Federal Grant Writing Manual

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EXECUTIVE SUMMARY

One challenge that many organizations, coalitions, businesses, groups and networks face is lack of funding. This can be particularly hard when limited resources, such as staff time or money, are available to allocate to writing grants. This *Federal Grant Writing Manual* was developed specifically to help grant applicants prepare for – and write – a federal grant proposal. It starts from the very basics of looking at what a grant is and assessing whether or not an applicant is qualified to apply for a federal grant. The Manual then delves deeper into the art of grant writing by delivering information on specific parts of proposals including: developing goals and objectives; putting together a budget; developing work plans; and outlining specific frameworks to use to help an applicant stay organized and focused during the grant writing process. It also includes information on project sustainability and how to evaluate the grant project.

Of course, as with any manual or guide, it is best utilized when combined with individual knowledge and skills. This Manual is intended to support and strengthen grant writing skills in an applicant and the reader is encouraged to use this Manual as part of a continuous effort to build the knowledge, expertise and success of their organization!

*Please note the terminology used in this Manual may not match the terminology of the grant an organization may be applying for as terminology can vary from different funding agencies.

SECTION 1: PREPARING FOR THE GRANT

What is a Grant?

Simply stated, a grant is money given to support specific purposes, topics or causes. It is payment for services to be provided with legal obligations to deliver services outlined in the grant proposal. A funding agency that provides money for a grant sends out a Request for Proposal (RFP) that is consistent with their mission. They can also be referred to as the grantor. A grant proposal is a formal offer to perform certain tasks if a grant is funded, submitted by an applicant which can be a single entity or organization or multiple organizations or groups jointly submitting an application. When a grant proposal is funded and accepted by the applicant, the applicant, then termed a grantee, is obligated to complete the tasks they stated in the proposal. Once a grant is funded, a formal relationship exists between the federal funding agency and the applicant receiving the funding, the grantor and the grantee. To spend federal grant funds in any manner other than what was outlined in the proposal is a violation of the agreement.

Meeting the Federal Grant Qualifications

When looking for information regarding the parameters of federal grants, the best place to start is at: http://www.grants.gov. This website was created to provide a place for all federal grant opportunities. It is meant to streamline and simplify the way the federal government executes grants by providing a central online system to find and apply for grants across the federal government.

When an applicant receives a grant or cooperative agreement award, it will list general terms and conditions, such as Office of Management and Budget (OMB) Circulars and agency regulations implementing government-wide requirements. OMB requirements can be found at: http://www.whitehouse.gov/omb and the agency's regulations may be found at the agency's website or by a search of the Code of Federal Regulations (CFR).

It is important to make sure that the work an applicant is doing, once funded, falls within the scope of the grant. An applicant should ask itself whether or not the work it is doing fits with the purpose of the grant. Is it addressing stakeholders needs while staying within the purpose of the grant? If an applicant has been working on a renewing grant for many years, it is possible that its scope may change over time. As the grant changes, are the activities changing to maintain alignment with purpose, focus and stakeholder needs? For more information about streamlining activities with the grant, visit: http://www.grants.gov/web/grants/about/grant-regulations.html.

Defining Purpose and Anticipated Accomplishments

Develop a Purpose Statement

When an applicant is preparing to write a federal grant proposal, a clear vision of why the applicant is applying and what the applicant is going to do with the grant is essential. To showcase the applicant's expertise, start by developing a purpose statement. It should be a brief statement that tells anyone (including non-subject matter experts) who the applicant is, why it is a good fit for this grant and what it intends to do with the grant. This will help the applicant develop a sense of direction before writing the grant. The purpose statement should be meaningful.

Outline Anticipated Deliverables in Alignment with Needs

While the applicant is preparing to write the grant, it should outline what it wants to accomplish if funded. Focus on the needs of the applicant's particular topic and draft explanations of how the funded project(s) can address these needs with demonstrable deliverables. The applicant will have time to develop specific goals and objectives when it is actually writing the grant proposal so use this time to organize thoughts and hopes for what the applicant wants to accomplish if funded.

Know the Agenda of the Funder

During the grant preparation, it is also important to take the time to educate oneself on the focus of the federal funding agency. What are their priorities for this specific topic area? Read about national concerns in the topic area and learn about emerging issues. Knowing where the federal funding agency is and where they are headed can provide insight when writing the proposal and help the applicant to align purpose. Examine previous or current projects that may be similar in nature.

Follow the Instructions Exactly

Develop a Checklist

It is important to thoroughly read the federal grant proposal instructions and make an instruction list to check off before the applicant submits the proposal. The federal funding agency will give explicit directions. If the applicant does not follow the instructions, the proposal may be rejected. Do not provide unnecessary items that are not mentioned or listed. Provide all the information that is requested in the exact format that is required, including basic but often overlooked items, such as formatting, font, font size, margins and attachments.

Funders will assume that if the applicant cannot follow directions when submitting a proposal, the applicant will not be able to follow directions when needing to submit reports and follow through with the implementation of the proposal. A template checklist can be found in the Appendix of this manual.

Register for a D-U-N-S Number

The applicant should register for a Dun & Bradstreet (D&B) number as early as possible. D&B provides a D-U-N-S Number, a unique nine digit identification number, for each physical location of a business. D-U-N-S Number assignment is free for all businesses and is required to register with the US federal government for contracts or grants. This number is an identifier for the applicant that is required in advance in order to submit the grant. Also note that if the applicant has two separate locations, each of which apply for federal grants with separate mailing addresses, the applicant will need two different D-U-N-S Numbers. If the applicant calls in by phone, the D-U-N-S Number should be received that day. If the applicant applies over the Internet, it may take up to 30 days to receive the number. For more information, visit: http://fedgov.dnb.com/webform.

Use a Framework to Measure and Monitor Grant Adherence

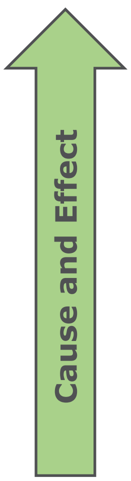
An applicant wants the funder to understand how qualified and dedicated it is towards accomplishing the goal and objectives noted in the grant application. Funders will not know this information unless it is specifically illustrated. An excellent tool for demonstrating that logical link between what activities will be done to achieve the desired goal is through the use of a framework. A framework is a planning tool that links activities to the goal of the grant which enables monitoring of progress and identifies opportunities for improvement. Adopting a framework to manage performance aligns people to an applicant's mission, strategy and processes, and influences financial measures. The following are descriptions of various frameworks that have proven successful amongst organizations in various industries and locations. Each framework can be used independently or in combination to fit the unique challenges and culture of the applicant.

Balanced Scorecard

"Don't drive your organization by looking through the rearview mirror" is one saying often heard from Balanced Scorecard enthusiasts as they transformed their measuring and monitoring from looking at past performance to looking at current and future performance. This is accomplished by translating the organization's mission into four equal perspectives of performance and strategy: learning and growth; internal processes; customers and community; and, financial goals.

Balanced Scorecard is a way of expressing and measuring strategy, linking operations to that strategy and monitoring and comparing performance. The foundation of the Balanced Scorecard instills a culture of learning and growth in employees, which emphasizes individual value and guides employees to identify their unique role in serving the organization's mission. This, in turn, can improve performance, productivity and culture. The internal processes perspective drives operational tasks focused on the organization's mission and strategy and has the potential to minimize the current workload by only focusing on essential mission-driven tasks. The customers and community perspective steers strategy to meet the demands of the environment so the organization can maneuver obstacles preemptively instead of reactively. Developing financial goals that are aligned with the organization's mission and strategy propels an organization to achieve financial success and sustainability. Outlining strategies within each of the perspectives assists staff in identifying their personal roles in serving the organization's mission and prioritizes staff as the organization's largest asset, which in turn can result in multiple benefits. Grant funders want to see alignment in how staff is directly implementing activities to fulfill the goal of the project or mission of the applicant. This framework also enhances the applicant's ability to measure and monitor success which ultimately leads to long term sustainability. For more information on implementing a Balanced Scorecard initiative, please visit: http://www.ruralcenter.org/sites/default/files/Flex%20Program%20Evaluation%20Toolkit_0.pdf.

Balanced Scorecard Components

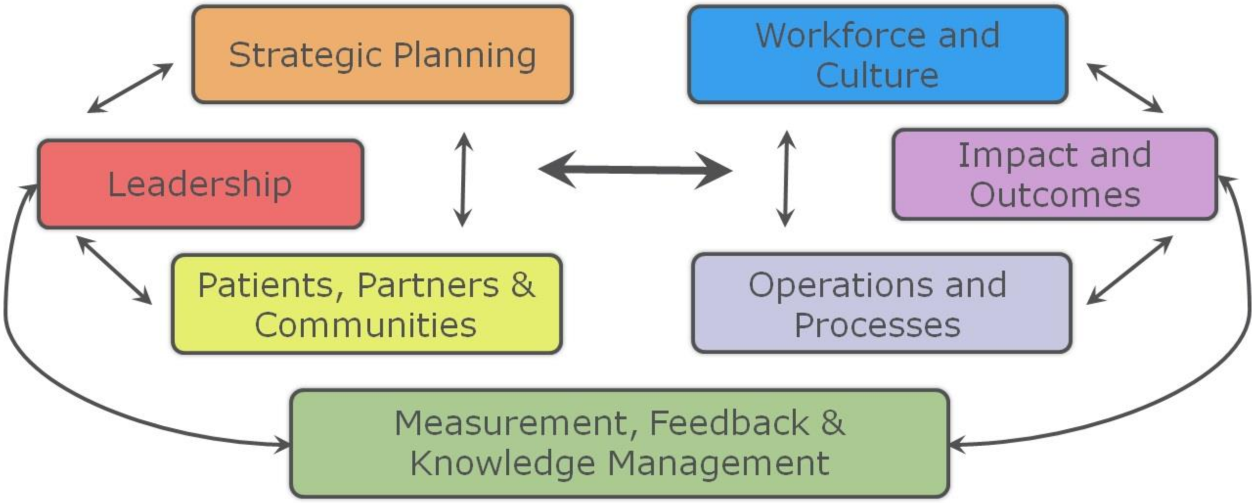


Perspective	Key Question
Financial The driver of stakeholder value	To succeed financially, how should we appear to our stakeholders?
Customers and Community The differentiating value proposition	To achieve our vision, how should we appear to our customers/community?
Internal Processes How value is created and sustained	To satisfy our customers and stakeholders, what business processes must we excel at?
Learning and Growth Role for intangible assets – people, systems, climate and culture	To achieve our vision, how will we sustain our ability to change and improve?

Baldrige

"Looking at the whole picture, not just the pieces" is the concept behind the Baldrige Performance Excellence framework. Baldrige provides a comprehensive systems approach to sustainable quality excellence by building leadership skills that align thinking and strategies in the following components of management: leadership; strategic planning; customers and community; measurement, feedback and knowledge management; workforce and culture; operational processes; and, outcomes and impact. Each component is interconnected and plays a role in the organizational environment. When the above components are prioritized and aligned by skilled leadership, an applicant optimizes their likelihood for success as service gaps are minimized and communication linkages are enhanced, thereby assuring that the goal of the grant is being accomplished. For more information on building performance excellence in grant proposals, please visit: http://www.nist.gov/baldrige/.

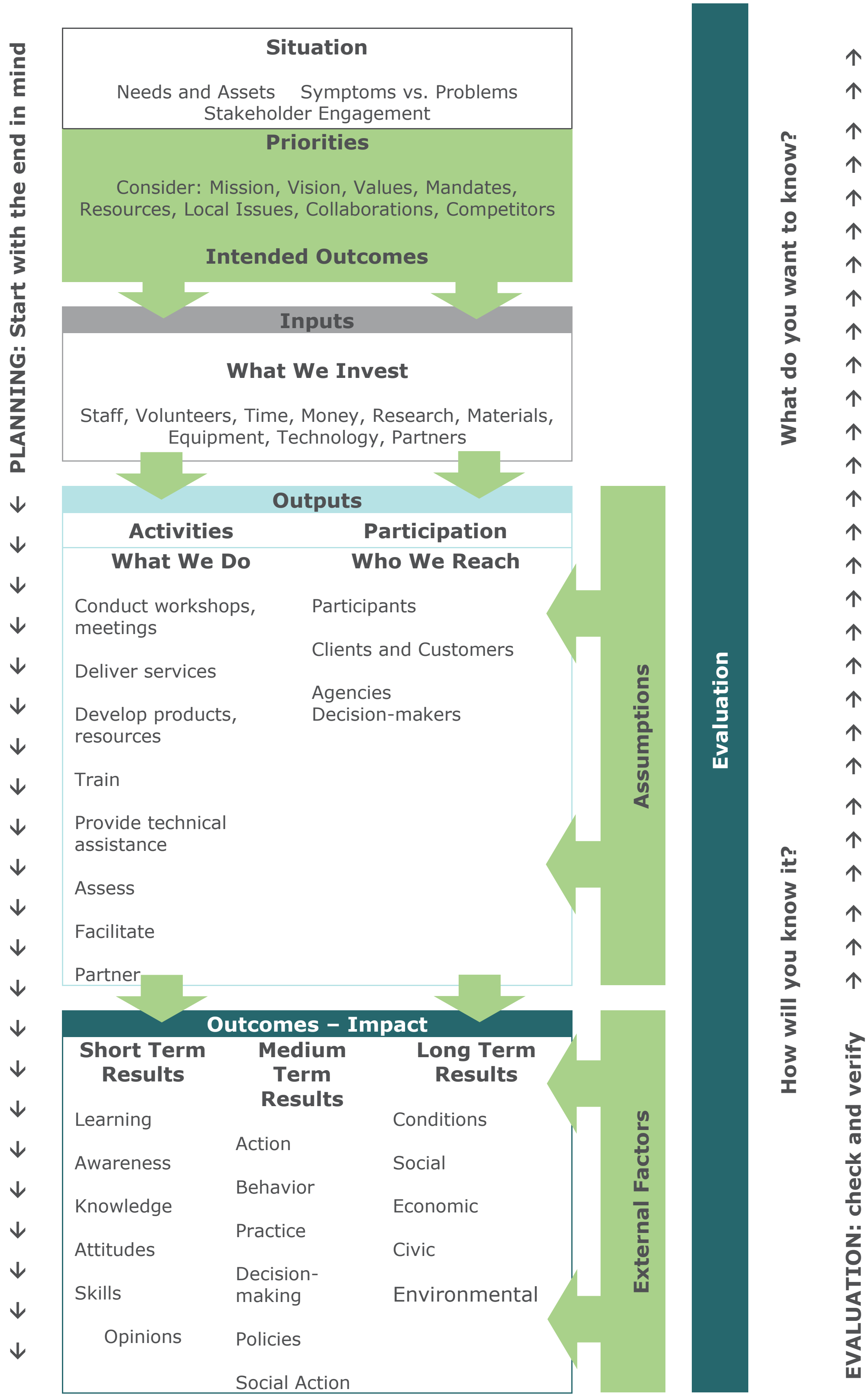
Baldrige Performance Excellence Framework Categories



Logic Model

A logic model can be used to describe how a grant project should work by presenting the planned activities focusing on anticipated outcomes in a sequence of "if-then" statements. Example: "*If* the organization hosts an educational conference on health care policy, *then* the target audience will be informed of new health care changes." The flow of the logic model maps out how an applicant's planned work aligns with the intended results. The applicant's inputs (human, financial, organizational and community resources contributed to the grant) and activities (work that is accomplished by the applicant through processes, events, technology, etc.) creates an effect through outputs (tangible products or deliverables from completing activities), short-term outcomes (results of grant activities and operations within 1-3 years) and long-term outcomes (results of grant activities and operations beyond 3 years). For more information on the logic model, please visit: http://www.ruralcenter.org/sites/default/files/Flex%20Program%20Evaluation%20Toolkit_0.pdf.

Logic Model Diagram



Each grant management framework provides applicants with a tool to translate the grant's mission, vision and strategies with continued monitoring while focusing upon outcomes and impact – the bottom line of the grant. The frameworks also communicate the strategic direction of the proposed grant to the staff, boards of directors, grant evaluators and grant funders.

SECTION 2: WRITING THE GRANT

Dos and Don'ts of Grant Writing

DO

- Know the focus/subject matter of the federal funding agency
- Follow the instructions exactly
- Use the terminology of the funding source to show that the applicant understands the intentions of the funding source and for consistency for the reviewers
- Write succinctly. Say what needs to be said and nothing more. Write clearly and concisely
- Use a logical format with headings so that reviewers do not need to flip back and forth
- Talk more about solutions than problems. Show that familiarity with the issues but focus on what the applicant is going to do about it
- Triple-check the math on the budget. Math errors undermine credibility
- Revise over and over again
- Ask a colleague to review one of the last drafts. Ask them to be very critical and to provide as much constructive feedback as possible. Offer them a scoring sheet based on the grant requirements to follow
- Focus on outcomes or deliverables, what the grant is hoping to produce and/or achieve

DO NOT

- Assume the funder knows the applicant and the impact the applicant has had in the grant topic area
- Address a specific need with a general solution. The applicant should provide a clear picture of what it will do so address the issue
- Use acronyms without first introducing them
- Use jargon
- Pad the budget

Telling the Applicant’s Story

Establish Credibility

This is the section where the applicant can establish credibility. Write as though the funder is hearing of the applicant for the first time. Include information on history, mission, clients, service area, programs and accomplishments. The applicant needs to prove that it can get the job done, evidenced by the positive impact it has had on a targeted population or topical matter in the past.

Provide Documentation

In order to showcase the applicant as competent, it is important to provide documentation. Documentation can include data with citations, quotes from experts (which can be local) and any other supportive information that seems appropriate. For the majority of important issues there will be at least a bit of data to site from professional journals or previous projects. If there is a lack of data because the issue is relatively new, the applicant may decide to conduct a needs assessment. Taking the time to conduct a needs assessment through surveys, secondary data collection, focus groups, key informant interviews or scientific research will benefit the proposal and provide the applicant with baseline data. The applicant should write effectively to show expertise as strongly as possible but do not promise more than there is capacity to complete. Remember, the funding source should want to partner with the applicant.

Providing the Right Amount of Information (the more is not the merrier)

By and large, it is much easier to write a long document than a short one. However, it makes a difference when time is taken to edit until the proposal so that it is clear, concise and every word is useful. Say what needs to be said and nothing more. Grant evaluators may not have specific knowledge about the issues, needs or involved organizations. Keep this in mind when writing and explain like as if talking to someone who is new to the concepts. However, remember to write succinctly; do not use jargon or acronyms unless they are first established and use the terminology of the funding organization.

Include clear and concise data elements. Applicants should ask themselves how the reviewers will perceive what the applicant might say and take the time to brainstorm strategy with the following questions in mind:

- What data from professional journals, previous projects or local experts will be most convincing to document need?
- How many goals are appropriate?
- How many objectives are appropriate?

Read, Read and Read Again

Follow the Instructions Exactly

The federal funding agency will provide directions for completion of the proposal. If the applicant does not follow the instructions of the federal grant proposal, the proposal may be rejected, even for something as minor as incorrect font size. Provide all the information that is requested in the exact format that is required, including basic but often overlooked items, such as formatting, font, font size, margins and attachments. Use the terms in the RFP, not the terms the applicant normally uses to reference the same thing. Though the applicant may believe it is providing helpful, anecdotal information regarding its position or experience, do not include extra or other attachments in an application that are not requested.

Funders will assume that if the applicant cannot follow directions when submitting a proposal, the applicant will not be able to follow directions when needing to submit reports and follow through with the implementation of the proposal.

Finish the Grant Early

The applicant should do itself a favor by finishing the grant writing early to enable a second and third review of the proposal once everything is complete. Multiple reviews may seem excessive, but it is surprising the number of errors, big or small, that are noted upon review. It is important to have someone else review the proposal prior to submitting as well. The reviewer(s) will often discover connections needed to tighten the proposal and ensure simple mistakes in grammar and spelling are caught.

Parts of a Proposal

There are nine fundamental categories that should be considered when designing a federal grant proposal. These categories are designed to assist applicants with identifying, addressing and resolving a substantiated need.

The following categories represent a generally accepted format for developing a thorough federal grant proposal:

1. Abstract
2. Statement of need
3. Goal(s)
4. Objectives
5. Work plan
6. Budget
7. Evaluation
8. Qualifications
9. Appendix

In the following section, each grant proposal category is explained, including effective and ineffective writing samples and helpful tips.

Abstract

The abstract is a summary of the grant proposal and highlights the most important statements from each section. This section is the most important for grant reviewers as they often refer back to the abstract when debating key attributes of the proposal application, simply out of ease. Use the abstract as the opportunity to lure the grant reviewer in to want to read more of the proposal. Every crucial point of the proposal should be found in an abbreviated form in the abstract. The abstract section should be no more than a half of a page or 2-3 paragraphs. It is advantageous to include the following:

- Briefly state the need for the grant and the competence of the applicant in addressing this need
- Indicate anticipated impact and goals of the project, including how they will meet anticipated needs
- Articulate the project objectives and feature key activities in the work plan
- Indicate the framework being used to share how the activities and objectives will meet the overall goal and monitor progress
- Briefly describe the total cost of the project and indicate how much will be contributed by the applicant, if applicable
- Define how the grant will be sustained and monitored for progress and impact over time by summarizing the evaluation model
- Identify how the results of the grant will be disseminated to key stakeholders
- Include key details – be as specific as possible, while striving for clarity

Constructing the abstract section of a grant proposal is good practice for expressing ideas with clarity, brevity and intrigue. A poorly written abstract excludes any of the above bulleted points or does not indicate the cause, the activities and the effect the grant funding will have on meeting the identified need.

Helpful Tip: Prepare the abstract section last in the grant writing timeline to truly capture the special details the applicant would like grant reviewers to remember in attempts of setting the application apart from others.

Statement of Need

Correctly identifying and articulating a need is crucial towards the success of the applicant's plan. Simply stated it is the reason behind the proposal. Taking the time to conduct a needs assessment through surveys, secondary data collection, focus groups, key informant interviews or scientific research will benefit the proposal and provide baseline data. There are many state and federal sources available to provide supporting data. Please reference the Appendix for a list of the most common resources utilized in writing federal grant proposals for multiple settings. Once the applicant has compiled all of its quantitative data (objective information that can be measured) and qualitative data (subjective information that indicates expertise or emotion) into one place, review and ask the following questions:

- What words or phrases stand out as compelling?
- Which data points are the most clear? Which are new or profound?
- What data points are added information, but not impactful?
- Where is more supporting data needed?
- What images or pictures come to mind the data is reviewed?
- How has the identified need historically been addressed? What is currently being done to address this need?
- Who is the target population or audience that will benefit from addressing this need? Does the target population or audience view this need as a major concern?
- What challenges will have to be overcome to address this need?
- What strengths can be leveraged to address this need?
- How can the applicant manifest change in addressing this need?
- What will this change mean for the target population or audience?

Reviewing the data and methodically asking and re-asking the questions above will help the applicant determine the root cause of the need and how the applicant can best address this challenge. Articulating the root cause of the need cannot be reinforced strongly enough. A common error is presenting a need from the perspective of "our customers are lacking…" or "this need of our customers is missing…" When this perspective is presented it often results in circular reasoning and ends up with the ultimate goal of the grant having a 50% chance of success.

For example: "The need in this community is that it has no long term care facility". The circular reasoning then dictates, "Did the grant provide the community with a long term care facility-- Yes or no?" Nowhere in this statement are the people mentioned. The reader does not even know if there are any individuals that would require, want or benefit from long term care facility services in the community. Therefore, the need is not that there is no long term care facility. By examining the root cause, it is identified that the need is that there is a high percentage of the population requiring skilled nursing care in the community that has no means of accessing this type of service locally.

As the applicant prepares this information, consider noting how the target population or audience is currently coping with the need the applicant plans to address through this grant and how the applicant can resolve or alleviate the need. Be sure to use data, statistics and quotes from subject matter experts or testimonials from the target population to justify the case. Begin writing the statement of need with a compelling and attention-grabbing sentence to entice the grant reviewer into reading more of the proposal. Try to pull on the heart strings of the reviewer (but not overdramatically). The goal is to connect the reviewer to the challenges the target population or audience endures with a case grounded in documented data from reliable sources.

Going through the process of determining the root cause seems laborious, but it will save the applicant time and effort when writing the rest of the proposal and operationalizing the proposal once the grant is awarded. Throughout the applicant's writing, be sure to meet these basic requirements in the statement of needs section:

- Identifying a need that clearly relates to the mission of the applicant
- Providing evidence drawn from data by subject matter experts in the field and/or testimonies from individuals knowledgeable about the matter
- Citing data from reputable local, state and national organizations
- Addressing a need that is reasonable and realistic to accomplish over the course of a grant
- Describing the need of the target population or audience, not of the applicant

Helpful Tip: Conclude the statement of need paragraph by defining how the proposed project will address the documented needs.

Linking Needs to Goals and Activities

Any proposed grant activities, including new activities, should include an explanation of how the activities continue to support attainment of the objective and goal while meeting an identified need. Be sure to include a timeline. For longer proposals and multi-year grants, the timeline needs to include planning and assessment stages in addition to implementation.

Goal

A goal statement reflects the "big picture" regarding the long-term outcome of the grant proposal. The value of the goal statement is to provide grant reviewers with one concise statement about the overall purpose of the proposed project and offers context into the rest of the proposal. The goal statement is akin to that of an organization's mission. The key to writing a successful grant application is simplicity with a clear purpose, or goal. When grant reviewers read and debate the application, the applicant will want them to clearly understand what makes the project unique and achievable.

Helpful Tip: Remember: Activities should relate directly to the program goals and objectives, as well as to the project description. Activities should also:

- Be clearly stated
- Address the identified needs of the targeted population or audience
- Be sufficient to carry out the proposed program
- Be designed to provide measurable outcomes

Many grant reviewers encourage the use of SMART goals. SMART is an acronym to use as a guide when developing goal statements and stands for Simple, Measureable, Attainable, Results-oriented and Time-limited. Reviewers will be looking to see if the applicant took the time to answer the questions below when developing goal statements and following the SMART goals guide can assist.

Simple

Measureable

Attainable

Results-oriented

Time-limited

A SMART goal answers the following questions:

- Is the statement simple to understand?
- Who has the need? (target population or audience)
- What is the need? (evidenced from the statement of needs section)
- How can it be determined if the intervention made a difference?
- How can outcomes be measured toward achieving the goal?
- What can be done to address this need?
- Can the applicant overcome the challenges associated with this need?
- Is the goal attainable?
- Does the applicant have the resources (knowledge, skill-set, infrastructure, community support) to address the need?
- What will be the results?
- Is it realistic for the applicant to address the need within the amount of time and parameters the grant funders have set?

Answering the questions above will help the applicant develop its goal statement, but the applicant does not need to summarize or include all answers to the questions above in the goal statement. Remember: the first item in a SMART goal is keeping it simple.

Helpful Tip: It is a common mistake to draft a paragraph or develop multiple sentences describing the purpose or goal of the project. Avoid doing this at all cost. Effective grant proposals summarize the goal, or goals, into one sentence that describes the foundational purpose for addressing the primary need within the target population or audience.

Adhere to these tips when developing the goal statement:

- In only one statement, describe the purpose of the grant application
- Describe the primary need from the target population or audience's perspective
- Identify the geographic area this grant will serve (if applicable)
- Indicate the timeline

Helpful Tip: Limiting a grant proposal to one large goal is helpful for simplicity. A common error in drafting a goal statement is not making the goal action-oriented.

Helpful Tip: Begin a goal statement with the word "To"; which implies that an action is going to occur. Here is an example of an effective goal statement:

To improve access to behavioral health services for 80% of individuals enrolled in the Tri-County Wellness Program in the upper peninsula of Michigan within 5 years.

This statement begins with "To" so it is action-oriented. It provides the purpose - "improve access to health care services". It identifies for whom - "individuals 200% below the poverty line" and where - "in the upper peninsula of Michigan". The statement also notes the time frame – "within 5 years".

Importantly, the goal statement is simple.

Objectives

Objectives are reflections of the goal statement and signals to the reviewer what a proposal intends to accomplish. Objectives can be referred to as the "heart" of the proposal. There are three types of objective statements:

1. Process objective - contributes towards a behavior change, but does not create change. A common example of a process objective is to indicate that a certain number of meetings will be held. Process objectives are perceived as weak by grant reviewers because they do not relate to outcomes and impact. In this example, just because a meeting occurred does not mean participants learned anything or will have a change in behavior in addressing the identified need.
2. Product objective - identifies a tangible product, such as a report, newsletter, video, etc. created for the purpose of addressing the identified need. If the applicant is using a logic model framework, the process and product objectives fit nicely as outputs.

3. Performance objective - indicates a behavior change as an outcome and specifies a level of performance. This is the most desired type of objective statement to write as perceived by grant reviewers. A practical example of this type of objective describes how the target population or audience will demonstrate their comprehension or mastery of a skill that addresses the statement of need, perhaps through completing a test or meeting satisfactory behaviors observed by a trainer or supervisor. Performance objectives can lead to short-, intermediate- or long-term outcomes.

Performance objective statements are likely the most relevant and effective with federal grant writing as they demonstrate outcome of activities toward meeting the goal. Three main characteristics of effective performance objective statements include the following:

- Indicate a time in history to inform funders when to expect a deadline for each accomplishment proposed. For example: By January 2015…
- Reflect a change in behavior or accomplishment by the target population or audience, not the applicant. For example: nurses who attend the safety training will…
- Signify how the change in the target population or audience's behavior will be measured or tested. For example: …score 80% or better on the Safety Aptitude Test

Helpful Tip: Here is an example statement for a performance objective:

By _______ (specify time), participating (or other action word) _____________ (describe the target population) will ____________ (indicate the behavioral accomplishment).

SMART objectives also apply. Referring back to the SMART goal statement process, be sure to indicate only simple, measurable, attainable, results-oriented and time-limited objectives to meet the goal statement. Identifying approximately 3-6 objectives in the grant to meet the primary goal is reasonable. Too many objectives lead to a grant that is not only too complex for a grant reviewer to track the logic, but also too complex for the applicant to adhere to.

The following indicates the common mistakes when writing objective statements. Avoid these:

- The objective is not aligned with the goal(s) of the grant proposal
- More than one statement is written for an objective statement
- No time is indicated when the accomplishment will occur

- The objective is not centered on the target population or audience's perspective
- The objective is not clearly measurable

Work Plan

Whereas the goal and the objectives indicate *what* the grant will accomplish, the work plan explains *how* the grant will be accomplished.

The work plan section of a grant proposal explains the steps taken by the applicant, not the target population or audience, to accomplish the objectives outlined to meet the goal. To do this, the applicant must identify activities that it will accomplish. An activity specifies what the applicant will do to address the goal and objectives. Activities take the objective statement and describe how it will be accomplished. An example of an activity might be to develop a training curriculum on safety measures for nurses or contract with another agency for additional expertise.

Constructing a concise work plan that is easy to read in a table format is advantageous. This table format allows the applicant to explain how the proposed goal and objectives will be met by defining what activities will occur, how much it will cost the applicant to engage in the activities, how the activities will be measured, and what the outcomes of the activities will be. The work plan is important as it helps grant reviewers comprehend the applicant's logic in how it is going to effectively spend grant funds to meet need. The table format is also helpful for preparing the applicant for following through on executing, monitoring and measuring performance upon award of the grant. In addition to the table format, it is typical for federal RFPs to request a work plan narrative of how the applicant will accomplish the goal and objectives, which essentially describes the applicant's processes in a paragraph form and greater detail.

The following work plan is a typical table format requested by federal organizations. However, work plan formats will change or vary based on the funders' request. Some RFPs will include a template to follow, others may not. It is critical to include only the components the grant language asks for in the work plan section.

Example Work Plan

Goal:						
Objective:						
Inputs	**Activities**	**Budget**	**Time Line**	**Outputs/ Process Measures**	**Outcome Measures**	
					Short-Term Outcomes	Long-Term Outcomes

A template work plan can be found in the Appendix of this manual.

Helpful Tip: A common mistake when drafting a work plan is to confuse activities with objectives. The key point is to remember that objectives are written to explain what the target population or audience will accomplish and activities are written to explain how the applicant will accomplish the objective.

Connect the Narrative to the Work Plan

Be sure that the narrative is connected specifically to the work plan. The work plan lays out specifically what activities will be done, when they will be done and who is responsible for the activity. The work plan also demonstrates outputs, outcomes and impact of activities and objectives. The narrative outlines the activities in more detail than what is described in the work plan. It draws the relationship between needs, activities, objectives and goals. The work plan should be thought of as a companion document to the work plan narrative that succinctly lays out the intended work, while the narrative has further detail and justification. The information presented in the work plan and work plan narrative must clearly demonstrate the progress of the goals, objective, activities, measureable outcomes and impact. Objectives designed for completion over more than one year will need to define incremental activities including the measurement strategy and intermittent targets reflective of the activities to be executed in addressing the objectives and goal.

Budget

Budgets may be challenging, but the completeness of this section is critical. The categories expenses may fall into for the RFP may be different than how the applicant normally categorizes expenses. Be careful to use the same language the RFP indicates when outlining the budget so grant reviewers know that the applicant is speaking their language. If the applicant does not understand the budget form, be sure to contact the designated person at the funding organization.

As with the rest of the proposal, the budget section must be done precisely by following the directions. This section is where the applicant indicates how much the project will cost and provides an explanation of each expense. Everything that is requested in the budget should clearly be explained through activities. There should not be anything new to the reviewer when they get to the budget section.

All budget tables should be developed using a table format that lists the budget item, delineating the expenses that are incurred by the applicant to complete the grant activities. The total is the complete amount of funding needed to complete the project. The amount provided/in-kind is the amount of financial contributions made by the applicant, demonstrating the degree of "buy-in" or the level of importance/value the applicant is willing to contribute to address the goal of the grant. Similarly, some federal grant RFPs may require a specific dollar amount or percentage of the total cost of the grant be provided by the organization to assist in accomplishing the grant, which is termed as matching funds. The amount requested is how much money the applicant is requesting from the grant funders.

Example Budget Table

Budget Item	Total	Amount Provided/ In-kind	Amount Requested
Salaries and wages	$	$	$
Travel	$	$	$
Training	$	$	$
Educational materials	$	$	$
Advertising	$	$	$
Room rental	$	$	$
Telephone	$	$	$
Total	**$**	**$**	**$**

A template budget table can be found in the Appendix of this manual.

Check and re-check the RFP instructions to be sure budget detail is followed precisely as there may be limits on how much money an organization can allocate for salary, equipment, travel, marketing or other areas. A budget that spends more than the allowable costs in a specific category could result in the entire grant being tossed or the applicant needing to re-submit the entire budget. It is also recommended to think about all of the costs the applicant incurs on a daily basis as every service has a value (heat, utilities and internet, copy machine rental, etc.). These indirect expenses can add up quickly if they are not calculated into the budget correctly. For instance, if an existing computer is in use 4 hours a day for a project, then 4 hours of use can be documented as an in-kind match. Calculating the indirect expenses is a common area for mistakes as most federal RFPs require that each budget item be directly linked to the grant project. Budget requests that do not have a solid legitimacy reduce the chance of funding.

If budget estimates are low, the applicant will be responsible for finding the missing money to complete the project. If budget estimates are high, the applicant will need to report excess money to the funder, potentially have to give money back or develop additional activities that prudently and wisely spend the excess funds on a shortened timeline. Inflating expenses is also an error and could be perceived as deceitful or stealing. If the grant includes multiple years, it is acceptable to add a standard rate of inflation (~2% increase) to the budget for future years.

Helpful Tip: Another common mistake is that costs are estimated. Grant reviewers expect to see exact costs.

A budget narrative should follow the budget table. A budget narrative explains in detail how the costs in each budget item are calculated. For instance, if there is a total cost of $25,000 for salaries and wages indicated in the budget table, the budget narrative should define how this amount was calculated, as demonstrated below.

Salary and wages were calculated as follows:

1) The cost of 1 full-time equivalent (FTE) program coordinator is $5,000 (including benefits) per month x 4 months = $20,000

2) The cost of 1 FTE administrative assistant is $1,250 (including benefits) per month x 4 months = $5,000.

Thus, the total cost for salaries and wages is $25,000 ($20,000 + $5,000).

Each budget item should be described in this manner in the budget narrative. As the applicant prepares the budget, keep the following recommendations in mind:

- If staff are working on multiple grants, the total full-time equivalent (FTE) can only equal 1.0 across all grants
- Make certain that all figures are 100% accurate and that all numbers add to the total number requested
- Explain how every dollar will be spent; do not leave any room for guessing
- Specify direct costs which are the expenses for which the requested grant funding will be used. These could include personnel, fringe benefits, travel, equipment and supplies
- State all indirect costs and overhead associated with administrative expenses

Consult with the federal grants management department or Project Officer to clarify any questionable budget items when preparing for the grant.

Evaluation
Designing and implementing an evaluation model as the applicant develops the grant proposal is necessary. An evaluation model organizes the outcomes and impact as well as ascertains gaps in how the applicant accomplished what it said it would do in the grant proposal. Implementing an evaluation structure before a grant even begins is advantageous as it prepares all parties involved in the grant with defined expectations for success and identifies opportunities to make adjustments to grant operations as needed before grant submission (tweaking the objective statements or activities if need be). A major benefit for designing the evaluation model at the forefront of the grant is to prevent the “would have, should have, could have” syndrome of looking back in hindsight towards the grant. Evaluating one’s works empowers the applicant by providing an opportunity to fix broken processes and revise operations prior to the completion of all grant tasks. In addition, it enables the applicant to consider contingency plans if activities do not work out as designed or anticipated.

Helpful Tip: A successful evaluation model tests the objectives section of the proposal.

If the objective statements are measurable, evaluation will be adequate. Conversely, if objective statements are constructed without considering the SMART goal, then the evaluation will not be valuable to the applicant or the funder in demonstrating outcomes and accomplishing the grant goal. Many federal grants request grantees submit an evaluation plan that utilizes a framework, such as the logic model, Balanced Scorecard, or Baldrige framework as these tools outline the outputs measures and short-term and long-term outcome measures while employing a comprehensive and systematic approach.

It is likely that individual objectives or activities will require their own evaluation, all tying back to the overall project evaluation. If the objective section states that the target population will score at least 80% on a safety aptitude test, the evaluation section explains what test will be used, where the test will occur, who will administer and score the test and how many people took the test. Evaluations will also be looking to document how the safety test minimized risky behaviors or actions and will include quantitative and qualitative data to report this information.

To construct an evaluation model consider the following:

- Will the applicant’s staff perform the evaluation? If so, can staff be objective enough? Is staff time available to evaluate the grant?
- Will an outside organization perform the evaluation? If so, what will it cost? Will the organization add credibility to the grant application? Will the

evaluator be aligned with the mission of the grant? Will the evaluator be objective enough?
- Who are the stakeholders the evaluation should report results to? What sort of information would they like to see?
- Is there a framework or system that is a good fit for the applicant to use to develop the evaluation and monitor grant progress and outcomes?

A comprehensive evaluation toolkit has been developed and includes specific information designed for rural health organizations. This toolkit can be found at: http://www.ruralcenter.org/tasc/resources/flex-program-evaluation-toolkit

Qualifications

In this section of the grant proposal, the applicant will document that it has the capability to successfully accomplish the goal and objectives of the grant. It is possible that the grant reviewers may not know about the applicant or its staff. In this section of the proposal, the applicant should taut its proven track record if it is an existing organization by outlining how many years it has been in existence and summarize notable accomplishments and contributions to topic area of the grant. If key personnel have a distinguished degree or certification, note this to highlight areas of expertise or advanced understanding. Include staff bios or resumes to justify the skill set that will be utilized for the grant. Applicants that do not have a proven track record or are just forming could seek out collaborations or partnerships and include those that have a positive reputation to add clout.

When writing this section of the grant, the applicant should not hesitate to showcase its success. However, keep the description of accomplishments aligned with the activities and skill sets required to meet the goals of the proposed grant. Consider some of the following questions when drafting the qualifications section:

- How many years has the applicant existed?
- How is the applicant's mission aligned with the grant project in the RFP?
- What awards has the applicant or its staff received demonstrating competency or expertise?

Signifying how competent, talented and fantastic the applicant is to the funder is helpful; however do not be gluttonous or overzealous. If there is too much information gushing about the applicant or specific staff, the grant reviewer will typically just scan the page and not read the extraordinary level of details.

Appendix

Provide documentation to the sources cited in the statement of need section in the appendix. If an activity outlined in the work plan includes a description of a new product, service or sub-contractor that a reviewer may not know about, consider adding a brochure or a description of the item in the appendix. However, keep the number of appendix attachments to a minimum as many grant reviewers will find the additional papers an annoyance to read through. Some federal RFPs may also require specific attachments, so be careful to read the instructions thoroughly and include only any needed or requested information.

SECTION 3: SUSTAINING THE GRANT

Reporting

Creating Progress Reports and Identifying Outcomes

Once the applicant is awarded the grant, they are termed a grantee. Federal grants request progress reports at varying intervals from grantees, all of which will be specified by the grant or the Notice of Award (NoA). Some request quarterly progress reports, others bi-annual or annual. Most request a report at the end of the entire grant project period, be it one year or five. A progress report can have similar components as the original proposal: performance narrative, current work plan and evaluation plan. It also includes other important pieces such as: position descriptions for all new positions supported fully or partially by the grant, resumes for any staff hired since submission of the most recent application, future work plan and accompanying future work plan narrative.

In the current year's work plan narrative, be sure to describe progress on all activities since submission of the last application. Describe all activities to be conducted for the remainder of the current budget year and discuss any challenges faced or anticipated in the remainder of the year as well as any lessons learned. The information presented must clearly demonstrate the progress of the goals, objective, activities, measureable outcomes and impact. Information described in the work plan narrative should align with the information displayed in the current work plan. The work plan is used to demonstrate outputs and outcomes of activities and objectives to attain goals, but does not include a narrative description.

Similarly, the future work plan narrative provides a narrative explanation of the future work plan strategy, addressing each activity, objective and goal. Be sure to include expected challenges, intended outcomes and anticipated impact. Continuation of ongoing activities and any new activities should include an explanation of how the activity continues to support attainment of an objective and goal while meeting an identified need. In the future work plan narrative, the grantee should be sure to discuss how it will mitigate risk of not attaining intended goals and outcomes.

Capturing Reporting Requirements

It is likely that the federal grant will have specific, measureable reporting requirements for the grantee to capture and submit. The grantee may need to submit many measureable outcomes in the progress report. The grantee may also have a subset of reporting requirements that need to be submitted via alternate means to roll up for national demonstration of outcomes and program impact. As an example, if the grantee is applying for a Health Resources and Services Administration (HRSA) grant, the grantee will likely submit some, if not all, of these measureable reporting requirements through an online electronic system called the Performance Improvement Measurement System (PIMS) in HRSA's Electronic Handbooks (EHB) available at: https://grants3.hrsa.gov/2010/WebEPSExternal/Interface/common/accesscontrol/login.aspx. The grantee will likely be provided a window of time in which to login and upload program specific performance measures for submission.

How should the grantee track these data requirements as it conducts the grant activities? Here are a few suggestions:

- Be sure that the work plan is continuously up to date. Review it at least quarterly and be sure that the required report measures are documented and updated on the work plan
- Build a tracking tool. This can be as simple as a Microsoft Excel spreadsheet. Many grantees choose to separate out PIMS measures from other measures that will be reported on, just to keep them straight. This can be a useful method, but be careful not to create too much redundant work. Is there a way to highlight or notate PIMS measures in the work plan as the grantee tracks all the other outcomes measures as well?
- Purchase or create an electronic data management system. Platforms to consider include Microsoft Access, project management software, or web-based tools for storing and managing content

Helpful Tip: Keep measurement tracking up to date. Waiting six months to update may be cumbersome, and waiting a full year could be downright overwhelming. Keep up with record keeping. It is all part of effective project management and good program evaluation.

How to Communicate Changes in the Work Plan or Goals

Requests for changes in scope or budgeting of the project should not be submitted in a progress report. If such changes are believed necessary, the grantee must submit a request for prior approval from the federal Grants Management Officer as specified by the federal Project Officer and as noted in the NoA. The progress report is not the place to request such changes. Be prepared to justify why a change is requested and remember to always relate it back to meeting the needs, attaining goals and staying on target in the scope of the grant. Be specific and come to the discussion with a plan in mind.

Sustaining Activities Beyond One Program Year

Objectives and related activities designed for a single budget year should fully develop their measurement strategy and present it clearly in the work plan, narrative and anticipated outcomes. Objectives designed for completion over more than one year will need to define incremental activities including measurement strategy and intermittent targets reflective of the activities to be executed in addressing the objectives and goal. If the grant is a multi-year award, it is critical that the grantee builds the activities upon each other to achieve the desired objectives and goal. Multi-year grants with fragmented objectives and activities, or only short-term projects (one year or less), are piecemeal and are not favored by reviewers.

> ***Helpful Tip:*** A systematic, strategic approach building on achieved outcomes, best practices and lessons learned of objectives will demonstrate a well thought out plan and a favorable path of grant deliverable execution.

Sustainability refers to the continuation of a grant's goals and efforts to achieve desired outcomes. Although many grantees think that guaranteeing the sustainability of a project means finding the resources to continue it "as is" beyond the grant period, ensuring sustainability really means making sure that the goals of the project continue to be met through activities that are consistent with the current conditions and resources that are available.

Some federal grants require sustainability plans as a contingent of award. Even if not required, it is good practice to think about sustainability of the grant program beyond one year of activities, or even the life of the grant if it is a multiple year award. Where will the grantee find funding beyond the grant? What happens when the resources are expended? A sustainability plan, developed early in the life of the grant, will keep the grant program ahead of the curve. Any new or expanded grant program becomes an obligation to the grantee. The best sustainability planning, particularly for a large grant, is incorporated into the overall organizational plan.

Multiple options exist for developing sustainability funding:

- If the grantee's organization(s) is large enough, it may be able absorb the future funding responsibilities of the grant program activities
- Alignment of grant program activities with some of the grantee's currently existing programs
- Development of fee-for service activities related to some of the grant program activities. (Note: it is important to initiate fee schedules before the grant funding expires. If the grantee is working on a three-year grant, begin development of fee-for-service activities in the second year based on program outcomes and needs identified in year one)

- Reimbursement methods with third parties (working with contractors)
- Fund raising

When noting to the grant funder the sustainability plans for the grant program, consider the following tips from the US Department of Labor:

1. Base decisions on data, to the extent possible
2. Specify target audience
3. Develop a detailed description of what services and activities are planned for sustainability
4. Identify what is needed to manage and operate the selected activities
5. Make current and potential partners and other stakeholders aware of sustainability planning activities
6. Find champions. Locate and encourage organizations and interest groups that benefit from the project's activities or who are interested in the target groups being served. These make the best allies

Helpful Tip: A sustainability plan, developed early in the life of the grant, will keep the grant program ahead of the curve. Here is a poor example of a sustainability statement:

To continue program operations beyond the grant, the project will make all attempts to seek funds from other sources that may be relative to the project.

Conversely, here is a good example that is much more specific:

To sustain activities in the present grant beyond the life of the grant period, the successful components of the grant activities will be developed into service lines targeted to rural providers seeking support in patient-centered medical home development. Future funding support may also be solicited from other relevant funders including community development grants, local university medical center partners, and health care-interested foundations targeting support to rural communities

Contingency Planning

Responding to Unmet Goals

The grantee has documented the grant outcomes and has found that it has not met the grant program goals. Now what? Well, this certainly relates back to creating a framework for supporting the grant and using effective program evaluation. Is it mid-course in the grant? Does the grantee have time and resources remaining to make adjustments? If so, focus on making these changes. Be sure to include the federal Project Officer in the discussion about what the grantee would like to do, before executing. If it is the end of the grant, a reflective evaluation of what happened is in order.

In both cases, determine why the grant outcomes are off course. Was the goal specific? Measureable? Attainable? Results-oriented? Time-limited? Was the target too high? Were some resources not available that the grantee originally intended on using (staff, equipment, training, consultants, contractors, etc.)? Was the target population or audience not ready for the project?

Do not be afraid of data that does not support the successful achievement of intended outcomes. Funders do not expect grant projects to end up perfectly as planned, but they do expect value for their money invested. Therefore, it is important to honestly report all findings, but then elaborate on the significance of the objectives that were met. For the objectives that were not met, the grantee can still emphasize the benefits of the project even though the level of achievement was not accomplished. Although not all circumstances are within the control of the grantee, perform a root cause analysis and make the solution part of the next planning process. This information will allow the grantee to change and improve the program and the activities. In addition, unmet outcomes can be a lesson in constructing reasonable objectives that are not overly optimistic. More information on root cause analysis can be found in the Flex Program Evaluation toolkit at: http://www.ruralcenter.org/sites/default/files/Flex%20Program%20Evaluation%20Toolkit_0.pdf

Preparing Alternative Plans

Sometimes, it is important to have a Plan B. Or at least a few thoughts about what Plan B, C or even D could look like. Effective, continuous monitoring and evaluation of grant progress will help the grantee to determine if Plan A, the work plan, is on course.

If not, think creatively. Gather other team members, co-workers, colleagues or stakeholders involved in brainstorming discussions. Have a contingency plan. What are the options? Where can resources be shifted or added? Again, it is important to report findings to the federal Project Officer and involve them in a discussion about what the grantee would like to do for Plan B, before executing. This is particularly important if it involves shifting funding among categories in the budget or removing resources from another planned activity.

APPENDIX

Additional Grant Writing Tips and Information

For 10 tips from HRSA on writing a strong grant application, please visit:
http://www.hrsa.gov/grants/apply/granttips.html

For information on managing non-competing grant continuation, please visit:
http://www.hrsa.gov/grants/manage/index.html
http://www.hrsa.gov/grants/noncompetingcontinuations/index.html

For requirements for Federal Funding Accountability and Transparency Act implementation, please visit: http://www.hrsa.gov/grants/ffata.html

For technical assistance resources from HRSA's Grants Management, please visit:
http://www.hrsa.gov/grants/manage/workshop.html

Consider becoming a HRSA grant reviewer. For more information, please visit:
http://www.hrsa.gov/grants/reviewers/index.html

Data Resources to Assist with the Statement of Needs

American Community Survey http://www.census.gov/acs/www/index.html

American FactFinder http://factfinder2.census.gov/faces/nav/jsf/pages/index.xhtml

Centers for Disease Control and Prevention Data and Statistics http://www.cdc.gov/DataStatistics/

Centers for Medicare and Medicaid: http://www.cms.gov/

County Health Rankings http://www.countyhealthrankings.org/

Department of Transportation http://www.dot.gov/research

Disability and Health System Data http://www.cdc.gov/ncbddd/disabilityandhealth/dhds.html

Economic Impact Analysis Tool http://www.raconline.org/econtool/about.php

Health Data and Profiles for State, Tribal, Local and Territorial Public Health Professionals Gateway http://www.cdc.gov/stltpublichealth/DataStatistics/index.html

Health Information Technology Data http://www.healthit.gov/policy-researchers-implementers

Healthy People 2010 Data http://www.cdc.gov/nchs/healthy_people/hp2010/DATA2010.htm

Health Professional Shortage Areas and Medically Underserved Areas http://hpsafind.hrsa.gov/

Long Term Care Data http://www.ahcancal.org/research_data/Pages/default.aspx

Medicare Hospital Compare http://www.medicare.gov/hospitalcompare/search.html?AspxAutoDetectCookieSupport=1

National Center for Health Statistics http://www.cdc.gov/nchs/

National Center for HIV/AIDS, Viral Hepatitis, STD and TB Prevention (NCHHSTP) Atlas http://www.cdc.gov/nchhstp/atlas/

National Vital Statistics http://www.cdc.gov/nchs/VitalStats.htm

Rural Health Economic Impact Assessments http://ruralhealthworks.org/impact/

Rural Health Research Gateway http://www.ruralhealthresearch.org/

State or Territorial Health Departments
http://www.cdc.gov/mmwr/international/relres.html

State Primary Care Associations
http://bphc.hrsa.gov/technicalassistance/partnerlinks/associations.html

State, Regional and Metropolitan Hospital Associations
http://www.aha.org/about/srmassoc/index.shtml

Statistical Data and Tabulation System (SETS) http://www.cdc.gov/nchs/sets.htm

The Annie E. Casey Foundation KIDS COUNT
http://www.aecf.org/MajorInitiatives/KIDSCOUNT.aspx

United States Bureau of Labor Statistics http://www.bls.gov/

United States Census Bureau https://www.census.gov/

Example Grant Writing Checklist

A word document version can be found at: https://ruralcenter.org/sites/default/files/Example%20Grant%20Writing%20Checklist_0.docx

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(recommended immediately)</td><td></td></tr>
<tr><td>Register for Electronic Handbook (EHB)</td><td></td><td></td><td>Aug 1
(recommended immediately)</td><td></td></tr>
<tr><td>Statement of Need</td><td></td><td>Sept 1
(recommended 3 weeks prior to full grant compilation)</td><td>Sept 8</td><td></td></tr>
<tr><td>Project Narrative, including:
- Goals & objectives
- Methodology
- Work plan narrative
- Work plan
- Sustainability plan
- Evaluation plan</td><td></td><td>Sept 1
(3 weeks)</td><td>Sept 8</td><td></td></tr>
<tr><td>Budget Table</td><td></td><td>Sept 1
(3 weeks)</td><td>Sept 8</td><td></td></tr>
<tr><td>Budget Narrative</td><td></td><td>Sept 1
(3 weeks)</td><td>Sept 8</td><td></td></tr>
<tr><td>Organization information, including:
- Qualifications</td><td></td><td>Sept 8
(recommended 2 weeks prior to full grant compilation)</td><td>Sept 15</td><td></td></tr>
<tr><td>Appendices, including:
- Staff plan and position descriptions
- Biographical sketches/resumes
- Letters of Support</td><td></td><td>Sept 8
(2 weeks)</td><td>Sept 15</td><td></td></tr>
<tr><td>Abstract</td><td></td><td>Sept 8
(2 weeks)</td><td>Sept 15</td><td></td></tr>
<tr><td>Grant Fully Compiled</td><td></td><td>Sept 22</td><td>Sept 24
(complete ahead of time to allow time for final review)</td><td></td></tr>
<tr><td>Submit to EHB</td><td></td><td></td><td>Sept 26
(submit ahead of final due date in case of processing errors)</td><td></td></tr>
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Example Work Plan

A word document version can be found at:
https://ruralcenter.org/sites/default/files/Example%20Work%20Plan_0.docx

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Example Budget Table

A word document version can be found at:
https://ruralcenter.org/sites/default/files/Example%20Budget%20Table.docx

Budget Item	Total	Amount Provided/ In-kind	Amount Requested
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Educational materials	$	$	$
Advertising	$	$	$
Room rental	$	$	$
Telephone	$	$	$
Total	**$**	**$**	**$**