

E CIVIS PRESENTS  
FUNDAMENTALS OF GRANTS



SAN ANTONIO, TX  
MARCH 2007



**CHANGING THE WAY YOU VIEW GRANTS**

tools and training for locating, applying, and managing funding

# FUNDAMENTALS OF GRANTS

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## *Grants Professional Training*

- I. Table of Contents**
- II. Presentation Slides**
  - A. *Introduction***
  - B. *Project Planning***
  - C. *Grant Research and Grants Locator***
  - D. *Strategic Grant Selection***
  - E. *Planning the Match***
  - F. *Preparing for Grant Writing***
  - G. *Concluding Remarks***
- III. Exercises**
  - A. *eCivis Find More Grants Tool™***
  - B. *Scenario 1***
    - 1. *eCivis Grant Selection Tool™***
    - 2. *National Brownfields Program***
  - C. *Scenario 2***
    - 1. *eCivis Grant Selection Tool™***
    - 2. *Texas Yes! Rural Beautification Program***
  - D. *Scenario 3***
    - 1. *eCivis Grant Selection Tool™***
    - 2. *Library Bond Act, Library Construction Grants***
  - E. *10 Questions for the Program Officer***
  - F. *Exploring Matching Funds***

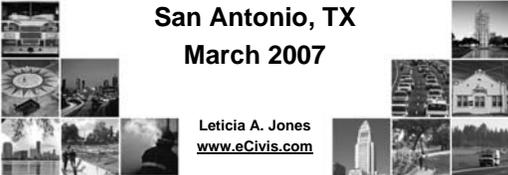
CHANGING THE WAY YOU VIEW GRANTS

eCivis

## Fundamentals of Grants

San Antonio, TX  
March 2007

Leticia A. Jones  
[www.eCivis.com](http://www.eCivis.com)




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### Training Road Map



- Introduction
- Project Planning
- Grants Research & Grants Locator
- Strategic Grant Selection
- Planning the Match
- Preparing for Grant Writing
- Concluding Remarks

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### Schedule

9:00 a.m. Introduction  
\*mid-morning break

12 - 1:00 p.m. Lunch  
\*mid-afternoon break

4:00 p.m. Adjourn



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## Team Introductions

- Your Name
- Your Department
- One unique fact about your department
- Your Level of Involvement in the World of Grants
- "What I would like to learn, by the end of the workshop..."



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## Welcome!

*Let's create a quality learning environment*

- **Learn actively.**
  - Participate. Training is more interesting and productive when everyone takes part in the discussions and exercises.
  - Ask questions. If you're unclear about something, chances are someone else is as well, so ask away.
  - Leave your regular work behind.
  - Please place your cell phone and/or pager on vibrate or off mode.
- **Make a note.**
  - Write down key ideas as you think about them. A lot of information will be covered throughout the training. This will serve as an easy way to remember those brilliant ideas beyond today.

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## Welcome!

CONTINUED...

- **Network.**
  - Among the many learning tools used for the training, networking with colleagues will serve as one of your most valuable resources. You are among peers; share experiences and ideas.
- **Have fun.**
  - You learn more (and retain it longer) when you are having fun.
- **Stay energized.**
  - Rest and Refresh. Take the occasional break to let the information process.
- **Let us know what you think.**
  - We value your opinion. Please fill out and return the evaluation form at the end of class. Thank you.

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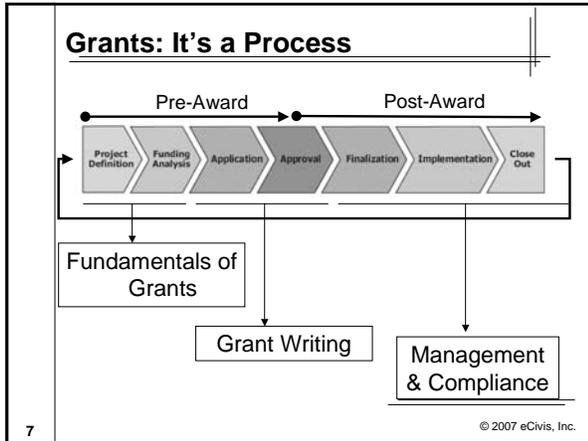
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- ### What You Will Learn Today
- Learn to effectively plan and define a project by utilizing a team including interdepartmental and community-based organization collaboration; use a brainstorming approach to review and analyze different aspects of a project idea
  - Apply a strategic approach to evaluate grant summaries including how a grant award may impact your organization and resources for gaining valuable information about the grant programs
  - Best practices for cash match and innovative ways to stretch dollars through in-kind sources, as well as ways to engage the community and develop partnerships to increase matching funds
  - Developing an effective research approach and common resources for Federal, State, and foundation grant opportunities, including use of Grant Locator to save time, and increase lead time
  - Learn the first steps in the application proposal development process
- 8
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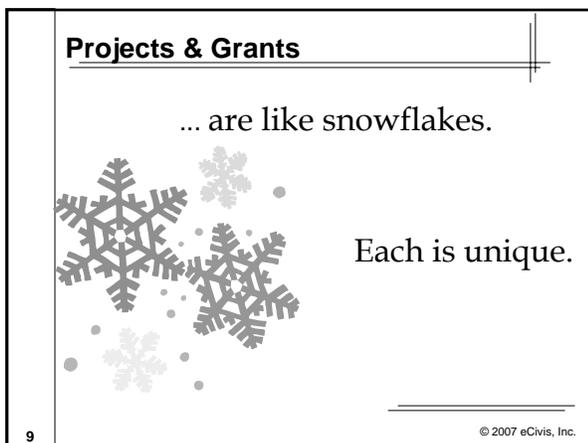
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## Training Road Map



- Project Planning
- Grants Research & Grants Locator
- Strategic Grant Selection
- Planning the Match
- Preparing for Grant Writing

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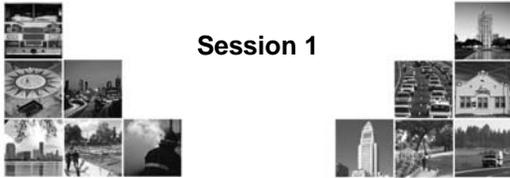
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## Project Planning

### Session 1



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## Learning Objectives

- Understand the importance of a well defined project
- Identifying stakeholders & explore ways for garnering their support to create an effective project/grant team
- Apply & practice essential skills for communicating with coworkers and partners during the planning phases of your project
- Discuss the impact of "Selling the Project" and review different techniques for your approach

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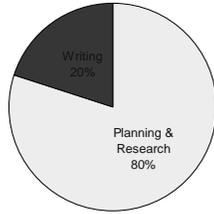
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## The Grants Process

How to Spend  
Your Time



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## Defining Your Project

- Equal understanding of problem and solution
- Appreciation of each other's role and responsibility
- Encourage "out of the box" activities

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## Project Consideration

- There must be REAL need linked to an organizational priority
- Understand the attributes of most "fundable" projects

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## Putting It All Together

- Getting internal structural support
- Consider participants in the planning and implementation process
- Involve stakeholders through responsibility, not merely letters of support

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## Gathering Structural Support

### Example

In Tacoma, WA, to support staff the budget office will send grant notices to departments based on project descriptions kept on file.

- ✓ Strong support of department heads
- ✓ Strong support of administration
- ✓ Strong support of elected body
- ✓ Implementation staff must want these projects before the application is submitted

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## Tips for Getting Support

- Talk to Department Heads and get their support at the beginning
- Are you hearing the message that grants are important? If not, who is the naysayer?
- Show real examples of other communities' successful grant funded projects



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## Stakeholders

- Any individual, group, or organization that influences your project or is affected by it
- Stakeholders can be external or internal to your organization



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## Collaborative Partnerships

### Possible Participants:

- County Departments/Multiple
- Federal Government
- State Government
- Labor
- Other Local Governments
  - City
  - Schools
- Private Sector (For Profit)
- Private Sector (Non-profit)
- Faith Based Community
- Special Districts
- County "chartered" Non-profit

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## Stakeholder Checklist to Consider

- ✓ Years established
- ✓ Previous success with measurable results
- ✓ Availability of cash match, support or in-kind contributions
- ✓ Current staff with proven success in writing, implementing, managing?
- ✓ Any history with particular granting agency

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## **Innovative Collaboration Gets Noticed**

### **Riverside, CA Experience**

- During a quarterly grant meeting instead of reporting out monetary wins, staff began discussing projects.
- Surprised, they realized that many departments were working on the same project. Inter-departmental collaborations were created for joint grant applications.

**This is now a regular part of their meetings**

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## **Beyond Cash...**

How partnerships build strong programs:

- Expertise
- Breaking Barriers... accessing multiple kinds of resources such as additional or different funding as well as human resources in writing, implementation and managing the grants

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## **Documenting the Relationship**

- Which of these is a legally binding document?
  - "Letters of Support"
  - "Letters of Commitment"
  - "Memoranda of Understanding"
    - Letter of Support = Statement of endorsement
    - Letter of Commitment = An intent to invest or participate
    - Memorandum of Understanding = Statement of Partnership

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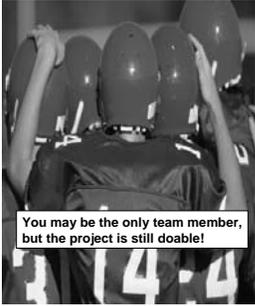
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## Create An Effective Team



- Identify the Stakeholders
- Formulate Plan of Action
  - What are the skills and knowledge required to formulate the project and compile the application?
  - Who will lead the Team?

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## Communication Is Critical

- Clear consensus
- Timeframes
- Mutual expectations
- Who is responsible for what, when, and where
- Formal relationships are best
- Awareness & sensitivity to previous working relationships



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## Exercise

### Effective Communication



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## Effective Communication

- To prepare for this exercise, please take out a blank sheet of paper.
- Be sure to follow the trainer's instructions exactly.



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## Project Planning Meeting: Discussion Points



- Does the project address a public need?
  - Remember this is not your need but the community's need
- What would an improved community situation look like?
  - How will the world become a better place?
- How are you proposing to address the problem?
  - Can you paint a picture in the grantor's mind that is clear and specific?
- What resources will it require?
  - Staff, equipment, funds, facilities

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## Project Planning Meeting: Discussion Points

CONTINUED

- Are matching funds available?
- How will you measure the results?
- How much funding is required for the life of the project/program?
  - Can the project be completed in phases?
  - If so, will each phase be able to significantly address the need?
- What threats and/or opportunities do you foresee?
  - Time, Political Sensitivity, Community Support, Funding, Sustainability, etc.

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## Sample SWOT

INTERNAL		EXTERNAL	
Strengths	Weaknesses	Opportunities	Threats
Proven grant writing ability	Prior compliance difficulties	Strong community support	Change in elected body
Excellent relationship with funder	Lack of retention of key staff	Similar project to past winners	Low leadership support
Tenure of management team	New staff with many projects	Demonstrated need among beneficiaries	Possible negative publicity

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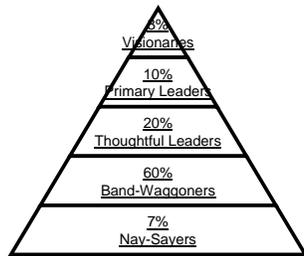
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## Hierarchy of Support



Created by Dick Bowers based on Maslow's Hierarchy of Needs  
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## Tips to "Sell" your Project

- ✓ Identify your beneficiary
- ✓ Identify your approach with internal & external stakeholders
- ✓ Provide clear description of project
- ✓ Define common ground between stakeholder & project
- ✓ "What's in it for me?"
  - **me** = "government", "stakeholders", "beneficiaries", etc.
- ✓ Discuss Plan of Action

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## Tool to “Sell” your Project

- Fact Sheet or “White Paper”
  - Describe specific project in bullet format
  - Timeline for action items
  - Potential Funding Sources
  - Contact Information

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## Additional Tools

- Video presentations (cable channel)
- Town hall meetings
- Meetings with beneficiaries
- Articles
  - newspapers
  - newsletters
  - web site
- Presentations to elected body
- City/County universities

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## Have a Plan

If you don't know  
where you are  
going, you will  
probably end  
up somewhere  
else



~ Lawrence J. Peter

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## Session Summary

- ✓ A well-defined project should address a public need, have adequate resources identified, and demonstrate measurable results.
- ✓ When developing a Project/Grant Team, identify Stakeholders and Identify and resolve conflicts by practicing effective communication skills.
- ✓ Understanding the "Hierarchy Of Support" and other techniques help to identify multiple components to consider when gaining more support for your project

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## Training Road Map



- Project Planning
- Grants Research & Grants Locator
- Strategic Grant Selection
- Planning the Match
- Preparing for Grant Writing

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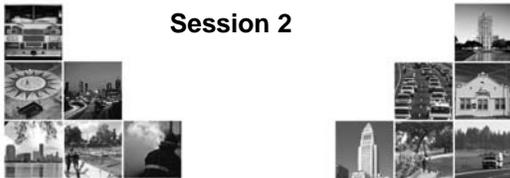
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## Grant Research & Grants Locator

### Session 2



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## Learning Objectives

- Develop an effective grant research methodology
- Explore the primary sources of information on federal funds, & state funds for your project, including using **Grants Locator**
- Define the most common types of grant funding
- Evaluate your grant sources and discuss anticipating grant funding cycles
- Identify and anticipate funding trends in grant programs

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## Funding Analysis: Getting Started



Preparing >> Locating >> Selecting

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## Funding Analysis: Preparing

- Type of project
- Eligibility
- Status of project
- Funding needed
- Brainstorming
- Key words
- Any funding already obtained
- Any special considerations
- Competition assessment

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### “Supplement not Supplant”

- Funds must augment or increase resources, not replace them
- When in doubt, clarify your individual situation with the granting agency

*Think: If these funds had not been available, what would you have done instead?*

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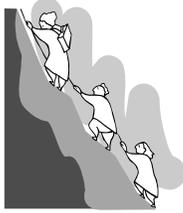
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### eCivis' Find More Grants Tool™



- Identify specific needs rather than general concepts
- Explore multiple components of a project
- Increase potential funding opportunities by considering all the possibilities

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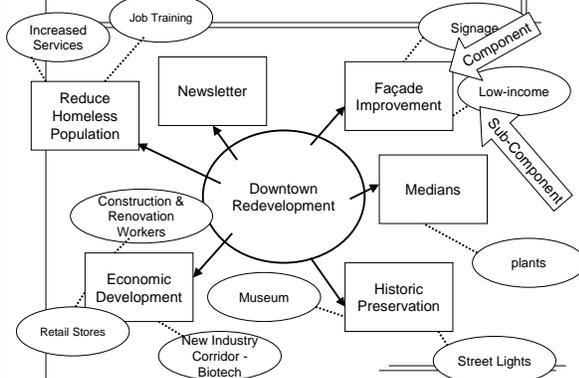
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### Brainstorm for Fresh Ideas



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## Elk Grove, CA Example

- Using eCivis' Find More Grants Tool™ Elk Grove, CA went beyond traditional economic development grants and found the California Cultural and Historical Endowment (CCHE) for its Old Town Revitalization.



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## Projects, Projects, Everywhere!



Childhood Obesity

At-Risk Youth Programs

Smoking Prevention

Drop-Out Prevention

And More!



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## Exercise

### Finding Grants for Your Project



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## Find More Grants Tool™

In small groups answer the following items. Use the Find More Grants Tool™ worksheet as a guide.

- What is the purpose of the project?
- Funding needed over the life of the project?
- Funding needed this fiscal year?
- Funding needed next fiscal year?
- Is cash match available? How much? For which fiscal year?
- Is in-kind match available? Describe.
- Are approvals needed? By whom? Is this politically sensitive?
- List 5 partners, their role and the quality of the relationship.
- List 5 words or simple phrases to describe your project.
- Using one component from #9, list 5 sub-components of your project.

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## Types of Grant Funding

- Federal Funding
  - Formula and Block Grants
  - Discretionary Funding
  - Pass-Through Funding
  - Continuation Funding
- State Funding
- Private and Corporate Foundations

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## Formula and Block Grants

- Non-competitive financial assistance
- Recipients and grant amounts are pre-determined
  - Applicants must meet the minimum requirements of the application process
- Formula Grant vs. Block Grant
  - Formula grant very strictly defined, e.g. Title I, Part A: Improving Basic Programs Operated by LEAs
  - Block grant offers more latitude how funding spent, e.g. HUD Community Development Block Grant

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## Discretionary Funding

- Competitive process of proposal selection based on the evaluation of a reviewer or team of reviewers.
- Recipients are not pre-determined.
- Funding is based on the merits of application.
- Also know as:
  - "Cooperative Agreement" Funding
  - "Project" Grant
  - "Demonstration Project" Grant

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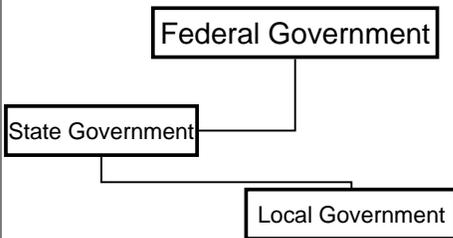
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## Pass-Through Funding



Pass-Through Funding often cannot be matched with Federal monies. Know your funding source.



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## Continuation Funding

Either:

- Applications are only invited from current grantees.

Or:

- Applications are invited from both current and new applicants. Priority is usually given to continuing applicants!

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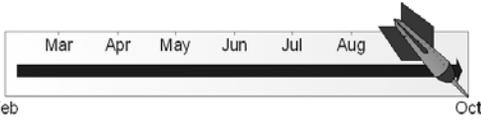
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## The Federal Fiscal Year



New Fiscal Year begins October 1<sup>st</sup>

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After the new year?  
Congress may pass a Continuing  
Resolution

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## Continuing Resolution: Impact on Grants

- Grant programs expected to continue at same levels of funding
- “Final funding amounts pending Congressional approval”, applicants must keep up with application process
- Solicitation may be delayed until the budget is passed

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## Researching State Grants

- Funding priorities often change annually so check for updates
- Develop relationships with legislative staff to influence priorities
- Track funding through appropriations process

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## Researching Foundations

- Fund a broader range of projects than governmental agencies
- Timetables for submission vary greatly
- Generally have fewer reporting requirements
- Most awards are small compared to federal or state grants

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## Researching Foundations continued

- Federal 990 tax forms are required of charities with gross receipts over \$25,000 annually and of foundations.
- Looking at these IRS returns you can find:
  - If the foundation received any contributions during the year
  - Total assets (five percent of which must be spent on programs, including grants each year)
  - A list of each and every grant they made

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## Funding Analysis: Locating

- Federal agency or State web sites
- List-serves
- For-fee internet grant sites
- Professional Organization Staff
- State Legislature or Congressional Staff
- Grant Program Officers

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## People Who Can Help Identify Grants

- Reference Librarians
- State League Staff
- Professional Organization Staff
- State Legislature or Congressional Staffers
- Intergovernmental Affairs staff
- Board Members of Foundations
- Program Officers

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## Helpful Websites

### FEDERAL

- Office of Management & Budget
  - [www.ExpectMore.gov](http://www.ExpectMore.gov)
- Catalog of Federal Domestic Assistance
  - [www.cfda.gov](http://www.cfda.gov)
- Grants.gov Initiative
  - [www.Grants.gov](http://www.Grants.gov)

### STATE OF TEXAS

- Office of the Governor
  - <http://www.governor.state.tx.us/divisions/stategrants/resources>

eCivis' Grants Locator  
[www.ecivis.com](http://www.ecivis.com)  
\*\*1-Stop-Shop for Federal, State and specific Foundation grants\*\*

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## eCivis™ Grants Locator

- Web-based, grant-specific database of researched funding opportunities that includes:
  - All Federal
  - All State
  - Specific Foundations
- Support
  - Assigned support staff to ensure success
  - Onsite, online, phone based training



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## Grants Are Not Static

- 20 - 200 new grant solicitations are solicited per week
- Nearly the same amount of grants per week are NOT solicited
- 80% of grant programs resolicit from year to year --- 20% Do Not
- The 80% that do renew can and often do change from year to year
  - For example, solicitation dates change, grant focus changes, etc.

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## Evaluate Your Grant Research Sources

- Executive Summaries of the program with decision making criteria that help you quickly determine if a grant has that 90% match you seek
- Alerts sent when a grant matches one of your projects
- Alerts sent when a change to one of the grants you are applying for changes
- Continual updates to programs
- Timely identification of original solicitation
- Accurate and updated grant deadlines including cancellations
- Competitiveness data
- Easy access to NOFA/RFP and application information
- Quality relationships with program officers

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## Evaluate Your Grant Research Sources

continued

### **More tools for evaluation:**

- current and historical award information
- intended and typical recipient
- A library of previously funded applications
- easy sharing of applications with stakeholders



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### **Research Funding Trends**

- Ask Congressional or State Representatives
- What buzzwords are in the mass media?
- Review current events
- Any large budget increases/cuts during Federal or State budget talks?
- Unfunded mandates

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### **Current Funding Trends**

- Evidence-Based Research
- Matching Resources
- Collaboration and Regionalization
- Public Input
- Results-Oriented
- Sustainability
- Others?

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### **Information Management**

- Set up your funding database as a tracking tool
- (At a minimum) Make searchable by:
  - Eligibility / Funding source / Application date / Average funding amount / High vs. low priority
- Create different search categories to suit your needs
  - e.g. Gang prevention, Teacher education, Childhood health, High School reform, etc.

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### Next Step: Selecting

- Your Goals vs. Grantor's Goals and Priorities
- Project Funding Requirements vs. Average Grant Award
- Pre-application Requirements
- Matching Requirements
- Eligibility Requirements
- Reporting Requirements
- The Competition
- Stakeholder Influence

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### Grants Research: Tips

- Start Early
- Plan Ahead
- Take advantage of the resources available
- Use your network of colleagues to stay aware of trends
- Know the grantor's priorities
- Try different search terms and combination of search terms
- Broaden your search
- Be creative (and organized) in your approach

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### Session Summary

- ✓ Using the methodology of brainstorming and analyzing funding trends provides you with several possibilities for potential funding
- ✓ By developing an *effective* research approach and understanding your most common sources, including the use of **Grants Locator** saves time and increases your lead time

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## Training Road Map



- Project Planning
- Grants Research & Grants Locator
- Strategic Grant Selection
- Planning the Match
- Preparing for Grant Writing

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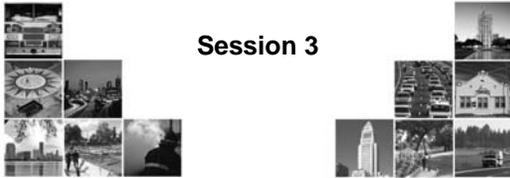
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CHANGING THE WAY YOU VIEW GRANTS

## Strategic Grant Selection

### Session 3



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## Learning Objectives

- Identify factors to consider for grant / project compatibility and tools to compare your project with potential grants
- Understanding key selection components from the grant announcement
- Learn how to gain additional insight from the Program Officer and begin building a relationship with the granting agency *before* you apply

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## Choose Wisely



We trust in man and still we use to shape the feet to the shoes. A future world with less conceit will shape the shoes to fit the feet.

- Piet Hien

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## Compare Grant to Project

### ➤ Compare each potential grant to the project

- open grant opportunities
- expired grant opportunities (with potential for renewed appropriations)
- pending legislation

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## Key Areas for Grant Selection

- Eligibility
- Pre-application requirements
- Funding Amounts
- Due date and timeline
- Competitiveness of grant program
- Compliance reporting burden
- Stakeholder influence

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## Eligibility Guidelines

*Don't make assumptions!*

- Make sure you are eligible before applying!
  - Common terms can be misinterpreted
  - Any doubt, contact the Program Officer
  - Read the fine print

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## Eligibility as Shown in a NOFA

From the US EPA

Eligible applicants, including those with existing brownfields grants, may apply for one, two, or all of the grant programs. The following table indicates, by grant program, what types of entities are eligible to receive EPA funds for brownfields assessment, RLP, and Cleanup grants.

Type of Applicant	Assessment	RLP	Cleanup
General Purpose Unit of Local Government*	✓	✓	✓
Local Clearance Authority or other quasi-governmental entity that operates under the supervision and control of, or is an agent of, a general purpose unit of local government	✓	✓	✓
Government Entity Created by State Legislature	✓	✓	✓
Regional Council or group of General Purpose Units of Local Government	✓	✓	✓
Redevelopment Agency that is chartered or otherwise sanctioned by a state	✓	✓	✓
State	✓	✓	✓
Indian Tribe other than in Alaska*	✓	✓	✓

Grants Locator capability

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## Pre-Application Requirements

- Carefully consider any Pre-Application Requirements
- Letter of Intent (required or optional)
- Required Bidder's Conference
- Required Pre-Site Visits
- Contacting Program Officer or online registration for application deadlines

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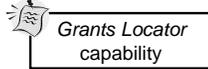
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## Letter of Intent to Apply (LOI)

- Requested or *Required* ?
- Might be a simple, one-page form
- Might be a required, full project description
  - Selected applicants are asked to continue



From North Central Texas Child Services Grant

Proposal Release Date	Pre-Proposal Conference	Notification of Intent to submit proposal	Proposal Due Date	Board Selection	Anticipated Contract Start Date
May 28, 2003	June 11, 2003 1:00 p.m.	June 13, 2003	June 27, 2003 12:00 p.m.	July 22, 2003	September 1, 2003

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## Will Award Fund Entire Project?

- If the award does not cover the entire project consider multiple project phases and other funding sources
- Be sure to factor project costs and application development/compliance costs into award amount decision
- Availability of future funding
  - demonstration grants
  - known sunset dates
  - annual reduction in total appropriations

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## Exploring the Nuances of Funding

- Cash match on hand versus awaiting approval, fundraising or partnership
- Award is advanced or reimbursable
  - potential impact on budget



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## Special Considerations & Priorities

- Are there any special eligibility terms that make you more or less likely to be awarded?
  - Locality
  - Targeted demographics
  - Previous history with granting organization
  - Designated area such as an Empowerment Zone
  - Quality relationships with Board Members or high level officials

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## Priorities and Absolute Priorities

economically distressed urban and rural communities with access to information technology and related training.  
**Priorities:** These priorities are from the notice of final requirements, priorities, and selection criteria for this program, published elsewhere in this issue of the **Federal Register**.  
**Absolute Priorities:** For FY 2004 these priorities are absolute priorities. Under 34 CFR 75.105(e)(3) we consider only applications that meet these priorities. If you are not a novice applicant, as defined elsewhere in this notice, you must meet both priorities. Your application will be declared ineligible and will not be read if you do not address both of the absolute priorities. If you are a novice applicant, you must meet at least the second priority or your application will be declared ineligible and will not be read.  
These priorities are:  
**Absolute Priority 1**  
This priority supports projects by

- Absolute Priority
  - MUST fulfill this priority in order to be considered
- Priority
  - SHOULD meet one or more to be competitive

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## Days until Application is Due

- Consider counting the work days until the application is due
  - Do you have the time create a **quality application**?
  - Should you wait until the next cycle so that you can submit a more competitive application?
- Determine if deadline has passed for an agenda item for your authorizing body

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## Due Date

***Due dates are not flexible!***



“Applications must be postmarked by the due date.”

OR

“Applications must be received by the due date.”

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## Example of Due Dates

NOFA for State of Illinois  
AmeriCorps Grants



Grants Locator  
capability

**Due Date, Location and Time of Proposal Delivery Requirement**

Applications must be received **no later than 5:00 p.m. Central Standard Time (CST) on January 24, 2006**. The proposal container will be time-stamped upon receipt. The Department will not accept applications submitted by electronic mail, on diskette, or by facsimile machine. Submit your completed grant applications to:

Attention: Brenda Letcher  
Illinois Department of Human Services  
Division of Community Health and Prevention  
Bureau of Community-Based and Primary Prevention  
Illinois Commission on Volunteerism and Community Service  
535 West Jefferson Street, 3rd Floor  
Springfield, IL 62702-5058

*NOTE: To be considered, proposals must be in the possession of Illinois Department of Human Services staff at the specific location and by the designated date and time listed above. This deadline will be strictly enforced, without exception. In the event of a dispute, the applicant bears the burden of proof that the application was received on time at the location listed above.*

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## Time to Prepare Quality?

- Honest review of the lead grant writers calendar
  - Calculate number of applications in process
- Honest review of schedule for staff assisting with data collection, project description, etc.
- Decide which programs to apply for by weighing the program requirements against the needs and capacity of your organization.

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## Project Period

- The time permitted for the implementation of the project.
- Activities to be funded must begin and end *within these parameters*.

 Grants Locator capability

**II. Award Information**  
Type of Award: Discretionary grants.  
Estimated Available Funds: \$10,000,000. Up to 25 percent of the available funds will be set aside for novice applicants.  
Estimated Average Size of Awards: \$350,000.  
Minimum and Maximum Award Amounts: The minimum award amount is \$250,000 and the maximum award amount is \$500,000, for the 12-month project period. No grant application will be considered for funding if it requests an award amount outside the funding range of \$250,000 to \$500,000.  
Estimated Number of Awards: 18-25.  
Note: The Department is not bound by any estimates in this notice.  
Project Period: Up to 12 months.

**III. Eligibility Information**  
1. Eligible Applicants: Eligible applicants are non-profit entities, such as a foundation, museum, library, for-profit

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## Is the Application Complex?

- Short versus long/detailed versus general
- Availability of required information
- Development of team to complete application process
- Status of relationships with stakeholders and collaborating non-profit organizations

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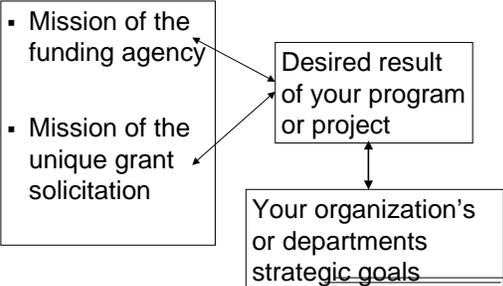
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## The Funding Agency & You



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## Are You the Typical Recipient?

- Research competitiveness of program
  - Who are your competitors in this funding cycle
  - What is historical competitiveness of program
    - applications received versus awards made
- Potential Grant Conflict
  - Effect on eligibility
  - Pros & Cons of competing with yourself



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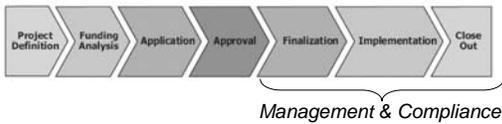
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## Compliance Reporting Burden

- Analyze effect of award on staff
  - Complexity of reporting and compliance
  - Infrastructure for data collection
  - Effect on audit requirements
  - Research historical compliance burden



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## Stakeholder Influence

- Stakeholders may be a key part of the project
  - level of relationship with stakeholder
    - low, offering a letter of support only
    - medium, prior relationship with other staff
    - high, proven successful working relationship
  - stakeholders weak or strong relationship with funder
- Optional versus required Stakeholder support

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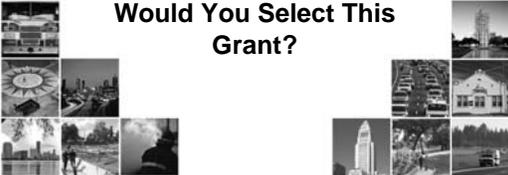
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CHANGING THE WAY YOU VIEW GRANTS

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## Exercise

### Would You Select This Grant?




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### Would You Select This Grant?

- ✓ Using the scenarios in your workbook, would you move forward with the grant applications?
- ✓ Be prepared to justify your selection.



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### Getting the Information You Need

When the information you need for grant selection is not included in the NOFA...

Contact the Program Officer!



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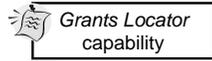
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### Program Officer >> Resource

- Get as much valuable information as you can to help with grant selection
- To develop a relationship and build rapport
- To find out about errors or changes to the NOFA



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### Key Relationships Can Aid in Decision Making

- Strong Relationships with Program Officers can
  - get a quicker response to questions
  - give insight on grant solicitation
  - suggest other grants for projects

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### Learning Common Terminology

- Learning the terminology is crucial when venturing into the the world of grants. Some of the terms you find through out the process will apply only to Federal and State Funding, some only apply to Foundation funding but many terms apply to both.



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## Prepare Before You Contact

- Mark any areas of confusion, inconsistencies or questions
- Prepare a quality description of your proposed project
- Write a list of your concerns...you may have limited time to talk to the Program Officer
- *Thoroughly* read the NOFA!
- Federal Grants: Know the CFDA number, as it is a key reference number to identify the program



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## Making Contact

- 
- Be respectful of instructions in NOFA
- Attend Bidder's Conferences/ Workshops
  - Contact appropriate Program Officer if there is more than one \_\_\_\_\_

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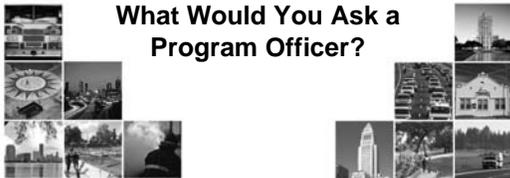
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CHANGING THE WAY YOU VIEW GRANTS

## Exercise

What Would You Ask a Program Officer?



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**What Questions**

**Would You Ask A Program Officer?**

Working with one or more partners, create a list of 10 standard questions for Program Officers on your flipchart.

After all groups have posted their questions, we will create a list of 10 questions that you should ask all program officers.

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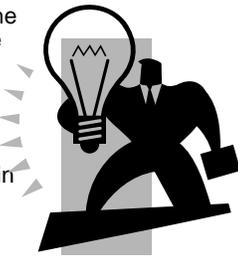
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**Suggested Questions**

- Can you confirm the amount available and the number of awards to be given?
- What types of entities and/or projects have been most competitive in the past?



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**More Questions**

- Historically, what percentage of the funding request was provided by successful applicants?
- What percentage of matching funds is recommended to be competitive?
- Do we gain additional points for exceeding the stated match requirements?
- Is the application more competitive if all or a portion of the match is provided by community partners or other stakeholders?

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### Still More Questions

- Do you have a list of previously funded applicants?
- Is only cash acceptable as the match? If in-kind is permitted, what types of contributions are eligible? Is cash or in-kind preferred?



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### What Program Officers Are Saying

- “Increased cash match always adds at least 15 points to an application.”
- “Increased cash match never adds any points”.
- “We prefer cash over in-kind, and an additional point or two will be given based on the amount of the match”
- “Match from collaborators is less appealing to us. Too often the government must come up with the match when the pledge falls through.”

*Statements from program officers from various Federal HHS grants.*

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### Session Summary

- Carefully consider the factors of compatibility between the grant and the project and re-focus your efforts if you have grants that are not truly compatible
- Begin a positive relationships between your organization and the funding agency to gain additional insight and possibly a competitive edge!

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## Training Road Map



- Project Planning
- Grants Research & Grants Locator
- Strategic Grant Selection
- Planning the Match
- Preparing for Grant Writing

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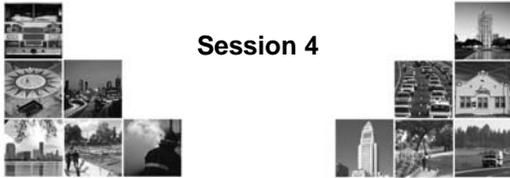
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CHANGING THE WAY YOU VIEW GRANTS

## Planning for the Match

### Session 4



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## Learning Objectives

- Define matching funds and explore sources of for your matching funds
- Share best practices and strategies for engaging your community partners as a resource for providing contributions
- Learn how to calculate & track the value of your contributions
- Develop and explore ways for generating matching funds

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### What Are Matching Funds?

Many funding sources will pay only a percentage of the total cost of a project.

The grantee is required to pay the difference with money or non-cash donations from other sources.

*The grantee's contributions are called matching funds.*

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### Why Learn About Match Funds?

Matching funds have an important purpose throughout the grant process

- Project Planning
- Funding Analysis
- Application
- Approval
- Finalization
- Implementation
- Close-Out

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### Fact Check

**27% of Federal Grants**  
**21% of large Foundation Grants**

REQUIRE matching funds!

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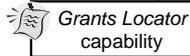
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## Matching Funds

Also called:

- Cost sharing
- Cost participation
- Leveraging
- Demonstrating local support



From the FL Disabilities Council:

Mandatory in each proposal is a match requirement of not less than 25% of the total project costs, amount to be finalized as part of the negotiations process. Grantees must match \$1 for every \$3 requested to reach a 25% match of the total approved cost of the project. Documentation of 25% match of project expenses must be maintained. The match requirement may be satisfied by values placed on in-kind contributions or through solicitor-incurred costs, or by a combination of the two. Not more than 50% of said match requirement shall be "in kind" match. Costs paid by other federal grants may not be used for match. The match must fund activities directly related to the project. Indirect cost is calculated on and cannot exceed ten percent (10%) of total salary and fringe benefits. *Note: To calculate the match share for the 25% required match, divide the amount of your request by three. Then, to calculate the total grant amount, combine the one-third figure with the dollars requested (i.e., funds requested \$10,000 divided by 3 = match amount of \$3,333.33. \$10,000+\$3,333.33=total project cost of \$13,333.33).*

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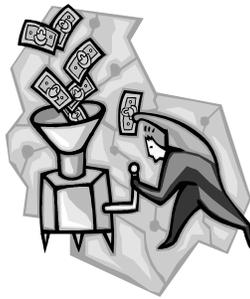
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## Types of Matching Funds

- Cash
- In-Kind

Understand your match requirements and how you will meet them before applying!



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## Sources for Your Cash Match

- Your department's budget
- Other grants
- Other department's budgets
- Community partners' support
- Loans
- Lines of credit

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**Matching Funds  
Over the Life of Your Project**

**Example**

	Grant Funds	Cash Match
Year 1	\$100,000	\$25,000
Year 2	\$75,000	\$50,000
Year 3	\$35,000	\$60,000
Year 4	\$5,000	\$80,000
Year 5	\$0	\$90,000

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**Questions About Your Budget Process**

- In which general ledger category do you find funds for a match requirement?
- Do you need your elected body's approval before *applying* for a grant that requires a cash match?
- What is your process for making a budget request for a cash match?
- Is it possible to allocate funds in future fiscal year budgets?



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**Other Grants**

Use foundation grants, state grants and federal grants as match.

\*Be aware of some federal grants that do not permit a match with other federal funds.

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## Other Departments' Budgets

Example

Transportation	\$80,000
Public Safety	\$50,000
Manager's or Mayor's Office	\$15,000
<b>Total</b>	<b>\$145,000</b>



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## Example: Organizational Support

- Alameda County, CA (pop. 1.4 million)
  - Has strong belief in the power of leveraging that comes from a cash match
  - In the budget process, match funds are among the last to be reduced and or entirely cut
  - County realizes that cutting \$50,000 from the budget is the equivalent of cutting between \$100,000 to \$150,000 with a 1 to 3 match

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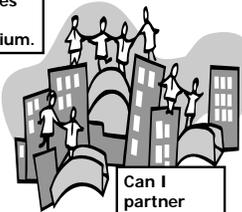
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## Engage Community Partners

Pool your resources as a consortium.



Can I partner with a non-profit, a school, or a university?

- They may have cash or in-kind resources to provide as a match.
- They will be eligible for additional grant programs and may serve as the lead applicant ("fiscal agent").
- They might organize fundraisers for your shared projects.

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### Types of Fundraisers

- Walk-a-thon, 5K, 10K, or marathon to support park land acquisition.
- Benefit concert or comedy night for arts or cultural programs.

These do have costs involved. Consider if costs outweigh potential cash benefit.



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### Seek Outside Cash

- Engage local corporations
- Sell surplus items or reallocate funding from sale of surplus



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### Great Valley Center in Modesto, CA

**Example**

- Recently awarded \$75,000 in federal funds to develop an Agri-Food Research Institute at UC Merced. Will create jobs and support agricultural production and marketing.
- Matching funds came from seven organizations:
  - John Deere, Wells Fargo Bank, E & J Gallo Winery, California Poultry Association, Bennett Farms, Pacific Gas & Electric Co, and Del Monte Foods.

*Corporations have a stake in the community!*

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### Approach Local Foundations for Small Sums

- ✓ Find them on the Internet, in the phone book, and through personal contacts.
- ✓ Send a one-page letter of interest, stating the need, to 25 foundations and see what comes back. Request \$250 to \$1000.
- ✓ Also develop relationships throughout the year and discover their areas of interest.

When you require cash for small matches, these relationships will come in handy!

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### Sources for Your In-Kind Match



- Equipment
- Volunteers
- Donated Goods and Services

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### In-Kind: The Good, Bad & Ugly

#### GOOD

- In-kind can amount to a sizable contribution.
- In-kind can make the leap possible from ineligible to eligible.
- In-kind demonstrates local support, even when your organization is struggling financially.

#### BAD

- Difficult to calculate
- Difficult to track

Some applicants don't bother with in-kind matches for these reasons.

#### UGLY

- Management & Compliance Issues

**Don't overlook your "hidden" resources!**

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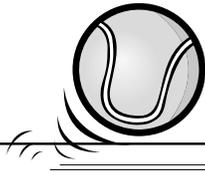
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## Equipment

*Obtaining donations can open doors for grants.*

- Computers
- Telephones
- Copiers
- Automobiles
- Stoves or Refrigerators
- Televisions
- Sports Equipment



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## Volunteers

*In-kind hours can be used as required matching funds for most federal and state grants.*

- Volunteer hours must be recorded!
- Volunteer time is not tax-deductible. It is an in-kind gift.
- If the value of the volunteer time is not specified by the grantor, you may assign a reasonable value

**Always justify values and cite your sources.**

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## Researching Hourly Rates

1. Bureau of Labor Statistics: [www.bls.gov](http://www.bls.gov)
  - Look up wages "by area and occupation"
  - Search "regional wage data for census divisions"
2. Web Resources:
  - free or fee-based sites
3. Use the rate of your regular employees who complete similar tasks

**Remember to check the grantor's guidelines first.**

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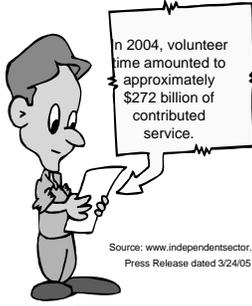
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## Americans ARE volunteering!

- 2004 Estimate of Volunteer Time: \$17.55 per hour

This is based on the average hourly earnings of all nonagricultural workers as determined by the U.S. Bureau of Labor Statistics. This is increased by 12 percent for fringe benefits.



Source: www.independentsector.org  
Press Release dated 3/24/05

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## Correct Value of Volunteer Hours

Nationally, a qualified general practitioner medical doctor is valued at \$65 per hour. At 100 hours this is \$6500 of match. Compare this to the general national average of \$1755.

*Which value would you rather use?*



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## Donated Goods & Services

- Anything that can be sold can also be given away.
- Approach vendors for donations before you pay for land, goods, or services for a project.
- Calculate donations at "fair market value."

### Examples:

- professional services such as doctors, architects, lawyers & accountants
- land or buildings
- printing or copying services
- food, beverages and associated supplies

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CHANGING THE WAY YOU VIEW GRANTS

eCIVIS

## Exercise

### Exploring Matching Funds

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### Exploring Matching Funds

With your trainer's guidance, get into small groups. For 7-7-7...

*Using your flipchart, write down*

- 7 ways you have found matching funds in the past
- 7 ways that you have considered finding matching funds
- 7 wild and crazy ways to secure match funds

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### Session Summary

- ✓ Match funds are an important method of increasing funding for projects
- ✓ Is Important to seek out all available resources for your cash and in-kind contributions for continuing and fostering community support
- ✓ Avoid management and compliance issues by accurately tracking and understanding the value of your in-kind contributions

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## Training Road Map



- Project Planning
- Grants Research & Grants Locator
- Strategic Grant Selection
- Planning the Match
- Preparing for Grant Writing

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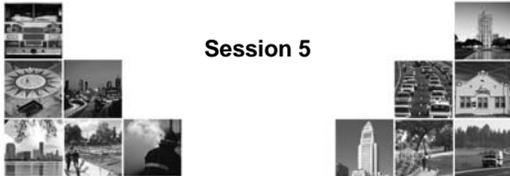
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CHANGING THE WAY YOU VIEW GRANTS

## Preparing for Grant-Writing Success

### Session 5



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## Objectives

- Develop your first steps in the critical planning phase of the application process and share best practices in project organization
- Discuss how to prepare yourself before you begin writing your application

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### What Is a Grant Proposal?

- A request for funding or technical assistance to address a specific public need.
- Grant proposals are most often written to seek funding for a specific project within a larger organization.

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### The Critical Role Of Planning

- NOFAs have deadlines and if your organization has not planned properly you could miss the deadline or submit a poor proposal!



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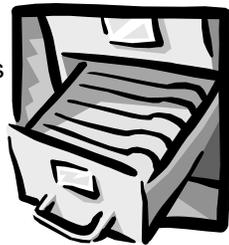
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### Organize: Create a Project File

- Begin in the planning phase and keep through Close-out
- Paper files or Binders
- Electronic Copies
  - intranet
  - CD-ROM storage



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### Key Information for Project File

- Have the Information You Need Handy
  - Leadership & Staff Bios
  - Results of previous grant successes
  - Who has the relationship with the program officer? Are they bought-in?
  - Reliable stakeholders
  - General information on community
  - Data collection & analysis techniques
  - DUNS identifier

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### More Information for the Project File

- Detail on match fund requirements
- Award agreement
- Written reason for grant rejection
- Completed internal grant request form
- Information on budget calculations
- Written communication between team members
- Fact sheet on project

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### Checklist Before Writing

- ☒ Are you prepared to follow all instructions?
- ☒ Can you meet the grantor's priorities?
- ☒ Are you realistic?



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### Think About Good Support Team Members

- Identify others who have successfully written grants before
- Identify colleagues to help with writing, budget, implementation plans, critical review, etc.
- Consider including management & compliance staff during planning to avoid surprises later

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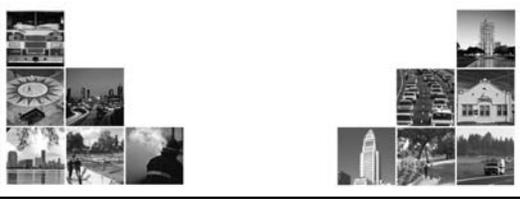
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### Concluding Remarks



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### Training Highlights



- Project Planning
- Grants Research & Grants Locator
- Strategic Grant Selection
- Planning the Match
- Preparing for Grant Writing

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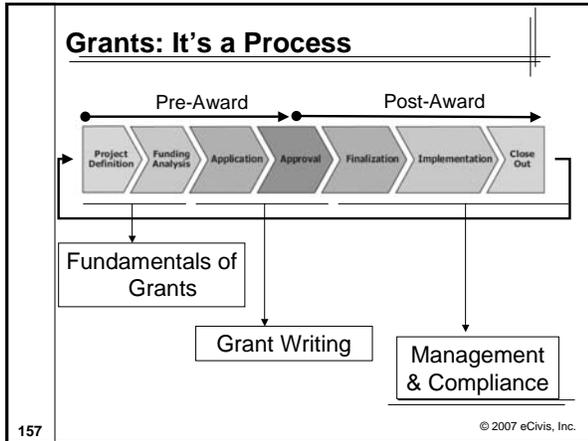
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### Moving Forward

*"A journey to a thousand miles begins with the first step."*  
~ J. F. Kennedy

Determine What You Can Do

- Immediately
- Next 3 – 6 months
- Within next 12 months

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CHANGING THE WAY YOU VIEW GRANTS

## Congratulations!

### You've Just Completed Fundamentals of Grants!

Visit [www.ecivis.com](http://www.ecivis.com)  
Email [info@ecivis.com](mailto:info@ecivis.com)  
Call 877.232.4847

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