

Improve Your Grant Writing Skills

Coastal Conservancy Webinar
September 1, 2016





Webinar Agenda

- Introduction
- Knowing Your Funder
- Describing Your Project
 - Project Summary
 - Project Name
 - Project Need
- Other Sections
- Tasks & Budget
- Conclusion/Summary

Welcome to the Improve Your Grant Writing Skills webinar. Here's a look at the topics we'll be covering today.

Introduction

- Goal: Improve your grant proposals
- Not just focused on Conservancy grant programs
- Presenters



Joel Gerwein, Grants Manager



Eryan Sloane, Project Manager and Grantwriter

This webinar is intended to share helpful approaches to writing grant proposals. It is not specific to Coastal Conservancy grant programs, although we will provide some examples from them. If you have worked with the Conservancy, you know that we provide grants ourselves, but you may not know that we also obtain grants from federal, state and private sources for projects, so we have a lot of collective experience in writing proposals for all kinds of funders. We will share that experience in today's webinar.

There will be two of us presenting the webinar today, and we are going to introduce ourselves now. I am Joel Gerwein and I am the Grants Manager here at the Coastal Conservancy. I spend a lot of my time helping other Conservancy staff find grant opportunities and submit proposals. I also manage projects on the North Coast and review grant proposals.

I am Eryan Sloane. I am a project manager in the South Coast region. I review grant proposals to the Conservancy, and I have also prepared and submitted many successful proposals to other funders.

Introduction

- Real world examples
- Polling
- Questions and Answers



We'll be providing lots of examples today drawn from actual projects and proposals. We have changed the names of projects and organizations when appropriate in order to protect the innocent.

During the webinar, we will be conducting a few simple polls. They are intended to keep you awake, make things more fun, and help us determine whether we are getting our points across.

About 200 people registered for this webinar. Unfortunately, that will limit our ability to answer questions today. However, if you have a question, please go ahead and type it into the chat box. If we have time at the end of the webinar, we will answer questions. If we don't have time during the webinar, we will try to write answers to common questions after the webinar and provide those to all participants. We will also make this Powerpoint available to participants, along with the notes which include most everything we will be saying. We will also make a recording available.

Funder's Perspective



- Don't bury the lead
- Be concise but provide necessary detail
- Don't oversell your project

--This webinar will share tips from the funders perspective. Funders will be reviewing lots of applications. This will likely be on top of other work. There will be deadlines for reviews. That makes reviewers want proposals that are clear and concise, with no extraneous information.

--There are three key points from this webinar that we will highlight. We will be discussing each of these with examples over the course of the webinar:

1. "Don't Bury the Lead."
2. "Be concise but provide necessary detail."
3. "Don't over sell your project. "

We will be going over these three points in much greater detail.

Get to Know Your Funder and the Grant Program

- Agency's mission and goals, areas of focus, past funding awards in your region
- Do their program priorities, timeframes, funding amounts, geographic focus, focal habitat types, and focal species fit your project?
- What level of project development, permitting, or environmental documentation is required?
- What are the biggest scoring criteria?



Before you start writing a grant proposal, you need to make your that your project is a good fit for the funding source.

That means you need to get to know your funder- including the agency's basic mission and goals, and the specific grant program focus and priorities.

Make sure that their program priorities, timeframes for the grant, funding amounts and required match amounts, spatial focus, habitat types, and species all fit with your planned project.

It's also very important to look at the level of project development that the funder requires- Conservancy staff have had the experience of developing an almost full application for a restoration planning project, only to realize that environmental documentation (CEQA/NEPA) and permitting must be completed in order to meet the minimum requirements. If they had waited a year to write the proposal, they would have saved themselves a lot of time and effort.

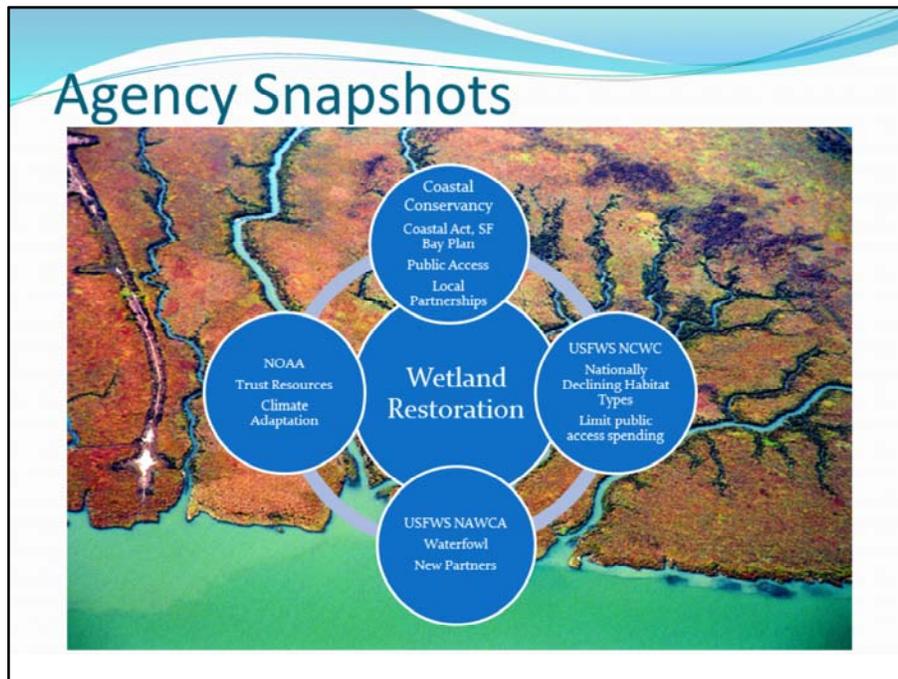
Take a quick look at the scoring criteria and make sure your project will score well on the biggest ones.

Don't be afraid to contact the funder

Please Answer the Phone



Don't be afraid to contact a funder directly to find out whether your project seems like a good fit. But you want to respect their time. Send an email with basic project information and your questions, and if you think a phone call would be helpful, ask to schedule one.

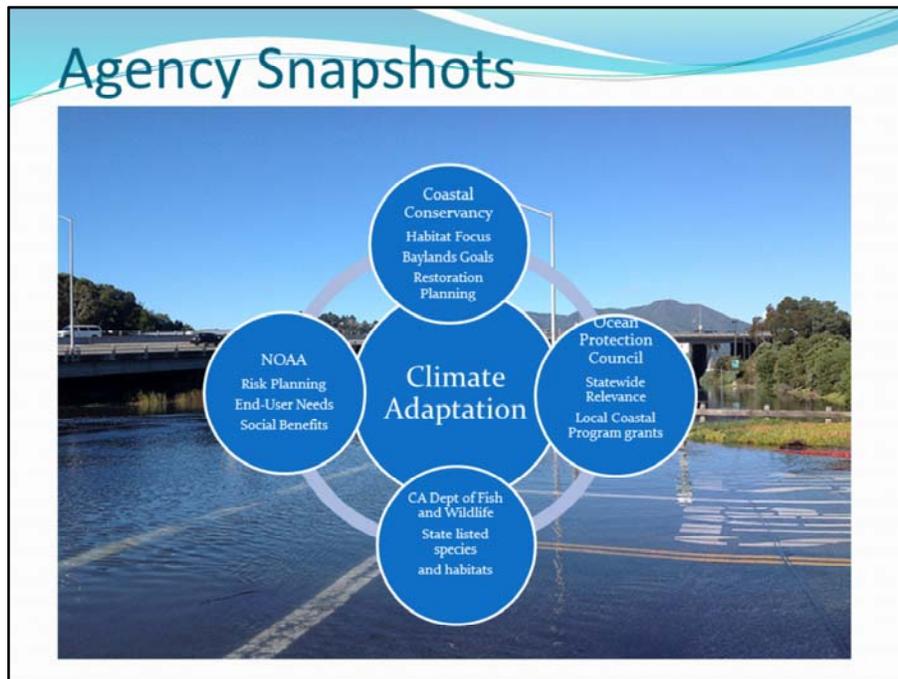


Now I want to walk through a couple examples of how one type of project, such as a wetlands restoration, could be framed differently for different funders.

For an application to the Coastal Conservancy, this could be framed in terms of recommendations in the State Coastal Act and San Francisco Bay Plan; it could include public access, which is part of our mission; and highlight strong local partnerships, which is one of our project criteria.

For the USFWS National Coastal Wetlands Conservation Program, it's important to focus on nationally declining wetland types. Information about these wetland types is available from their website. There are key restrictions to be aware of. For example, you need to really limit expenditures for project components that are not directly related to wetlands restoration, like public access.

Applications to other programs, like USFWS North American Wetlands Conservation Act or NAWCA grants or to NOAA's grant programs, should have different emphases.



Here's an example for a climate adaptation project:

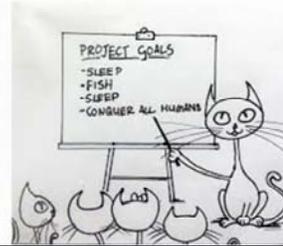
For the Ocean Protection Council, it's important to provide strong statewide context, and be specific on how your project may be a model for other areas statewide. You may want to focus on incorporating climate adaptation planning and response into local coastal program updates.

For the CA Dept of Fish and Wildlife, pay particular attention to state listed threatened and endangered species, and species of special concern, as well as state priority habitats listed in CDFW plans and legislation.

Be creative and find a unique nexus between your project and the specific agency interest!

Goals and Objectives

- **GOAL** = overarching principle that guides decision making
- **OBJECTIVE** = specific, measurable steps that can be taken to meet the goal
 - SMART = Specific, Measurable, Achievable, Realistic and Timebound



Developing your project goal and objectives is something that you should do before you begin to write your proposal.

Goals are broad, overarching principles that guide decision making. A goal may be aspirational and somewhat vague, so that you may not know when you have achieved your goal.

In contrast, objectives are specific, measurable steps that can be taken to make progress towards the goal.

Many funders are asking applicants to use the SMART objective format, with objectives that are Specific, Measurable, Achievable, Realistic and Timebound. Some funders are even moving towards dropdown menus for objectives to quantify common objectives, like acres of salt marsh restored.

Objectives will help you develop your project **tasks**, which we will talk about later..

Example

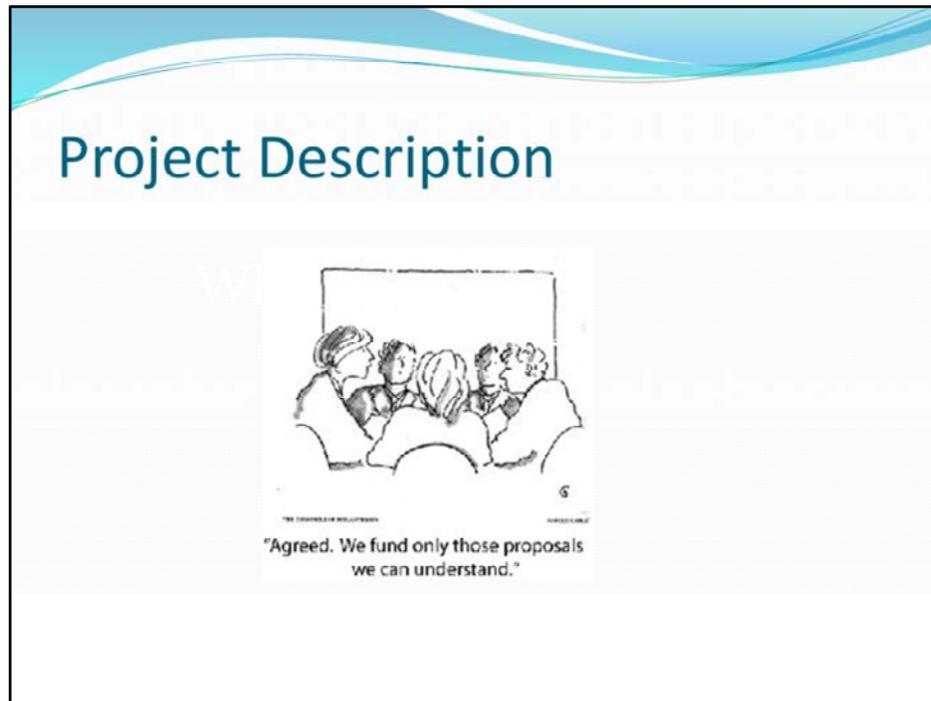


- Goal: Restore a resilient and healthy Groovy River for natural and human communities.
- Objectives:
 - By December 31, 2017, remove at least 27 shopping carts and 8 auto bodies from the Groovy River banks.
 - By December 31, 2018, plant ~~1,000,000~~ 2,000 riparian trees, shrubs, and forbs in the 0.2 mile reach of the Groovy River between Awesome St. and Outtasite Blvd.
 - By December 31, 2019, 200 community members will have participated in volunteer stewardship activities on the Groovy River.

Example goals and objectives. It's good to keep each objective simple and specific by having multiple objectives for different project components.

Note the change made to the second objective above to keep it realistic.

You can provide more details about how you will achieve these objectives in the project description.



The most important thing you need to do when writing a grant application is to describe your project well. One thing you can know for sure is that if the person reviewing your grant is confused about the project, the project won't get funded.

So you must be clear!

Because it is so important to successful grant writing, we are going to spend a chunk of time today talking about how to successfully communicate your project in a grant proposal.



There's lots of different writing styles you may need to use in your professional career. Each has its own approach. For instance, you may be familiar with how scientific papers always start with an introduction full of background information, and then go on to methods, results and conclusions.

In grant writing, as in newspaper writing, you need to start with your conclusion or bottom line, and then give the background and context later.

Just like in news writing, in grantwriting you need to remember that your reviewer may stop reading at any point. Or if they don't completely stop reading, they may switch from reading to skimming.

So your assumption has to be that people may stop reading the proposal, but your goal is to keep them reading.



So just like with a newspaper story, the most important thing to do when describing your project, or for that matter answering any of the grant questions, is to not bury the lead.

Make sure your reviewer knows what the project is and why it should be done from the very first sentence. Are you going to prepare a plan, acquire a piece of property, build a trail, restore a wetland.

It doesn't matter how complicated your project is – you need to be able to describe the core essence of what your project is and why it should be done in one to two sentences. You can get into the details and nuances later, but you need to start with the most important facts right at the beginning.

Now we are going to do an activity where you are the grant reviewers. We are going to show you three project summaries that we have received and you tell us which project you would be most likely to fund based on the information in the summary.

Before we show them to you, I will tell you that the summary has to fit into a set space on our application form that allows about 4 lines of text and 1-2 sentences.

So here are your choices

Which Would You Choose?

1. Completing the Core Objectives of the Johnston Marsh Management and Enhancement Plan.
2. Grant funds will restore tidal marsh and enhance uplands at West End Park in the disadvantaged community of Central Bay. The project will create 10 acres of tidal wetlands, 6 acres of seasonal wetland and 7 acres of coastal prairie in a diked former sand dredging site. Habitat design will provide long term value for key species by taking an adaptive retreat approach to sea level rise.
3. This restoration project involves 20-acres of ruderal lands contained in Elsa Hendrix Park, and once planted, will provide biological connectivity between core lowland and upland habitats. It will buffer habitats from park users and residential areas to the South. The project will fulfill the 1998 GDP for the park, including installation of multi-use trails, interpretive signs, an overlook platform, and provide a link for the City's Central Park and the Pacific Ocean. Viewshed aesthetics will be

Do polling

Put each one up at a time and allow time for folks to read them then initiate the poll and recap the 3 choices.

#1 – Johnston Marsh

#2 -- West

#3

>>Discuss the three choices

End poll. Let audience see results and then resume presentation and discuss issues of each.

The first one about Johnston Marsh is unclear what the project is or why it would be done. Our form leaves quite a bit more room, so this was a missed opportunity.

2.The second one about West End Park is a pretty good summary. It tells us specific habitats that will be restored, and how many acres of each, it tells us that it is in a disadvantaged community which was one of the Conservancy's scoring criteria for this grant program, and it tells us they have thought about sea level rise. My one

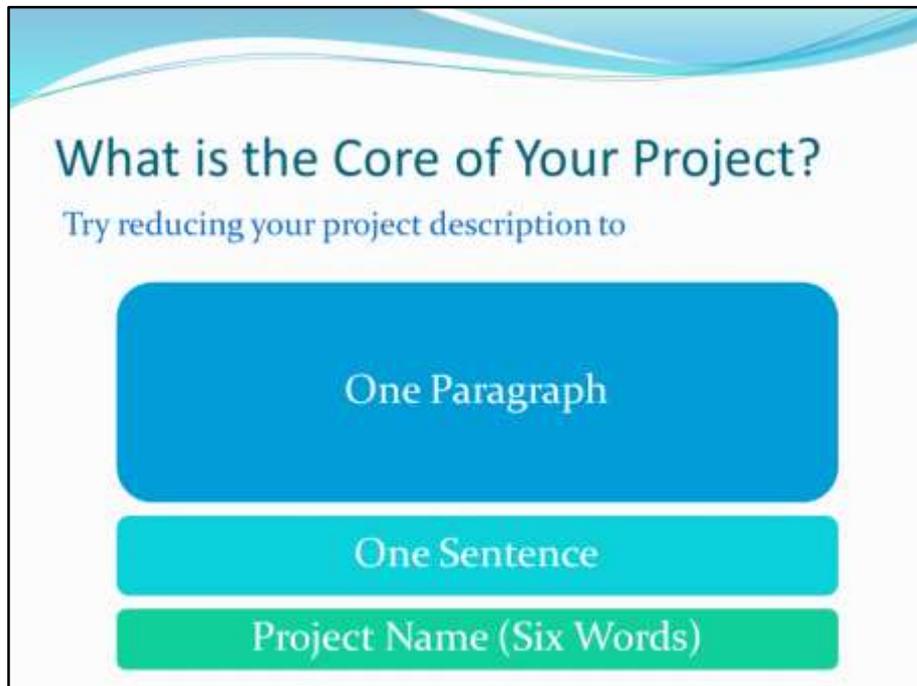
recommendation would be that rather than start the sentence with the phrase “Grant funds”, they should start with the name of the applicant. For example, “The Central Bay Land Trust will restore tidal marsh etc...”

3. This third one about Elsa Hendrix Park has some helpful information, but it also has some problems

First of all, there is no clear statement of what the project is. The reader can figure out that the restoration involves planting 20 acres of ruderal habitat, so that’s better than nothing. But it is unclear what type of habitat will be created. The project also seems to involve the installation of trails and signs, but because of how the sentence is worded this is not entirely clear, and there is no quantification as to how much trail, etc.

Second issue – the summary uses an acronym -- GDP -- that has not been defined. We can assume that it does not stand for gross domestic product, but your reviewer may not know what it does stand for. >>So remember Don’t use undefined acronyms. And in general, you probably want to limit your use of acronyms.

And the third problem is that the summary went longer than the space provided on our form – therefore from the reviewer’s perspective it just runs out. Now if this form is viewed electronically, there is a way to scroll down and see the rest of the text, but if it is printed out, the text gets cut off. So as the grant writer, if a grant form has a specified box size, even if extra text can be entered and viewed electronically, you must assume that the form will be printed and restrict your answer to the available space.



Okay, so we are telling you that it is very important that you be able to describe the core facts of your project right from the get go. So one thing you might want to do before starting a grant proposal is to do this exercise – try taking your project description – in whatever length or format you have it, and then paring it down to one paragraph, and then to one sentence that really communicate the most important elements of your project. If you do this, you can return to this paragraph and sentence over and over while writing your grant proposal to make sure you keep your proposal focused and clear.

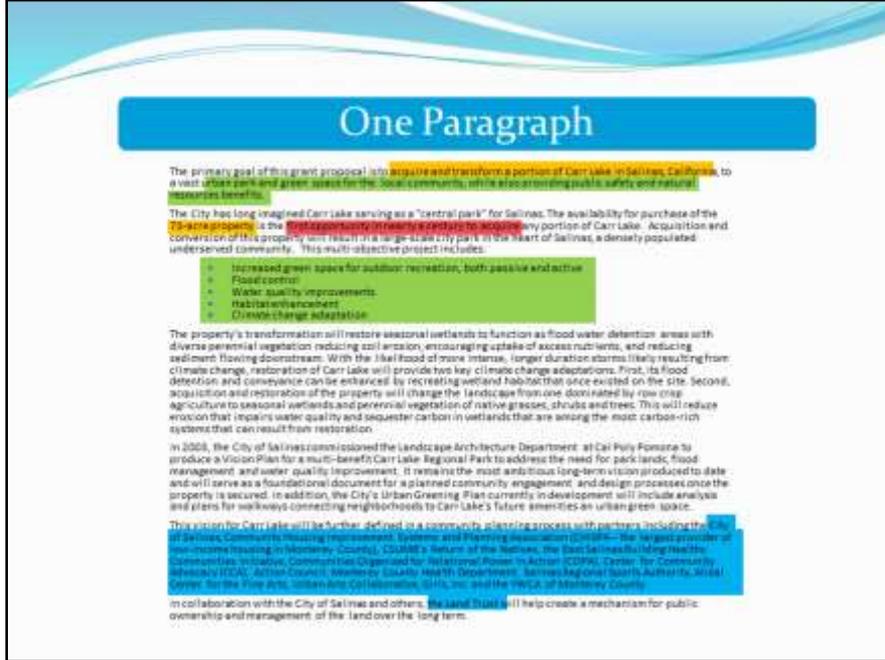
And then to go even further, you can think about the project name. The project name should also try to communicate core information about the project.

So we want to give this exercise a try now.

Carr Lake Property Acquisition



We emailed out to all of you a project description that we received for one of our project rounds that we thought was very well done. And we just want to give a shout out to Big Sur Land Trust for letting us use the Carr Lake Property Acquisition as an example.



Here is a section of the project description which we will be drawing from for our one paragraph summary. There is no one right way to do this, but here are some of the key facts that should get pulled out when parsing this down to one paragraph.

First, we have, in yellow, what is the project? Acquisition of Carr Lake in Salinas – so that also covers where it is. And with any project you want to quantify it when possible, so we want pull out the fact that it is 73 acres.

Second, in green, we have why the project is needed or important? What are its benefits? The benefits are bulleted here which makes them easy to find. Because we are summarizing right now, we have to let go of the detail that is given below the bulleted list.

Then in blue we have who will carry out the project? Who is the lead and who are the partners? In the excerpt we provided it was not abundantly clear that the Big Sur Land Trust is the lead, but that is largely because we took this section out of context from a larger application. Then there is also a long list of project partners. This list is too long to keep as is in a one paragraph description, so you would need to decide how best to pare it down.

Finally in red we have why is this a unique, high priority project? The statement about this being the first opportunity to protect any part of Carr Lake in a century answers that question.

One Paragraph

The Big Sur Land Trust intends to acquire a 73-acre portion of Carr Lake in Salinas, California, with the goal of creating a vast urban park and green space for the local community, while also providing public safety and natural resources benefits. Acquisition of Carr Lake for a community park has been a long held dream and this is the first opportunity in over a century to acquire a portion of it. Project benefits will eventually include:

- Increased green space for outdoor recreation, both passive and active
- Continued flood detention and protection for surrounding urban areas
- Reduced erosion and improved water quality
- Enhancement of wetlands and other native habitats.
- Increased climate change resiliency

Once acquired, the vision for Carr Lake will be developed through a community planning process with the City, community service providers, local residents, local environmental and arts organizations, the Land Trust, and others.

So like I said, there is no right answer to this exercise. Because the project is an acquisition, it is fairly easy to describe what the project will do. Therefore, in this example, we spent more time emphasizing why the project was important and timely. The number of project partners is impressive so we didn't want to lose that information entirely, but in the context of a one paragraph description, we had to lump partners into categories rather than naming them individually.

If you were to start your grant application with this paragraph, you would still want to provide the specifics of all the project partners, as well as more details on the need and benefits, but you could do that later in the application.

If your reviewer only read the first paragraph, they would still get the important gist of the project.

One Sentence

- The Big Sur Land Trust will acquire the 73-acre Carr Lake property as a first step to creating an urban oasis within the City of Salinas that will provide recreation, flood control, wetland habitat and build climate change resiliency.

Based on the description we gave you, here is what we came up with when we tried to pare this down to one sentence:

The Big Sur Land Trust will acquire the 73-acre Carr Lake property as a first step to creating an urban oasis within the City of Salinas that will provide recreation, flood control, wetland habitat and build climate change resiliency.

In this one sentence we manage to capture the who, what, where, and why of the project.

Your Project in One Sentence

[Organization]

is requesting \$[Amount]

to [Specifically What Will Be Done]

for [Need/Benefit of Project]

The State Coastal Conservancy is requesting \$200,000 from the Fisheries Restoration Grant Program to remove three fish passage barriers on Coastal Creek in order to provide improved access to five miles of spawning habitat for coho salmon.

And now here is our handy formula for an opening sentence you can use in just about any grant application

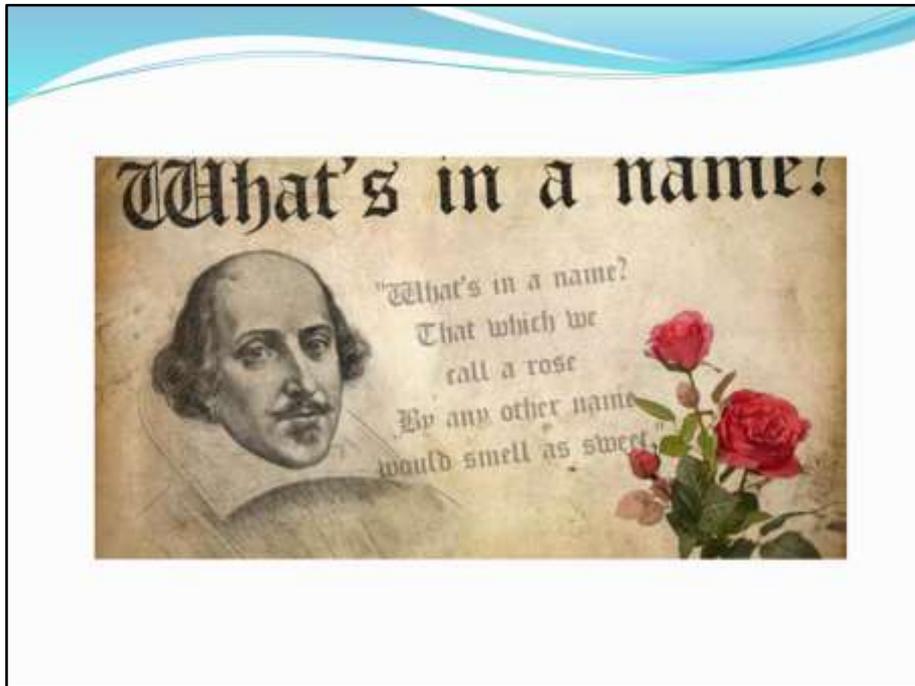
[Organization]

is requesting \$[Amount]

to [What Will Be Done and Where]

for [Need/Benefit of Project]

In this example, we have also included the funding program that is being applied to.

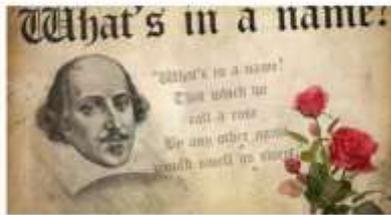


It may not matter what we call a rose
But it matters what you name your project

A few things to keep in mind: this is your first chance to communicate with a potential funder about your project.

Naming Your Project

- Short and simple
- No colons
- Start with a place name
- Convey the core essence of the project
- If possible, be memorable



Some tips from us

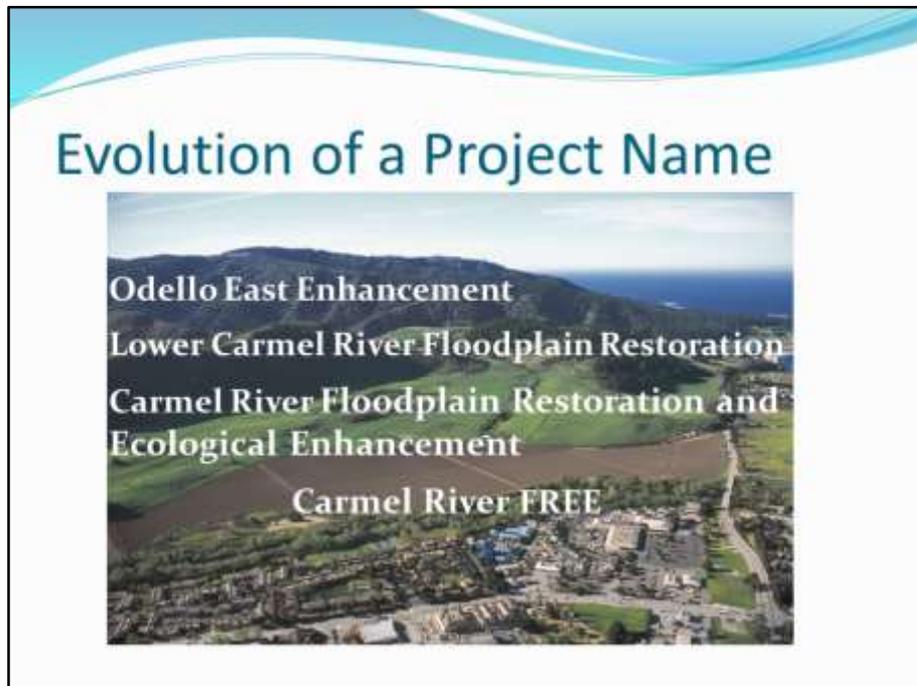
Keep it Short and simple – 6 words is a good maximum. From the granting agency's perspective – the project name is going to be used in forms, databases, reports, etc. It needs to be useable.

No colons – You may have been told to use colons in academic papers, but don't use them in grant writing.

Start with a place name

Convey the core essence of what the project is – Wetland Restoration, Trail Plan

If possible, be memorable – but don't do this at the expense of being short and simple and conveying the basic gist of your project.



Here's an example of how a project name evolved over time in our office.

It started out as the East Odello Enhancement Project. This tells you almost nothing about the project unless you happen to know where the East Odello property is.

It then became the Lower Carmel River Floodplain Restoration Project – this is a perfectly good project name.

But our grantee later changed it to the Carmel River Floodplain Restoration and Environmental Enhancement Project – This is also a perfectly reasonable name and the reason it is better than the old name is it can be condensed to:

Carmel River FREE

And that makes it memorable. People talk about it and that can build momentum.

Why This Project



Okay, so now that we've talked about getting to the core of your project, we want to provide some more tips on talking about why the project is needed and what the benefits will be.

Obviously this is an important factor for a funder who is deciding which projects to fund. On the Conservancy's application, the very first question is about the project need. And, somewhat surprisingly, this seems to be a very difficult question for grant writers to answer well. We get a lot of long, unclear answers to this section and we have heard from other funding organizations that this is also a common problem for them.

In short, giving the funder a clear and simple statement of your project need will, in the approximate words of Jerry McGuire, help us help you.

Why This Project

- State the **specific** problem
- Brief restatement of the solution (i.e., your project)
- List the **specific** benefits of this solution

Grant applications can have many different ways to address project need– sometimes you will be asked to state the problem that will be addressed, or describe the project need, or describe the benefits of the project. In general, we recommend that the answer to any of these questions include:

The problem

A brief restatement of the solution (in other words your project)

And then the benefits

Within that context, we have some additional advice..

Grant Writing Lessons

- Don't bury the lead
- Be clear and concise



First let me reiterate the core themes of this training:

Don't bury the lead. If the application asks what problem will be addressed, the very first sentence should state the problem. It may be more complicated than can fit in a sentence, but your job is to pare it down to the core problem and make it fit in one sentence. You can elaborate later.

Be clear and concise – if you are asked to describe the project benefits, consider listing them as bullets. You can elaborate on each one in subsequent text, but make sure the reader gets the most important points right away.

Start Specific, Not Global



Don't start from the global perspective.

Start Specific, Not Global



For instance if your project is to restore a degraded wetland, don't start by saying that California has lost 90% of its wetlands. Start with what is wrong at the particular wetland that you want to restore. Later you can put it in this larger context if it is helpful.

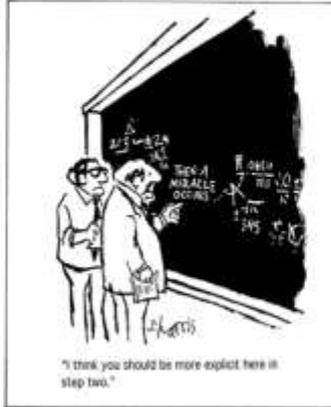
Start Specific, Not Global



Here's another example. If you are doing a project to improve water efficiency at farms in a region – don't start with the economic importance of agriculture in that region. Start with information about the impact of the lack of water – perhaps there is not enough water for salmon in the adjacent creeks or the local groundwater aquifer is being overpumped. If you want to talk about the economic importance of the project, you can, but just to lead with that.

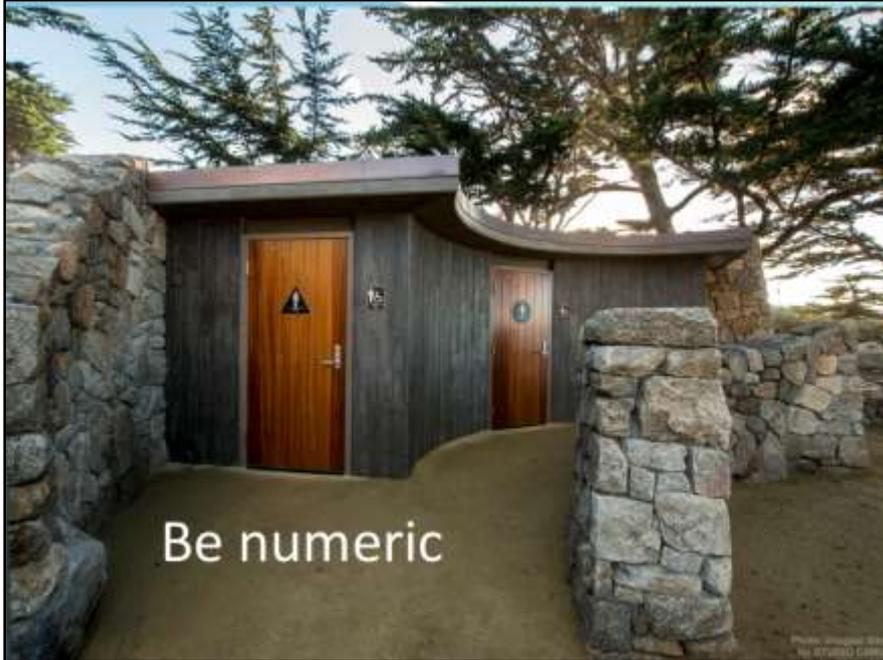
Be Specific

- Be numeric
- List specific issues and/or benefits.
- Provide context
- Be unique



What does it mean to be specific? You need to..

- Quantify the need and/or the benefits
- List specific issues and/or benefits
- Provide context for your project
- Be unique



Being specific also means being numeric. For instance,

Suppose you want to build a new bathroom along the beach in Happy Town. In order to make the case of why an agency should fund this, you should provide numeric information like:

- How many people use the beach in Happy Town every month or year?
- How far is it to the closest public bathroom?

List specific benefits



You also need to list specific issues and/or benefits of your project to demonstrate project need.

It is not enough to say that your project will restore a creek. You need to explain what that restoration will mean. Let's say for instance that your project will remove levees to restore a creek's connection with its floodplain. In that case, you need to make sure to specify that the creek will in fact be reconnected to its floodplain.

List specific benefits

- Increase filtration by 20%
- 10% more water in creek during summer
- 50% increase riparian habitat
 - More shading
 - Lower water temperature
 - More large woody debris
 - Greater habitat complexity

You would also want to also discuss that connecting to the floodplain will lead to increased infiltration, which could lead to more flow in the creek in summer. Also, the project will increase riparian habitat which would then increase shading and decrease water temperature, and eventually increase large woody debris and aquatic habitat complexity in the creek.

Provide context



You also want to provide context for your project in the project need – If you are doing a trail project, you need to say how many miles of trail will be built, but you also want to put that in context. If it's in an urban area, you might want to say how many people live within a half mile of that trail. Or if it connects to existing trails, then include information on how many miles of trail in total would be available.

Be Unique

The Property is the final and most critical acquisition remaining before restoration efforts can reestablish historic conditions of the largest coastal wetland complex in Southern California.



And of course, you want to highlight what is unique or special about your project – basically what makes it stand out from a crowd

- Is it the last barrier to be removed on a river?
- Will it provide benefits to a community that is low-income or typically over-looked?
- Will it pilot a new method or technology that might be replicable elsewhere?

Don't Oversell Your Project



Don't oversell your project- this sets off alarm bells for the reviewers.

If you have quantified your benefits, we know what the project will do. You don't need to tell us it will save the world.

For example, on the Conservancy's Prop 1 application, there is a list of eleven potential objectives your project can contribute towards. If an applicant checks every one of those, this makes the reviewer wonder if the applicant is exaggerating and could lead to a loss of applicant credibility.

POLL: What is the Project Need

Big City has an inventory of approximately 13,000 residential, multi-family, and commercial properties which operate on On-Site Wastewater Treatment Systems (OWTS) also known as septic systems. From these systems, approximately 19% are categorized as high risk by the City and the Regional Water Quality Control Board (RWQCB). A system is considered to be high risk if it is 900 feet away from active water wells, 600 feet away from an impaired water body, 150 feet away from streams and other bodies of water and flow paths, or if a system is 5 feet from groundwater. Many of these impaired water bodies are home to many species and the City strongly believes that the exceeding Total Max Daily Load (TMDL) of bacteria will be addressed through the abandonment of septic systems.

This is the very first paragraph of a project need section that we received in the past. We know this is a long paragraph to read, but read it pretty quickly and also pretend you have 40 more just like it to read to really see it from the funder's perspective. To that end, I will give you a minute to and then I will show you some possible project needs for this project and you will select the best one.

Start poll:

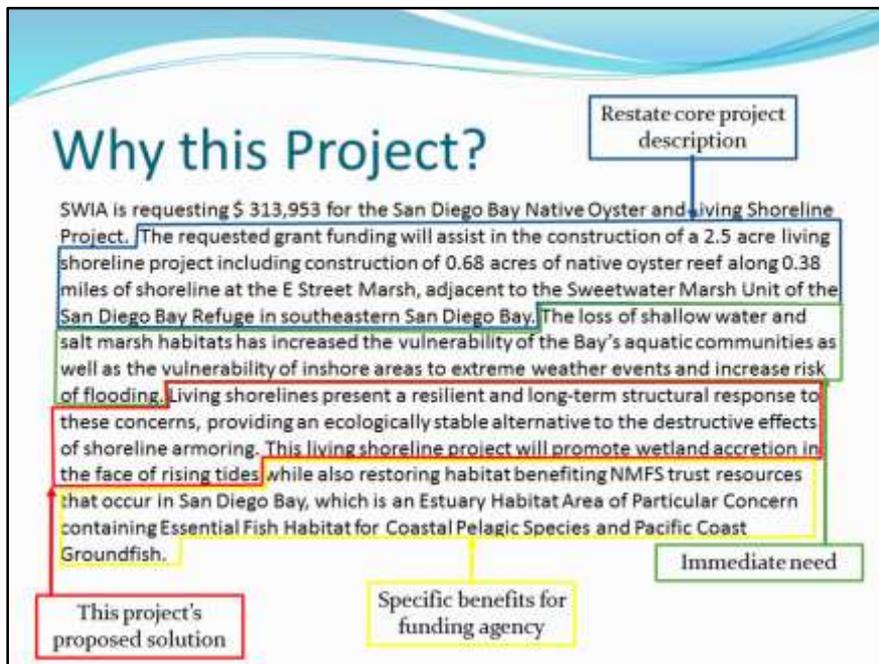
Reduce risk to drinking water sources

Reduce bacteria in impaired water bodies

Reduce impacts to wildlife

Improve water quality in Big City Creek

So many of you chose X. The actual project need for this project was "Improve water quality in Big City Creek." However as the funder, when we got to the end of this paragraph, we had no idea what the need of the project actually was, which is a major problem. Further, this paragraph never even mentions the site name of Big City Creek.



On the other hand, here is an example of a well written paragraph addressing project need in terms of both the problem and the beneficial outcomes.

(CLICK) First, it restates the project description of constructing 2.5 acres of living shoreline in San Diego Bay.

(CLICK) It then establishes the immediate need of the project which is that shallow habitats have been lost and inshore areas are vulnerable.

(CLICK) Next, it illustrates this project's proposed solution of protecting inshore areas from extreme events and flooding via wetland accretion and oyster reefs.

(CLICK) And last it identifies specific benefits of the project including restoring habitats that is important to species of concern for the funding agency.

Other Sections

- Answer questions concisely, simply, & directly

TIP: repeat the question + "because" + your answer



There are many other sections within grant proposals that we don't have time to get into today, but everything we've already discussed applies to those other sections. Some of these sections will be where you can provide the detailed information that you didn't include in your project description or project need. However, even when answering detailed questions, you should still be concise and direct.

For instance, similar to developing a project description and project need, you must answer grant questions concisely, simply, and directly. (CLICK ANIMATION) A useful tip for answering a grant question is to simply repeat the question, add "because," and write your answer. While you won't get the chance to demonstrate your poetic skills, you will provide the funder with a clear and direct answer to their question using this format.

Other Sections

- Use topic sentences to guide your paragraphs
- Only provide necessary detail

TIP: while writing, make the topic sentence of each paragraph **red** & only include information that supports that sentence

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"I'm working on this run-on sentence that has no subject-verb agreement and ends with a dangling participle. It's going to blow Mrs. Anderson's mind."

Topic sentences are also key in providing answers longer than one sentence. Use topic sentences to guide your response and only provide information that supports the topic sentence in the paragraph. (CLICK ANIMATION) A useful tip during the writing process is to mark each topic sentence in red and make sure that you're only including information that supports that sentence. But please, remember to remove the red markings before submitting the proposal.

Other Sections

- Use consistent language/keywords throughout proposal



More generally, remember to be consistent in your language by using those keywords you identified as important in the beginning of your grant writing process and don't be afraid to reiterate key themes. Yes, you don't want to be overly redundant, but reminding the funder of what your project is and why it's important is a good practice to an extent. Remember, the funders are reading many proposals and need help to remember the importance of your unique project.

POLL

- Question: Describe how the project is consistent with best available science.
- Answer #1: The Clean Water Project will construct a variety of SCMs such as dry-wells, bioswales, and infiltration galleries and will be using innovative techniques and emerging technologies.



Now we will take a poll to see which of these two examples best answers the grant question. This question comes directly from our Prop 1 RFP. The question is “describe how the project is consistent with best available science.” Your first option is, “The Clean Water Project will construct a variety of SCMs such as dry-wells, bioswales, and infiltration galleries and will be using innovative techniques and emerging technologies.”

The second option, I will give you 1 minute to read yourself and then we will start the poll (CLICK TO NEXT SLIDE).

(AFTER RESULTS)

...this response is not sufficient because it does not say why those techniques are using the best-available science. Was there a research study done demonstrating their effectiveness? Was there a science advisory committee that reviewed all of the possible options and selected these ones? Do the methods come from a science-based plan? Further, using innovative technology is not necessarily synonymous with using the best-available science AND SCC provides a separate section within the RFP to address innovation. (CLICK BACK TO ANSWER 2)



- Question: Describe how the project is consistent with best available science.
- Answer #2: The Project was developed on a foundation of best available science, has frequently consulted with and incorporated recommendations from experts, and has made numerous contributions to various aspects of the science of invasive species management and restoration. Advice from Golden State University researchers helped inform the basis for the Project's vegetation management strategies, followed by experimentation by partners around the Estuary to determine the optimal treatment methods, herbicide concentrations and rates, and equipment and delivery systems. The Project also relies heavily on genetic testing and has a geneticist on staff that works with the UC Berkeley Genomics lab to score results and perform quality control checks throughout the field season.

(START POLL AFTER ONE MINUTE & THEN WAIT FOR RESPONSES)

It looks like most people agreed that Answer #2 is a more complete response to the best available science question.

Going back to Answer #1...

(AFTER ANSWER 1 DESCRIPTION)

On the other hand, Answer #2 provided more necessary detail to demonstrate that they have consulted with various academic institutions in developing their methods as well as scientifically testing those methods with their academic partners in the field. Although this may seem verbose compared to our suggestions of being direct and concise in other parts of the proposal, this section is an area where you must provide all of the necessary detail to adequately answer the question at hand. This may be especially important for new, innovative projects that may be unfamiliar to your funder, particularly in justifying project elements like high monitoring costs and the need for experimentation within the project.

Addressing Scoring Criteria

- You need to provide all the information to address all criteria
- Remember some scoring criteria may not be addressed in a question
- Review scoring criteria to assure all answers adequately address all criteria

TIP: number sentences within proposal to match each scoring criterion



Addressing all of the listed scoring criteria within a RFP is essential to scoring high enough to qualify for funding. You might assume that if you answer all of the questions within the RFP that you have in-turn addressed all of the scoring criteria. That is not necessarily true. Remember to review all of the scoring criteria several times throughout the writing process to confirm that they have all been addressed somewhere in the proposal. A useful tip to ensuring this happens, is to write the number of each criterion next to the sentence that addresses that criterion within the proposal. Then once you have checked that each one has been addressed, remember to delete the numbers before submitting the proposal to the funding agency.

Example

- In SCC's Prop 1 application one of the scoring criteria is "the extent to which the applicant demonstrates experience successfully implementing similar projects or demonstrates appropriate and necessary partnerships to complete the project"
- There is no specific question in the application addressing this criterion
- This answer could fit under the "project and applicant history"

For example, in SCC's Prop 1 application one of the scoring criteria is "the extent to which the applicant demonstrates experience successfully implementing similar projects or demonstrates appropriate and necessary partnerships to complete the project." There is no specific question within the RFP that addresses this criterion, so you yourself need to make sure that you demonstrate your entity's experience and capability to complete the project somewhere within the proposal. For this particular criterion, it might be best to include the explanation under the "project and applicant history."

Developing Tasks

- What are the project activities?
- How will they be completed?
- What is the timeline?



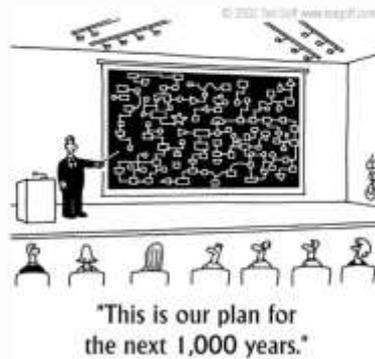
After you have described your project and project need, you will need to tell the funder how you will accomplish your objectives. This is done by developing a clear list of tasks and is another challenge that grant writers face. The tasks should tell the funder what activities you will undertake, how you will do them, and how long they will take.

Let's go through some examples to see how this can be done well.

Developing Tasks

Too Detailed:

- Task 1. Reporting
- Task 2. Direct Administration
- Task 3. Contract Administration
- Task 4. Site Inventory
- Task 5. Water Quality Analysis
- Task 6. Geotechnical Analysis
- Task 7. Design
- Task 8. CEQA
- Task 9. Permitting
- Task 10. Construction Contracting
- Task 11. Construction Mobilization
- Task 12. Demolition and Removals
- Task 13. Installation of trees
- Task 14. Monitoring
- Task 15. Outreach
- Task 16. Education
- Task 17. Post Construction Stabilization



This is a list of tasks that is way too detailed. Many of these tasks could be combined to be more general categories. For instance, Tasks 1-3 of reporting, direct admin, and contract admin could all be combined into one Admin task.

Developing Tasks

Not Detailed Enough:

- Task 1. Project Management
- Task 2. Implementation
- Task 3. Monitoring



Whereas this example is not detailed enough.. what does implementation mean? Is that just the construction costs? Does it include implementation of the education and outreach component as well? This task list needs some more details.

Developing Tasks

Just Right:

- Task 1. Administration and Reporting
- Task 2. Planning
- Task 3. Design and Engineering
- Task 4. Environmental Compliance
- Task 5. Construction
- Task 6. Monitoring
- Task 7. Education & Outreach



This is an example of a well-balanced task list.

Budgeting

- Level of detail
- Basis of the budget
- Showing leverage/match
- Acceptable costs



Once you have defined your tasks, you need to tell the funder how much each task will cost. For this section of the webinar, I will focus on how to present budget information in your proposal. Here are the topics I will touch on.

How detailed should you make your budget?



- Provide a general summary budget and a detailed budget
- Why? To meet two goals of Grant Budget:
 1. Show what grant funds will be spent on (Summary)
 2. Demonstrate that project costs are realistic and have been thought through (Detailed Budget)

As a reviewer, I am looking to a budget to answer three main questions. Two of those are:

1. What will grant money be spent on. For this question I want to see a summary budget that gives me a good sense of how much of the budget is going to project management vs. construction vs. monitoring.
2. Are the project costs reasonable and justifiable. For this question I want to see a detailed budget that gives some indication of the basis of project costs.

So it helps me to see a budget or budgets that answers both of those questions.

Summary Budget

Summary Budget	Cost	Funding Source			
		SCC	Applicant (In-kind)	Army Corps	CDFW
Task 1. Planning and Project Management	\$30,000	\$25,000	\$2,500	\$2,500	
Task 2. Riparian Revegetation	\$205,000	\$100,000		\$50,000	\$55,000
Task 3. Monitoring	\$7,500	\$7,500			
Total	\$242,500	\$132,500	\$2,500	\$52,500	\$55,000

Make sure budget tasks correspond to tasks in grant narrative.

Here's an example of a summary budget. Although this budget is divided into more general tasks than we would have recommended, for this example they are easy to understand and give a good overall sense of where the grant money will be spent.

Remember to make sure that the tasks in your budget exactly correspond to the tasks in your narrative project description.

You also want to use round numbers in the summary budget like this. We know the budget will probably change a bit before going under contract, but at this stage, we just want to have a general idea of costs.

The summary budget is also a good place to show matching funds. Remember that I said I look to a budget to answer three questions. The third question is what matching or leveraging monies will be funding the project. Including those funds in a summary budget is good so you don't have to assign the funds to very specific subtasks. You can also show matching funds in a separate table if you don't want to assign them to specific tasks.

Detailed Budget

(Note that final numbers may change as project designs are finalized)

PROJECT BUDGET GROOVY RIVER RIPARIAN REVEGETATION PROJECT		
Activity	Cost Basis	Cost
Task 1. Planning and Project Management		
Planning	100 hrs @ \$50/hr	\$5,000
Project Management	250 hrs @ \$50/hr	\$25,000
Subtotal		\$30,000
Task 2. Riparian Revegetation		
Labor for planting	5,000 hrs @ \$20 per hr	\$100,000
Plant materials	90 sites @ \$1,000 per site	\$90,000
Supplies and equipment		\$15,000
Subtotal		\$205,000
Task 3. Monitoring		
Surveys (special status species, cultural resources, baseline conditions and monitoring)	50 hrs @ \$75/hr	\$7,500
Subtotal		\$7,500
TOTAL		\$242,500

This detailed budget provides a basis for the overall costs assigned to each task. It communicates to a funder that your budget numbers are sound and well founded.

Some funders ask for a high level of specificity in proposal budgets and you may not have much choice in the format or detail you provide. The Conservancy and some other funders don't require a lot of detail or specify a detailed format. But we still want to have a sense of where your budget numbers come from and how they are justified.

Budget Narrative/Explanation

- Highlight and explain any unusual costs
- Explain any contingency plans if pending funds are not awarded (e.g. other sources of funding, phased or partial implementation)
- Briefly explain basis for budget. For example:
 - Engineering cost estimate
 - Based on similar projects implemented by grantee



In addition to a budget table, you will often want to provide at least a limited budget narrative. This is a good place to provide funders with more information on a few budget related issues. For instance, if there are any unusual items or high costs in your budget, you should explain them here.

Additionally, if your budget includes other funding sources that you have applied for but haven't secured yet, you should explain any contingency plans in case they don't come through. Are there other grants you will go after, or can the project be implemented in a phased approach? Funders understand that you don't always have all your funding in place when you apply to them, but we also don't want to tie up grant funds for a project that may not be implemented anytime soon.

Last, in the budget narrative you want to include a brief explanation of where your budget numbers came from. That could be as simple as saying that the budget is an engineering cost estimate or that you have implemented a lot of similar projects and are confident about what the costs will be.



"Good news, man, when we give money to the poor man, it will qualify for federal matching funds."

Match vs. Leverage

- Match: **required** funding from other sources
 - Don't double count match
 - Don't commit more than you need
- Leverage: not required, but demonstrates strong partnerships and support (include in-kind).
- Indicate whether funds are secured or pending.

Let me say a word about matching funds vs. leveraging funds. When I say matching funds, I am referring to other funds that are **required** by a grant program. Typically a grant program will require a certain kind and percentage of matching funds. For example, some federal programs require that 50% of the total project cost is funded by non-federal funds. In these cases, you should be careful not to double count match funds for more than one proposal- that usually is not allowed. You should also be careful not to commit more match than you need to meet the requirement or to maximize your score under the ranking criteria, because you might need those matching funds for another grant program. You are also obligating your organization to provide that amount or ratio of matching funds. You don't want to make that obligation any harder to meet than you have to, in case things change with your expected match funds.

You should show all the outside funds you expect to use for the project- it will make a good impression to see how much you are leveraging the grant funds you are requesting. But don't commit any more funds as match than you have to.

You can also indicate that the funding source for some project costs are TBD, but indicate if you have already applied to or are planning to apply to specific grant

programs. That way you are upfront about what the status of your fundraising is but you also indicate that you have a plan to secure the needed funds and that you have identified other grant programs that are a good fit. If funds are not secured but you are very confident that they will be provided, explain that as well.

SCC Prop 1 RFP doesn't require match but awards points for non-state match only.

Acceptable costs

- Make sure the costs you include are allowable under RFP
- Indirect costs are allowable but should be explained
- Make sure the grant funds are budgeted primarily for tasks that fit the funding source.



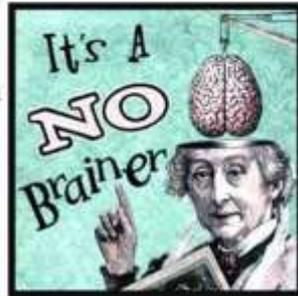
The RFP should tell you if certain costs aren't allowable. For example, state bond funds can't be spent on refreshments, so food for volunteers, while a reasonable project cost, is not an allowable cost for grant programs funded by state bonds.

Many grant programs, including the Conservancy's, allow indirect costs or overhead to be included, but there are often specific rules or caps on how to charge overhead or indirect. You may need to have an approved indirect cost rate and you may only be able to charge indirect on certain categories, like staff time. Federal agencies now allow organizations without an approved indirect cost rate to charge a rate of 10%.

Make sure that most of your budget is going towards tasks that fit the grant program's main goals. Some cost categories may be allowable but funders don't want to see too much of the grant going to that category. For example, everyone understands that monitoring is a necessary part of doing a project, but most funders don't want to see too large a percentage of a grant going to fund monitoring.

No Brainer Checklist

- Start Early
- Read instructions all the way through
- Follow the instructions, including format
- Submit the application on time
- Answer all of the questions
- Address all of the selection criteria
- Define all acronyms
- Get the funder's name correct
- Accept track changes



- Start Early -Make sure to allow time to create or secure all of the required info – support letters, maps, photos, etc
- Read instructions all the way through
- Follow the instructions, including format
- Submit your application on time (pay attention to time differences with grantors in different states). Is a hard copy required? By when?
- Answer all of the questions
- Address all of the selection criteria – whether or not there is a specific question about them
- Define all acronyms
- Get the funder's name correct
- Accept track changes

Take Home Points

- Don't bury the lead
- Be concise but provide necessary detail
- Don't over sell your project



I want to conclude by putting up some of our key points that we discussed early on.

This final cartoon illustrates that intense competition for government funding is not new- it goes back at least as far as the presidency of- you guessed it- U.S. Grant!

Thanks for joining the webinar. We will try to answer some of the questions you sent in and send those out to you along with the presentation.