question
 - “During the 18-month grant period (____ to _____) the office accountant, will document and balance project expenses, quarterly in accordance with our standard accounting and purchasing polices, to maintain compliance with CFR 200.”
-When, Where, Who, What, How, Why-
 - “Outreach Staff will interact with clients and family members, daily throughout the 6-week program. Visits will be guided by the program curriculum/professional standards of our regulator (_____). These visits will occur in the client's homes or the retrofitted program space on Main Street. Each of these visits will support the client-provider relationship to improve outcomes or directly achieve the educational outcomes of the curriculum.”
Who/Who/Who, When, What, How, Where, Why-

Actually writing the grant: Narrative Details and Specifics:

- The narrative will walk a line between broad ideas and highly specific references; and that's OK.
- The overall narrative, the narrative flow, the supporting documentation must all show alignment with the funder's strategies and your own strategies (frame up the big picture for the reader).
- Within the different sections of the narrative, the budget, and the workplan you will need to delve into the most important specifics of the program. These program specifics should show forethought and a commitment to action.
- The specifics you include in the grant application should be TRUE; if you are caught in a lie or a falsehood the rest of your application could be questioned.... Be cautious with your use of AI.

Actually writing the grant: Narrative Details and Specifics:

- All those outcomes, outputs, partner commitments, and logic models should ‘make an appearance’ throughout the application. These are the details the reviewers want to see.
- Feel free to reference specific pages of other documents and add that brief material as part of your attachments.
- Cost estimates and references to other successful projects should be included where appropriate; these details enhance the fundability of your application by demonstrating your forethought.
- Feel free to mention your agency’s specific advantages in providing the service or leading a project; this is the moment to ‘close the deal’, give it your best.

Support Documentation

Actually writing the grant: Letters of Commitment

- Unique letters only- Signed and Dated
- Commitment letters must explain the partner's role in the project, provide specific dollar amounts for the commitment, (and the calculation method used for in-kind match) and demonstrate they are a key partner and have the expertise necessary to complete their assigned tasks.
 - These letters should reference the partner's specific strategies/ plans/ goals that the grant will support.

Actually writing the grant: Letters of support

- Unique letters only-
- Committee members and volunteers can write unique letters for each partner organization
 - These letters should reference the partner's specific strategies/ plans/ goals that the grant will support.

Proposal Review

Proposal Review: draft review and revise x2

- Use all the spell-check available in your software.
- Pretend you don't know anything and review the narrative with a 'judgmental eye.'
- Share the draft with trusted advisors.
- Attempt to use the online grant submission portal at least 2 weeks before the deadline
- Double check to verify all financials align and are balanced.
- Imagine you are funded. One year from now, what steps do you take? Has any part of grant administration been overlooked in your narrative?
- Follow all these steps even if you've hired a consultant. They make mistakes too.

Submitting the Final Grant

Be sure to comply with the guidance in the grant announcement

Now you wait....

Congratulations!

Now what?



*Post award

- Grant management processes and funding.
- Filling fees (not chargeable to the grant)
- Managing agreements & payments to contractors and/or sub-agreements (partners)
- Understand reporting
 - Process:
 - financial and/or progress reports
 - Designated forms or informal email updates
 - Online portal versus email
 - Chain of command for reporting
 - What supporting documentation is required?
 - Frequency
 - Monthly? Quarterly? 120 days? Other?
 - Financial reports submitted each time reporting or when needed

Your project after the grant is completed

- Document the challenges faced during the process. This may be helpful for future grant applications
- Report your successes to your board, your clients, the public, and the media. Don't let this success be forgotten.
- Consider additional grants to expand the effort.
- Train other organizations to implement this program (income?).
- Integrate other organizations into your programs (strong networks).

Questions?

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