Cultivating Practices for Successful Grantsmanship

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Today’s Discussion

• The Basics for writing ANY grant
• Mechanics of a proposal - being prepared to apply
• Knowing your funders
• Breakout Activity – funding your project!
• Grantsmanship – With special notes on how not to be funded

Grantsmanship

What is the purpose of seeking a grant?
• Financial assistance to meet the defined outcomes of a well-planned project
• Funding a project that aligns with your agency’s mission

Building relationships with
• Community partners
• Funding agencies
Who Needs Funding Assistance?

- Know what you need
- Have basic documentation
  - Identify & document needs
  - Define goals
  - Align with mission
  - Past success
- Potential partners
  - the power of networking

When to Seek Funding

- Know what you need
- Have basic documentation
  - Identify & document needs
  - Define goals
  - Align with mission
  - Past success
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What to know before you start

- Community Issues
  - Identifying Problems / Barriers
  - What is needed to address those problems?
  - What is your agency role?
- Understanding & Communicating
  - Needs & Agency Role
  - Documentation & Telling the story
- Setting goals
- Strategies to reach goals
  - Identifying partners, establishing roles
- Documenting success
What Proposals Have in Common

- Who, What, When, Where and Why
  - Who you are (agency)
  - Who you serve (identify problem, audience)
  - Why this is the solution (needs)
  - What your project will do (goals)
  - How it will accomplish set goals (methods)
  - How you will measure success (evaluation)
  - How to fund project (grant, in-kind, other)
  - Future – project sustainability

What Request for Proposals Have in Common (RFP’s or Application Documents)

- Detailed Instructions
  - READ them
  - FOLLOW them
  - ASK Questions
- Guesstimate: 50% of proposals are rejected for NOT following instructions

Projects that need funding assistance

Work in groups of 2-3 people to identify:
1. problem,
2. needs, and
3. solution to seek grant funding
### Funding Sources

- Government, Foundation, Corporation

- **Understand differences**
  - Available information (RFP)
  - Application procedures
  - Type of Support provided
  - Sources of money
  - Decision making timeline

### Grant Basics Toolkit

- **Problem:** identified from needs assessment (and funder’s perspective)
- **Objective:** snapshot of end of program (based on program goals & purpose)
- **Methods:** what will be done to address the problem (approaches, strategies, etc.)
- **Evaluation:** how effectiveness and objectives are measured
- **$ Budget:** costs (supplies, personnel, operational, etc., know eligible costs)

### Tools for Preparation

**POME$ Chart**

- Problem
  - Identified from needs analysis
  - Linked to Funder’s viewpoint
- Objectives
  - Snapshot of what will be at the end of the project
  - Based on goals, and objectives of the program
- Methods
  - What will be done to project the problem
  - Approaches strategies
- Evaluation
  - How project effectiveness will be measured
- Budget
  - Costs to implement this project
Define the Problem

- Identifying needs
  - Support documentation
  - Needs Analysis, Data, Results
- Link to Interests of the Funding Source
  - Geographic area
  - Population group
  - Type of Activity

Objectives

- Goals – what will project accomplish?
- Big Picture Focus vs. Project Focus
  - For proposal to specific grantor – project focused
- Clearly state end results

SMART Objectives

- Specific
- Measureable
- Achievable
- Realistic
- Time-bound
Methods

• How will you meet program objectives?
• Overall approach to address needs
  – Strategies the project takes to impact the problem

Evaluation

• How effective was your project
  – Is money well spent?
• You must measure results
  – pre / post survey of participants
  – numeric measures: participation, health information, related testing
  – evaluations: staff, participants, other…

Budget

• What will it cost to implement the project?
  – Be realistic and don’t forget indirect costs
• Categorize budget items
  – Personnel costs, benefits, overhead
  – Equipment
  – Travel
  – Materials
Budget: what is eligible

- Know what items are eligible for grant funds (indirect costs / overhead typically not eligible)
- Is a match required, preferred?
  - Know what can be used as matching funds
  - Know if in-kind services are permitted
- Timeline for expenses
  - Can pre-award expenses be covered?

Show me the $$$

1. Refine your proposal using the POMES chart.
2. Prepare to “shop” your proposal to our funders.
Today's Funders are ready to talk

1. Meet with funder representative
2. Discuss (sell) your project (elevator pitch)
3. Get feedback for improvement to meet their needs
4. Bring home the $$$

In Summary: Mechanics of a Proposal
Know your Mission

- What is your Agency Vision, Mission
  - Does your project proposal fall within the mission?
  - Does your agency support this project

Know your Needs

- Always evaluate needs
  - identifying issues, problems
  - needs analysis (what are sources for data?)
- Be able to communicate needs
  - public, elected officials, media
- Have wish list
  - project ideas to address needs
  - think out of the box

Know your Partners

- Staff within your agency
  - brainstorm, share program ideas
  - projects that meet multiple objectives
- Outside the agency
  - other departments
  - other agencies
- Potential Funders
  - staff, board members
Project Team

- Understand the mission, project goals
- Clearly define roles, tasks
- Meet often
  - Preparing the proposal
  - Managing the grant
  - Documenting results
  - Evaluation

Do's and Don'ts

Do
- Make a compelling argument
- Know your budget numbers (plan for cost overruns, have complete list of needs)
- Meet the needs of your customers
- Ensure project aligns with agency mission

Don’t
- Neglect engaging impacted community partners
- Propose a project that does not align with funder goals
- Use too much jargon in your proposal
- Ignore instructions or funder deadlines
- Wait until the last minute!

What is Granstmanship?

- Identify Opportunities
  - Know your needs
  - Idea List
  - Resource to search
- Proposal Development
  - Cost estimates / Budget
  - Key personnel
  - Support Data
  - Outcome measures
- Work w/ Partners
  - Communicate
  - Meet Obligations