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**GET THAT GRANT**

**The Grant Winning Success Formula**

Learning and Action Plan
Workbook 1 – Funder-mentals

The Community Entrepreneur

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Get That Grant – The Grant Winning Success Formula

Welcome

**Congratulations on embarking on your journey to becoming an expert grant writer. Imagine your sense of achievement when your well-argued funding applications get funded.**

In this training program we will turn grant writing inside out. We will start by getting into the head of the funding body to understand and feed back to them exactly what they are looking for. We will also explore where you can get air-tight evidence to demonstrate and argue the need for the project and for funding.

You will practice putting together a step-by-step plan of action, including what tasks are important for all projects, as well as learning how a well-constructed plan builds trust with the funder.

How you put together your budget can make or break a project proposal. You will discover what traps in the budget could lose you the grant.

Once you get the money, you want the project to succeed. Sometimes things happen that are out of your control. What if you could predict the worst case scenarios and build in measures to reduce their impact should they occur? How do you minimise the risk of things going wrong. Likewise, how do you know your project has been a success? How do you know the project has achieved not just your outcomes, but also those that relate to the funding body? How can you collect evidence to celebrate your success and or identify opportunities for further funding? You will learn how to prove to the funding body that you have planned for risk and have put in steps to measure the success of your project?

This program will also feature tips for you to deliver applications that stand out, that look good, that get the trust of the funding body that your project will succeed and to attract the funding for success.

In this guide, you will be able to make notes from the videos and hone your grant writing skills. Use these templates over and again to draft your real life grant applications. As you will learn from this program, most funding grants are based on similar grant writing principles.

So, get started now and we look forward to meeting you on the other side.

**Pat Grosse**

Introducing the Grant Winning Success Formula

Grants are a good investment that enable you to develop and deliver new or revised products and services or to purchase equipment, resources or even update assets such as buildings.

Competition for grants can be tough, but that doesn’t mean that you should undervalue what you have to offer when you apply.

This training program is your opportunity to learn from somebody who has been involved in funding for over 25 years, on two continents and at both sides of the funding fence. I have managed a multi-million pound training fund, assessed a whole range of applications for small grants through to mega capital infrastructure funding requests. I have organised training programs to get funding from the European Union and presented briefings for grants in Australia. I have been the ‘desk officer’, providing feedback on questions and have developed funding criteria. More recently my focus has been on grant writing and supporting others to write successful grant applications.

I developed The Grant Winning Success Formula, drawing on this varied experience to improve the ability of business and community to compete with those already adept at securing grants.

## Who should use it

This training resource is useful for:

* People wanting to become grant writers
* People in organisations who have been given the grant writing role
* People who want to increase their grant success rate
* People who want to improve their grant writing mindset
* Managers who want to be more aware of what’s involved in grant writing
* Organisations wanting to train a group of people to write grant applications

This is a resource that can be re-used for new staff or volunteers, reducing the knowledge gap when people move on. It can be used for up to three people involved in the organisation at any one time and passed on when there are changes. It contains planning tools to help prepare grants and to put together ideas for future funding.

What is involved

This training resource comprises five instructional videos, one per module, covering:

1. Funder-mentals – getting inside the head of the funding body / unpacking information before you get started
2. Project Planning 101 – organisational fit, arguing the case and planning your project activities
3. On the Money – the story within the budget - the importance of getting the budget right
4. Reduce your Risk and Measure your Success – risk management and how to evaluate your project’s success
5. On the QT – Building Quality and Trust into your application

Accompanying each video will be a training manual. Use the manual alongside the video to fill in the blanks as you go along and to complete the exercises. There are music breaks for you to go away and complete the exercises (pause the recording). The training manuals also include templates for you to plan your project activities and budget, as well as to plan for risk and evaluate your project.

This training program is intended to work in real life situations. Hence we recommend (and will show you on the following pages) that you gather information and practice with grants that you are interested in. These grants may be open rounds (with the added bonus that you may wish to use this program to assist with your application) or closed rounds (they may even be grants that recur annually).Is there a grant for you?

# List up to seven ways to generate income funds:

1. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
2. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
3. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
4. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
5. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
6. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
7. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Which is the right source of funding for you?

 \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**What is your idea?**

Write your notes here

**Selecting your grant**

In order to get the most out of this training program, we recommend you visit a website that lists grants similar to the kind of grant you are looking for. Find something that interests you and download (as much information as you can):

1. Guidelines
2. Application form
3. Other information (ie background documents, frequently asked questions FAQs)
4. List of previously successful applicants (if available)

Where to start:

Australia <http://www.business.gov.au/grants-and-assistance/grant-finder/pages/default.aspx>

or other sources by visiting
<http://www.thecommunityentrepreneur.com/grant-sites-australia/>

USA <http://www.grants.gov/web/grants/search-grants.html>
<http://www.grantwatch.com/>

United Kingdom <http://www.fundingcentral.org.uk/default.aspx>

 <http://www.governmentfunding.org.uk/default.aspx>

 <http://www.fit4funding.org.uk/support-pages/funding-sources/funding-from-trusts/>
<http://ec.europa.eu/contracts_grants/grants_en.htm>

Module One

Funder-Mentals

# How to get into the head of your potential funder

## Before you start

Check your eligibility to apply:

|  |  |
| --- | --- |
| **Is your organisation eligible to apply?** | Yes [ ]  No [ ]  |
| **If not:****Will you need an auspice partner?****Or****Will you seek to partner or provide support for an organisation that is eligible to apply?** | Yes [ ]  No [ ] Yes [ ]  No [ ]  |
| **If you need an auspice partner ie someone who is eligible to apply who will be responsible for funds and reporting, who do you have in mind?** |  |
| **If you are seeking to support an organisation that is eligible – who?****What can you contribute?****What will be the benefit to your organisation?** |  |

Five ways to understand what the funder wants:

(listen to the video presentation)

1. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
2. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
3. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
4. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
5. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

## Exercise 1

## **Policy / Outcomes**

In order to understand the context of the grant and the Outcomes that the funding body seeks to achieve, it is useful to read and refer to the Policy statement (if one is mentioned) and to relate your project proposal to the Outcomes the grant aims to achieve. Use this form for brainstorming the relationship between your project and the Policy and/or Outcomes specified in the funding guidelines.

Objectives – what you want to do, actions that lead to goals, targets and purpose

eg to reduce the local unemployment rate by training XX more people for local jobs by (date)
Objectives must be measurable

Outcomes – consequences of the actions
eg XX people found employment locally

XX employers reported satisfaction with the level of relevant skills displayed by the new employees

1. Is this grant linked to a Policy Statement?
Yes [ ]  (continue below)
No [ ]  (go to Question 2)

|  |
| --- |
| **Relevant Policy/Context (if applicable)** |
|  |
| **Policy Objectives that relate to the grant** |
|  |
| **Policy Outcomes that relate to the grant** |
|  |

1. Grant Outcomes

|  |
| --- |
| **Outcomes required by the grant** |
|  |
| **Your proposed project outcomes**  |
|  |
| **Which of your proposed project outcomes relate to any of the Outcomes required by the funding guidelines (what will be the consequences of your project? *Some outcomes can be additional to those required in the funding guidelines, but must include one or more outcome that relates specifically to the funding guidelines)*** |
|  |

**Exercise 2**

**What can/cannot be funded**

1. Brainstorm the kinds of projects that can be funded. What do the Guidelines say? Find out what kind of projects may have been funded in previous rounds. Explore the Frequently Asked Questions:

**Funding Guidelines**

|  |
| --- |
| **What are eligible activities for funding according to the Funding Guidelines?** |
|  |
| **What activities are not eligible for funding according to the Funding Guidelines?** |
|  |
| **What specific activities is the funding body looking for?** |
|  |

|  |
| --- |
| **Does you project qualify?** |
|  |

**Previous Funding Rounds**

1. Is there a list or reference to previous successful projects?

 Yes [ ]
 No [ ]

If yes:

|  |  |  |
| --- | --- | --- |
| **Details of Previous Project(s) similar to yours** | **Amount funded** | **Comments / Ideas** |
|  |  |  |
|  |  |  |

1. Does the current version of the guidelines specify a change of direction/activities that can be funded to previous projects? Yes [ ]  No [ ]

|  |  |
| --- | --- |
| **If yes, what are the implications for your project?** |  |
|  |  |

**Frequently Asked Questions (FAQ’s)**

1. What valuable information is the FAQ’s providing?

|  |
| --- |
| **What information from the FAQ’s is useful for your project?*This list may grow as the FAQ’s are updated – make sure you maintain the latest version*** |
|  |

## **Grant funds**

Understand what grant funds are available and what they can be spent on.

So you’ve read the pre-amble and somewhere there is information about the amount of funds available. Before you go any further, it is useful to unpack what can and can’t be funded:

**Yes No**

☐ ☐ Staff costs (non-recurrent – project specific /not existing j jobs)

☐ ☐ Equipment

☐ ☐ capital costs

☐ ☐ Consultants (some funds expect consultants to be engaged
 – so cost appropriately – get quotes)

☐ ☐ Evaluation (the larger the grant, the more likely that
 evaluation will be included)

☐ ☐ Specific requirements about what can and can’t be funded

☐ ☐ Do you need to provide match-funding (usually you will be
 provided with a ratio eg 1:1 - at least the same amount of
 match funding as the amount of funding requested, or 2:1 -
 half as much is required as match funding as the amount
 requested)?

☐ ☐ Does the match-funding have to include a cash
 contribution? How much? Do we have access to the cash?

## Exercise 3

## **Grant Funds**

1. Can your proposed project be funded elsewhere?
 Yes [ ]  No [ ]
*(If your answer is yes, then you may not be eligible for funding*
2. List the eligible and ineligible items (these are listed in the Guidelines). Additional items may be referred to in the FAQ’s.

|  |  |
| --- | --- |
| **Eligible Grant Items** | **Ineligible Grant Items** |
|  |  |

**Match Funding**

1. Does this funding opportunity require match-funding?
 Yes [ ]  No [ ]

If so:

1. What percentage of match funding is required:
 In-kind ­­­\_\_\_ %
 Cash \_\_\_ %

|  |
| --- |
| **What items should be included as match-funding?** |
|  |

## Is this grant a fit for you? Yes [ ]   No [ ]  look elsewhere

## Exercise 4

## **Timelines**

Timelines are important considerations, whether they be:

* The time available to prepare and submit your funding application
* The timeframe allocated by the funding body for the delivery of funded projects
1. **Key Dates**

|  |  |
| --- | --- |
| **What is the deadline for submitting proposals?** |  |
| **What is the timeline for delivering funded projects?** |  |
| **Does this project have to start before the funded projects start date?*(If yes, then you may not be funded – look elsewhere)*** | Yes [ ]  No [ ]  |
| **Can this project be delivered within the funded projects timeframe?*(If not, you may need to increase your resources, revise what is achievable or look elsewhere)*** |  Yes [ ]  No [ ]  |

1. **Time for submitting the Proposal**

|  |  |
| --- | --- |
| **Do you have sufficient time?** |   Yes [ ]  No [ ]  |
| **Do you need partners?**  |   Yes [ ]  No [ ]  |
| **If so, do you have sufficient time to get them involved?** |   Yes [ ]  No [ ]  |
| **How do you propose to get them involved?** |  |
| **When should you to meet to brainstorm/put together the project plan? *(with or without partners as applicable)*** |  |
| **Do you need to gather quotes?** |   Yes [ ]  No [ ]  |
| **What quotes are required and from where?** |  |

|  |  |
| --- | --- |
| **What is the deadline for gathering quotes?*(Do not leave to the last minute)*** |  |
| **Do you need letters of support?** |   Yes [ ]  No [ ]  |
| **If so, from whom?** |  |
| **What is the deadline for gathering quotes?** |  |
| **Have you put together a calendar of dates or task schedule around this process?*Recommendation – use an online calendar with reminders*** |   Yes [ ]  No [ ]  |

**Exercise 5**

1. **Project Resources**

|  |  |
| --- | --- |
| **Do you have access in-house to the personnel/expertise to deliver the project within the required timeframe?*Consider day-to-day workloads and other projects or priorities*** | Project Manager Yes [ ]  No [ ] Project staff Yes [ ]  No [ ] Administration Yes [ ]  No [ ] Volunteers Yes [ ]  No [ ]  |
| **If not, do you have access to external expertise to deliver within the timeframe?**  |  Yes [ ]  No [ ]  |
| **What external expertise will be required?** | Consultant [ ] Specialist contractors [ ] Agency staff [ ] Project staff [ ] Volunteers [ ] Technician [ ]  Other [ ]  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  |
| **Is any of this expertise available through your partners?**  |  Yes [ ]  No [ ] *If so, what/who:* |
| **What physical resources do you have to carry out this project within the timeframe?**  |  |
| **What additional physical resources do you need to carry out this project?** |  |
| **Which of these resources can be purchased using grant funds?** |  |
| **Which of these resources cannot be purchased using grant funds?** |  |

## **Exercise 6**

## **Organisational Capacity**

1. Does our organisation have the capacity to deliver the project?

|  |
| --- |
| **What implications will this project have for your organisational Policies and Procedures?** |
|  |
| **How does your Committee/Board have access to the appropriate skills and knowledge to provide strategic support for this project?** |
|  |
| **What risks are there to the organisation through this project?** |
|  |
| **Is there potential for this project to take over the focus of the organisation? What can you do to manage this risk?** |
|  |

**Funder-mentals Summary**

In this module, we have covered the must-do tasks to find the right grant for you by covering:

* Understanding of funding body objectives and outcomes?
* Understanding of how your proposed project’s objectives and outcomes assist in achieving the funding body objectives and outcomes?
* Review and understanding of the project guidelines – what can be funded?
* Timelines for application are achievable?
* Project timelines are achievable?
* The organisation is eligible to apply for funding or can work under an auspice/partnership arrangement?
* The organisation has the capacity to manage, monitor and deliver the project?

So you think you know what your funder wants, let’s look at putting your proposed project plan together in module 2