

Drafting a Competitive Submission

Prepared for Temple University



AGENDA

- Preparation
- Crafting the Narrative
- Budgets
- Internal Temple policies
- Q&A

PREPARATION

Reviewing the RFP

First Steps

Should I Apply?

How Can I Refine My Project?



Recap - RFP/RFA/PROGRAM ANNOUNCEMENT

Key Elements

- Deadlines
- Eligibility
 - Type of Awardee
 - Geographic Limitations
- Funding Amount
- Project Period or Grant Term
- Program Goals / Metrics
- Submission Instructions
- Budget Stipulations
- Additional Resources
 - Grant manuals
 - Application packages
 - Links to online submission tools
 - Links to previous awards databases
 - References cited
 - Points of contact



Recap - FIRST STEPS

- Review all instructions and deadlines
- Review applicant criteria to ensure eligibility
- Identify the grantmaker's central goal(s)
- Clarify submission process and method

Develop...

- **Checklist** of all required proposal elements
- **Timeline** for proposal development
- **Narrative Outline** based on the scoring rubric or key section headings (may include character-, word-, or page-limits)



Recap - SHOULD I APPLY?

- Am I eligible?
- Do I have or can I conceive of a project that fits the parameters?
- Can I address all the required elements or bring in partners who can fill blanks?
- Do I have the bandwidth to develop a proposal under the deadline and implement the project?
- Would I be excited to execute the grant if I got the funding?
- Might the grant serve as a stepping stone to bigger/better grants in the future?



REFINING YOUR PROJECT

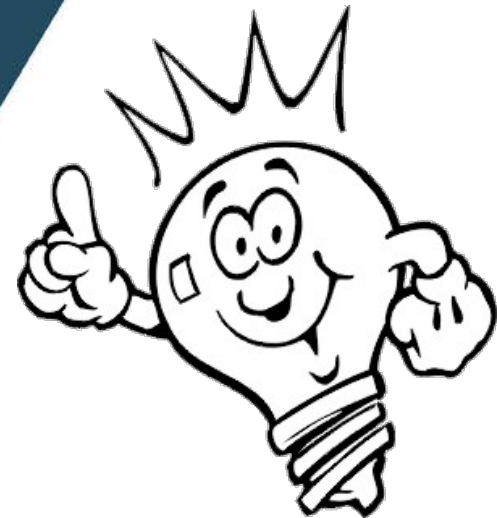
- Seek winning grant proposals
- Review abstracts of winning projects
- Read literature provided in the RFP
- Consider a collaborator, if appropriate
- Consult with a program officer, objective reader or Hanover Grants Consultant
- Consider interdisciplinary projects – think creatively! Expand funding opportunities through partnership and collaboration (i.e. science film project)



TIPS & SUGGESTIONS

- Start early! / Procrastinate later!
- Read all of the instructions
- Talk early with internal/external collaborators to clarify their roles and contributions
- Any confusion? Talk with the program officer
- Plan for Letters of Commitment/ Support and required MOUs and other signatures.
- Plan for internal Temple procedures!

Careful preparation will reduce time spent writing and rework.



TIPS & SUGGESTIONS

Template Narrative should align with Review Criteria.

Most funders have specialized requirements, but in lieu of specific direction:

- Executive Summary
 - Org/PI, Project Title, Amount, Term
- Organizational/Individual Background
- Rationale/Need/Problem
- Project Description
- Expected Outcomes
 - Alignment with Funder Aims
- Personnel/Management
 - Previous Similar Successful Projects
- Budget
- Conclusion
 - Sustainability

CRAFTING THE NARRATIVE

How Do I Write a Competitive Proposal?

What are SMART Objectives and Outcomes?

What Goes in My Budget and Budget Narrative?

Logic Model Primer

Project Timeline Options



WRITING A COMPELLING NARRATIVE

- Imagine that you already have the grant money
- Describe precisely how the money will be spent
 - Who
 - What
 - When
 - Where
 - Why
 - How
- Describe plan and activities in chronological order
- Use data and literature to support your plan
- Use tables for clarity and consolidation
- Use graphics and repetition for emphasis
- Show clear alignment with grantmaker goals
- Articulate expected impact of the project in concrete terms



S.M.A.R.T. FRAMEWORK



NON-S.M.A.R.T.

Objective:

Jog four times per week for ten weeks.

Outcome:

Complete the Boston Marathon in 2016.

S.M.A.R.T.

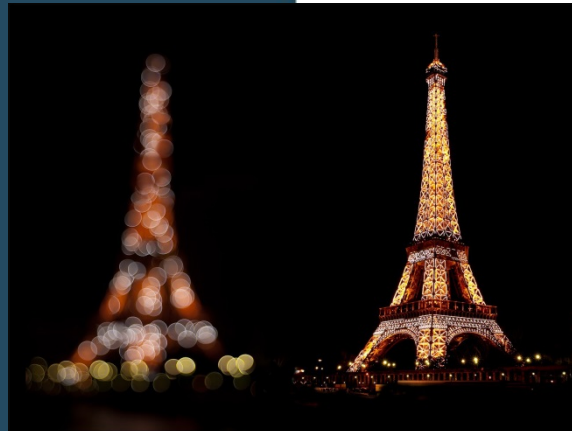


Objective:

From February 1 thru April 17th, jog four times per week averaging 20 miles weekly at a pace of 9 minutes-per-mile.

Outcome:

On April 18, 2016, complete the Boston Marathon in 4 hours – a 10-second-per-mile improvement versus 2015 – or better.



GRANT BUDGETS

- Typical Budget lines include:
 - Personnel
 - Fringe Benefits (standard rates)
 - Travel
 - Equipment (durable, long-lasting)
 - Supplies (expendable, short-term)
 - Contractual
 - Construction
 - Indirect Costs (note limitations)
 - Other



GRANT BUDGET NARRATIVE

- Show a clear method of calculation for each item
- Link each item back to grant activities and the grantmaker goal(s)
- A table can make the information easier to digest, even in the narrative
- Showing proportions of direct costs can emphasize where grant money is flowing
- Integrating institutional investment or matching funds can be powerful





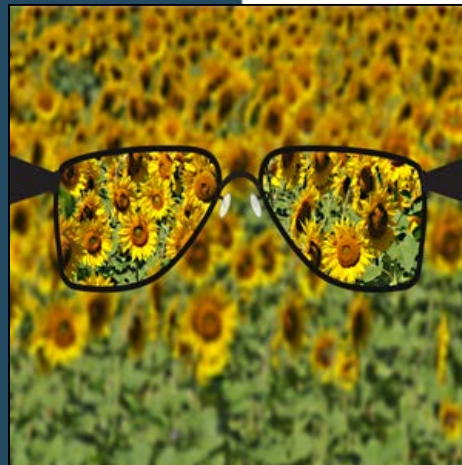
Vague

The University will subcontract with a program evaluation company.
Funding is requested at \$25,000.

Specific



The University will contract with an independent professional evaluation service to conduct a rigorous program evaluation to verify impact and results as outlined in the Evaluation Plan. This cost is estimated \$100/hour and includes 200 hours of work plus \$5,000 in travel costs associated with two site visits during the grant term. Total: \$25,000.



LOGIC MODELS

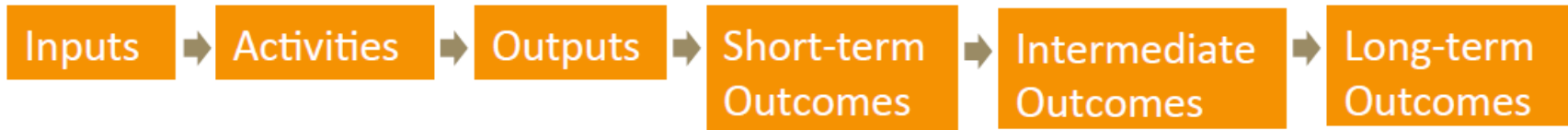
- INPUTS → ACTIVITIES → OUTPUTS → OUTCOMES
- **Inputs:** Resources invested in the project
 - Personnel, Partners, Funding, etc.
- **Activities:** Processes/actions the project will perform
 - Recruitment, Training, Marketing, Evaluation, etc.
- **Outputs:** Expected results from the project
 - Focus on program *implementation*
- **Outcomes:** Short, medium, long range impact
 - Focus on program *effectiveness*

- Especially for multi-year projects, showing prior-year evaluation will inform new-year planning is ideal



LOGIC MODELS

Visual Aids / Resources



OUTCOMES <i>What results for individuals, families, communities.....</i>		
SHORT <i>Learning</i>	MEDIUM <i>Action</i>	LONG-TERM <i>Conditions</i>
Changes in <ul style="list-style-type: none"> • Awareness • Knowledge • Attitudes • Skills • Opinion • Aspirations • Motivation • Behavioral intent 	Changes in <ul style="list-style-type: none"> • Behavior • Decision-making • Policies • Social action 	Changes in Conditions Social (well-being) Health Economic Civic Environmental

SOURCE:
<http://www.uwex.edu/ces/pdande/evaluation/pdf/lmcourseall.pdf>

Logic Model Development Guide: W. K. Kellogg Foundation

<http://www.smartgivers.org/uploads/logicmodelguidepdf.pdf>

PROJECT TIMELINE

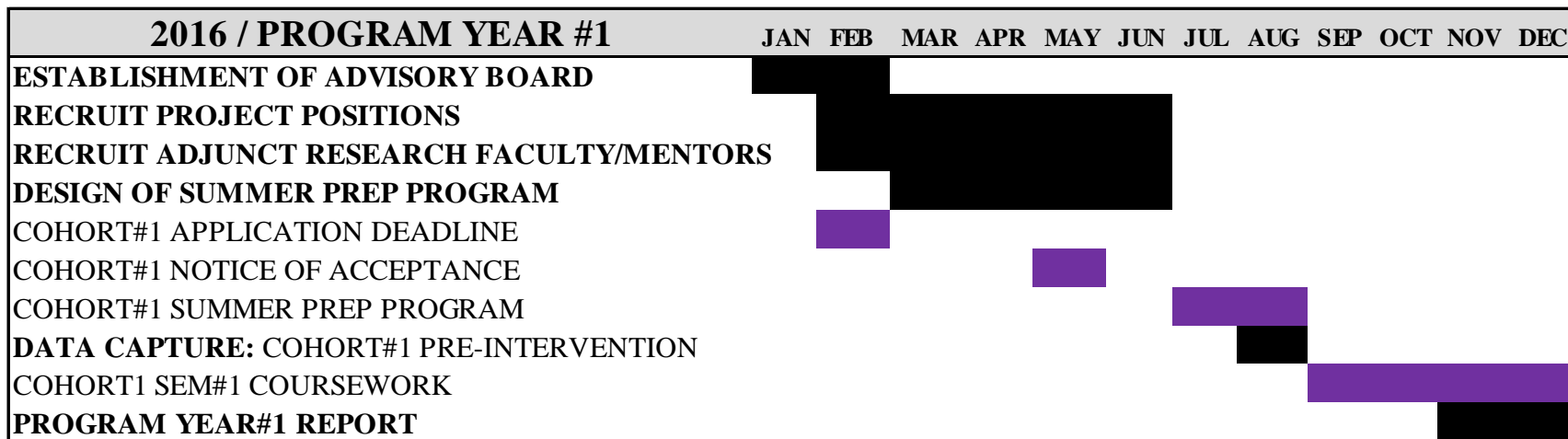
- Even if it is not required, it can be helpful for clarifying what will happen when
- Especially important if grant funds will not arrive at the start of an academic year
- Two primary options:
 - Gantt Chart (Excel)
 - List (Excel or Word)



PROJECT TIMELINE

Examples

Gantt Chart Format

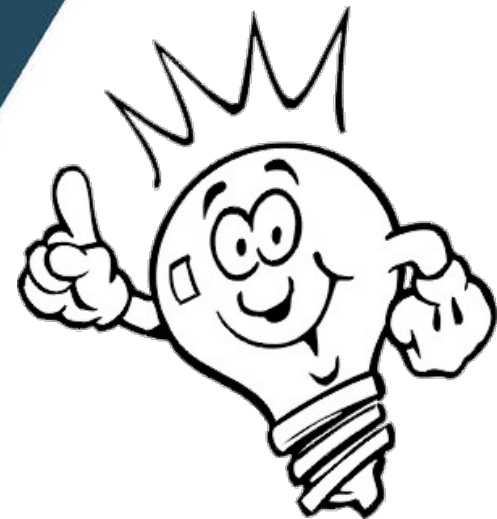


List Format

2016 / PROGRAM YEAR #1	PERIOD
ESTABLISHMENT OF ADVISORY BOARD	JAN-FEB
RECRUIT PROJECT POSITIONS	FEB-JUN
RECRUIT ADJUNCT RESEARCH FACULTY/MENTOR	FEB-JUN
DESIGN OF SUMMER PREP PROGRAM	MAR-JUN
COHORT#1 APPLICATION DEADLINE	FEB
COHORT#1 NOTICE OF ACCEPTANCE	MAY
COHORT#1 SUMMER PREP PROGRAM	JUL-AUG
DATA CAPTURE: COHORT#1 PRE-INTERVENTION	AUG
COHORT1 SEM#1 COURSEWORK	SEP-DEC
PROGRAM YEAR#1 REPORT	NOV-DEC

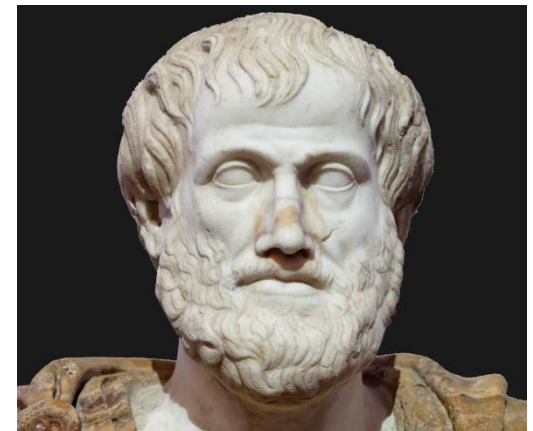
TIPS & SUGGESTIONS

- Write the Abstract last
- Build the Budget as soon as you can – Best to build it as you go!
- **Unless otherwise instructed**, include a header/footer and page numbering on all pages
- Third-person future is preferred
- Avoid digressing; every word should relate to your plan
- Consider the reviewers
- Networking and program officer discussions can help
- Most importantly –
 - respond directly to review criteria!



TIPS & SUGGESTIONS

Aristotle's Modes of Persuasion or Rhetorical Strategies



COMPLETION

What goes in an Abstract?

What is a Letter of Support?

Finalizing the Narrative

What if I Fail?



ABSTRACT

Many funders (like NSF) have specialized requirements, but in lieu of a form or specific instructions, be sure to include the following items in narrative form:

- Organization/PI
- Project Title
- Grantmaker Opportunity/Program Area
- Amount Requested
- Grant Term
- Expected Outcomes (SMART Framework)
- Anything Particularly Unique/Innovative
- Alignment with Grantmaker Goals



LETTERS OF SUPPORT /COMMITMENT

A Letter of Support is an assurance from each contributing partner or collaborating institution that is addressed to the prospective grantmaker and...

- refers to prime proposer & title of project
- confirms interest in participation
- recognizes responsibilities outlined in proposal
- affirms readiness to support prime proposer
- and to provide matching funds/investment if appropriate.



ANCILLARY SUBMISSION DOCUMENTS

At times, a funding opportunity (especially R&D proposals) will require the submission of ancillary submission documents (Appendices, Curriculum, Resumes, Institutional History and Information, Project Evaluation Reports, etc.).

These documents are important! They are often used in the evaluation of applications, can help reserve valuable page space when page limits are challenging, and should be given as much attention as the narrative. Templates do not usually suffice! Craft these documents to be specific to the project for which you are applying.



FINALIZING THE NARRATIVE

- Make sure...
 - the Budget adds
 - All technical submission requirements are met (page limits, margins, font, etc.)
 - the Budget corresponds to the Narrative
 - you have addressed all mandatory elements
 - all information is necessary
 - sufficient detail is provided to describe “how”
 - the voice is consistent throughout
 - you have used appropriate persuasive style
 - reasons the project will succeed are Included



WHAT IF I FAIL?

By submitting a grant you will have...

- Practiced the process
- Established and/or deepened connections
 - Internal, External and Letters of Recommendation
- Developed text and material for future grants and other projects

And maybe...

- Designed a new project
- Put your name/ideas/work in front of disciplinary experts
- Gathered constructive criticism
- Reviewer comments are powerful!



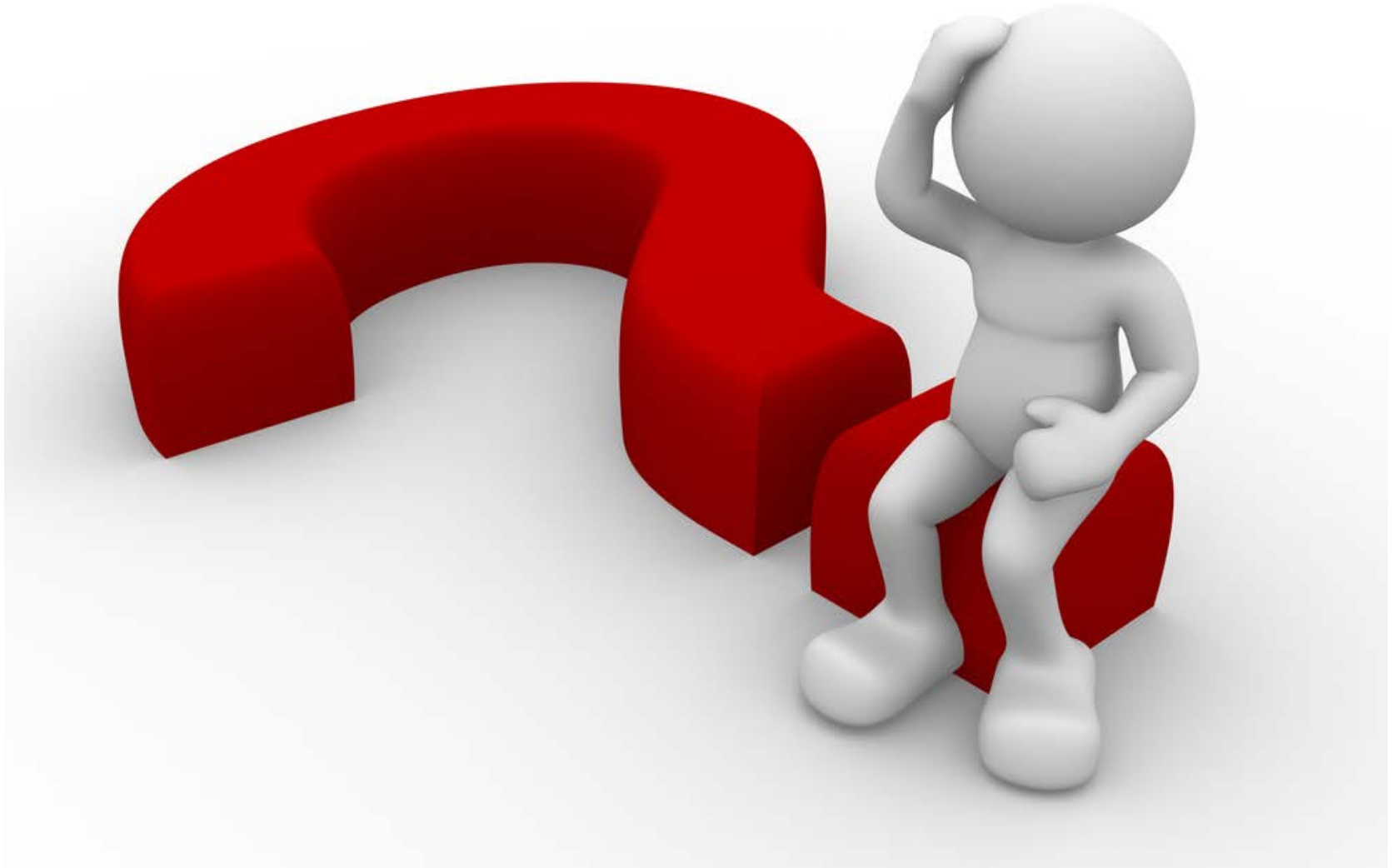
FACTORS THAT MATTER

- Total number of applicants
- Federal fiscal health/investment
- Presidential priorities
- Persistence!

The average grant application is submitted 2.3X before it is successful!



QUESTIONS



Jacklyn Sutcivni

Grants Consultant



Jackie's career as a grant writer spans a broad range of disciplines. Since 2000, she has helped institutions of higher education, healthcare agencies, not-for-profit organizations, and governmental entities obtain more than \$50 million in grant funding. A former research assistant, healthcare professional, public administrator, staff grant writer for higher education, and small business owner, Jackie brings a range of skills and experience to every engagement. Specializing in federal grant submissions, her expertise in federal grant program design, implementation, and management are immediately evident. She is especially skilled in advancing initiatives through the development of multi-partner and consortium grant proposals and balancing faculty and administrative perspectives.



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