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25 Tips from 25 Years of Grant Seeking Success

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Presented by Michael Paddock, Chris LaPage, Shannon Day, Dr. Elizabeth Shay, Ashley Schultz, and Elizabeth Evans • Grants Office, LLC

Welcome and Introductions

Michael Paddock:
Hello, everyone, and thanks for joining us for “25 Tips from 25 Years of Grant Seeking Success.” I'm Michael Paddock, CEO of Grants Office, and I want to welcome everyone to today's session. We've got a jam-packed session for you today. As most of you may know, we are celebrating our 25th anniversary here at Grants Office, and as we reflected on what we've seen and what we've experienced over the past 25 years, there are a few tips that keep coming up — things that we keep exploring and keep talking about. So we wanted to distill that down for you today into 25 tips from our 25 years. Our focus is not so much on us and our 25th anniversary but on you and what you can do to map your path forward in 2026.

I am joined by the Grants Office dream team today. We've got Chris LaPage, Chief Services Officer here at Grants Office; Shannon Day, Senior Grants Development Consultant here at Grants Office; Dr. Liz Shay, also a Senior Grants Development Consultant; Ashley Schultz, Manager of Community Engagement here at Grants Office; and Elizabeth Evans, Manager of Research and Consultation here at Grants Office. A great team of very experienced grants professionals who are going to be sharing with you some of the things that we've learned, some of the things that we've come to understand, and just sort of experienced over the years.

Today's Agenda

Michael Paddock:
We've got several things we're going to be talking about. Each of the presenters will be taking a part of this. We'll talk about understanding the funding landscape, finding and selecting the best-fit grants, building comprehensive projects, fostering collaboration, and submitting quality proposals. I think as you'll see when you look over this agenda, the actual process of writing the proposals is only a relatively minor part of the overall process of grant seeking.

That's because advanced grant seeking, or really successful grant seeking, has a lot to do with what you do off the page in terms of developing your project, in terms of finding the best funder to apply to, and in terms of building collaborations that are meaningful and fully integrated with all the different people

that are going to be involved in ultimately rolling out your project. So I would ask you to keep that in mind as we go through today: basic grant seeking is just following the directions that are provided by the funder. Couldn't be simpler — it's not rocket science — and that'll get you about halfway in grant seeking success. But the other half has a lot to do with what happens off the page. So a lot of that is what we'll be talking about today. As I said, we have a lot to talk about, and with that, I'm going to turn it over to Chris LaPage to get us started. Chris?

Understanding the Funding Landscape

Chris LaPage:
Thank you, Michael. By way of introduction, I'm Chris LaPage, Chief Services Officer at Grants Office. I work closely with our team to ensure we're providing the best service possible to our clients in addition to developing new partnerships. I found my way to grants initially as a teenager on the funder side, actually, when I served as Chief Financial Officer for a local chapter of Youth as Resources. Our local community foundation managed a fund that allowed our youth group to disperse and administer grants for community improvement projects. So I understood from a young age the impact grants can make in communities.

I went on to a career in healthcare where there were a lot of great ideas but very little funding. In those roles I leveraged grants to get critical initiatives funded. And for the past 16-plus years, grants have been my life here at Grants Office. With that, let's get into today's content. I'm going to provide some advice and tips around understanding the grant funding landscape — a critical first step in your grant seeking efforts.

Tip 1: Identify the Funders

Chris LaPage:
Any discussion on the funding landscape must start with identifying the funders, and where better to start than the 800-pound gorilla in the arena — or in this case, the $800 billion-plus in grant funding that is available each year through the federal government across 26 grantmaking agencies. Each of these federal grantmakers has their own interests and priorities and programs they administer. Most grants end up flowing to public sector agencies and not-for-profit entities.

In addition to managing some federal grants, states budget for and administer a variety of programs through their various agencies and instrumentalities. Of course, the landscape varies widely across states, both in terms of the amount of funding available and the number of grant programs they offer. Foundations can be an excellent source of funding, particularly for not-for-profit organizations. Foundations may give grants across the country, focus on particular states or regions, and in many cases

concentrate their giving in specific counties, cities, and even neighborhoods. Knowing these sources of funding is critical to create an effective and efficient grant seeking operation at your organization.

Every grant seeker is unique in terms of the resources you have available, your mission, and the populations you serve. In order to be successful with grants, you must align your organization's initiatives with the funders that share the same priorities. In other words, you don't propose a project that serves metro New York City to the U.S. Department of Agriculture that focuses on improving rural areas. In addition to priority alignment, there's the question of time and resources. Knowing the complexities of federal funding along with compliance and reporting requirements, an organization that is relatively new or lacks the resources to fulfill those elements may want to focus their efforts on local and regional foundation grant opportunities. Of course, never hesitate to reach out to us here at Grants Office. We help everyone from small not-for-profits to large public agencies realize their grants funding potential.

Tip 2: Understand How Grant Money Is Allocated

Chris LaPage:
Just as important as knowing where to look is understanding how grant money is allocated. Most people just want to get their hands on the money. They pay little attention to how the funding is dispersed. Understanding grant distribution mechanisms is crucial because it dictates how you apply, what criteria you meet, and how you manage the funds. It prevents wasted effort, ensures compliance, and increases success rates by aligning your project to the proper grant programs.

One major distinction is direct versus pass-through funding. Many times, states are in the position of administering federal grant programs. This is known as pass-through funding. Meanwhile, in cases of direct funding, the applicant applies directly to the funder to receive the money. In order to realize the grant money, you need to understand where your organization fits in the flow of funding. I once worked with a sheriff's office that tried to apply for a federal Department of Justice program, only to discover that funds were administered by the state, passed down to the municipality, before reaching the law enforcement entities. The project did align perfectly, but their entry point was wrong. Until they engaged with us, they didn't understand what went wrong. They lost valuable time, and they soured on grants. That's obviously not a good thing when there's plenty of funding for their projects available.

Another major distinction is formula versus competitive grants. You can make a brilliant and compelling narrative case to fund a particular project, but it may mean very little if the funding is based on methodology or formula — such as county population, low-income students, or uninsured patients — and you don't meet that criteria. Or you can have a situation where people hear it's a formula-based program and assume the money's going to magically show up in their bank account. There's generally still a formal application process that must be followed to access the money. Competitive programs are

generally scored based on a rubric or a set of criteria. In these cases you are competing alongside other organizations, and it comes down to what makes the most compelling case for funding. How well did the applicant explain the need for funding? The resources they'll use to deploy the project? How will they measure success? Liz will be providing some tips in this area in a little bit. The bottom line is that as an organization, you want to be sure you have a project and proposal for funding that will stick out among other applicants.

Tip 3: Track Federal and State Budget and Appropriation Processes

Chris LaPage:
So you understand where to look and how the money flows. How do you figure out what's coming down the pipeline in terms of grant funding? At their core, grant programs are designed to fund projects that solve problems. At the federal level, there can be a lag between something becoming a problem and the allocation of money to address it. I'll use the opioid epidemic as an example, where politicians and communities expressed concern and identified it as an issue for more than a decade before serious federal dollars were made available starting in 2017. In other cases, as we saw through the COVID pandemic, the federal government can move quite swiftly to tackle critical issues.

Knowing the federal and relevant state budget and appropriation process is a critical step to tracking these policy and funding trends. Ideas on the campaign trail or that you hear in a presidential State of the Union or a governor's State of the State address eventually can turn into actual policies and funding programs. There are a lot of steps along the way, and it's just as important to know what not to pay attention to as what you should focus on. You may hear that such-and-such program is being cut, but it's only the president's budget proposal, which is merely a first step and a suggestion to Congress, and generally not reliable in predicting the actual budget that will ultimately be signed into law.

As each chamber of Congress — House and Senate — develop their own separate budget bills, there's a lot of news that will note that this program has been cut or this new funding is going to be available. It can be hard to sift through everything and figure out what's real and what's not. One thing Congress loves to do is authorize a certain stream of funding, which is little more than saying they intend to fund something. It's great information to track, but it's not real until appropriations are made. Long story short, this is a complex process, and the most important thing is what is signed into law at the end. I will note that if you are going to follow anything, the bills that come out of the Senate tend to be closest to the final product. This is because the rules of the Senate require bipartisan support, and this generally leads to moderation. It's one of the reasons the federal grant funding landscape remains so consistent over time regardless of which political parties are controlling the levers of government.

Part of this tip is simply a message to not stress out. Don't live and die by each sound bite you hear on the news about grant funding. This is what we do at Grants Office. We track this complex process. If you

work with us, we will track steps one through four, keep you updated along the way, and make sure that you know what's coming once the appropriation bills are signed into law.

Tip 4: Get to Know the Funders and Their Motivations

Chris LaPage:
Once you have a sense of what's coming, it's time to consider putting your best foot forward, which requires getting to know the funders and their motivations. If you're familiar with grants at any level, you know the Request for Proposals, or it might be called the Notice of Funding Opportunity, Notice of Funding Announcement, solicitation — whatever you want to call it, it's your guide to ensuring you develop a compelling, competitive, and compliant proposal, what we call the three C's of a successful proposal. But as Michael mentioned, that's really just one step in the process. There's a whole lot that goes into it from beforehand. These RFPs don't exist in a vacuum. They're put out by the funder, as has been said multiple times, to solve a problem or address an issue.

For federal and state funders, what is the mission of the specific grantmaking agency — Department of Health and Human Services, Department of Justice, Housing and Urban Development, their analogous state agencies? What are they set up to do? What are the goals of the current presidential or governor's administration when it comes to that agency's focus? If you're applying to the U.S. Department of Health and Human Services, you should review their Healthy People 2030 plan. Weave their priorities into your project and proposal, always keeping the RFP front and center. That plan will give you insight into themes and priorities you should incorporate, such as social determinants of health — transportation, childcare, access to healthy food — that affect healthcare, and specific conditions and chronic diseases they're prioritizing: obesity, diabetes, heart disease, and stroke.

For foundations, look into its history: who founded it, started it, why? In many cases there's a personal story, something you can tap into as you make the case for why they should care about your project. Review their annual reports and get a good sense of who they give to. Don't just rely on generic eligibility guidelines you find on their website.

Finally, turn your needs into a grant-fundable project — in other words, stuff the funder cares about. Not every need you have on its own accord is going to be of interest to grant funders. You may have a need for video conferencing equipment because your organization has 20 sites and you lose time traveling between meetings. That's not a compelling reason to a funder. But if you can use video conferencing technology for distance learning or telemedicine, which directly impacts patients or students and improves educational or healthcare outcomes, those are the building blocks to developing a grant-fundable project. The key takeaway here is: you can't know too much about the funders.

Tip 5: Make Grant Seeking Part of Your Strategic Plan

Chris LaPage:
Shannon's going to dive into some additional tips for finding and selecting the best funders and grant programs in a moment, but first, one last tip from me. Understanding the grant funding landscape means you have a sense of the funders that are out there and what they're interested in funding. Knowing where funding exists can help you determine what you should budget for, know there are no grants for certain things, and where you might be able to find external funding. Knowing the landscape may help you determine how you set up your strategic plan. When there's a lot of grant money available for an important initiative, you might be able to get that new site set up in three years instead of seven.

Building a sensible grant seeking strategy means incorporating your grant seeking plan into your overall strategic plan and budget process. One informs the other and vice versa. You just don't go after every grant available and see what sticks. Your grant seeking efforts should be guided by your long-term vision as an organization. Where one organization may have the resources to target a hundred grant programs in a year, another may have their hands full with five. You can always build additional capacity down the road, as there's no better way to convince decision-makers at your organization to devote more resources to your grants operation than having success and securing external funds.

To summarize the key points: you know where to go for funding, you understand how it's distributed and your entry points, so to speak. You learn as much as possible about the funders and their motivations, including tracking relevant funding trends. And you make grant seeking an integrated component of your strategic and budgetary planning process. Now Shannon is going to dive into some tips to help you find and select the best grants to pursue. Shannon, take it away.

Finding and Selecting the Best Fit Grants

Shannon Day:
Thank you, Chris. And hello, everyone. My name's Shannon, and I lead our state and local government and community services team here at Grants Office. I came to grants via a pretty circuitous route that started after I graduated college, but that was a long time ago, so we're going to fast-forward a little bit. I was finishing up my master's degree in library and information science. I only had my internship to go when COVID hit, and COVID shut everything down, including the museum in which I was doing my internship. Fortunately, the school pivoted to a grants class so we could graduate, and that led to my career move from public safety into being here at Grants Office. So that's a brief history of my introduction to grants.

We're going to cover some tips for finding the best-fit grants for your needs, now that Chris has laid the groundwork on the sources and types of grant funding.

Tip 6: Be Specific in What You're Searching For

Shannon Day:
If you set out searching for, say, “grants for fire departments” on your preferred search engine, whichever one that is, you'll be inundated with results that may not work for you. Rather than trying to drink from that fire hose — very much intended — be more explicit in what you're searching for. There is a sweet spot between casting too large a net and being too specific. So ask yourself some filtering questions to narrow your focus.

Think about the source of funds. Are you searching for federal, state or local, or foundation grants? The application process, reporting requirements, etc., are going to vary greatly by source. What is your funding purpose? Are you trying to find grants specifically for equipment like SCBA or a fire truck? Are you looking for personnel — are you looking to hire or train? Or are you looking for programs like community outreach programs? Also look for your organizational or geographic fit. What's your location? What is your community? What is your organizational makeup? Many grants are geographically restricted or prioritize specific organizational structures.

For example, instead of “grants for fire departments,” you would try “New York State grants for volunteer fire department equipment.” That will narrow down your results.

Tip 7: Check Funder Websites Directly

Shannon Day:
Directly checking the websites of major grant funders is an excellent targeted strategy. Government agencies are often the largest and most consistent sources of funding, as Chris mentioned. They usually post their priorities and their opportunities. Many state agencies also administer federal pass-through grants.

So think about who your main funders will be. If you're a K–12 or a library, check your state's Department of Education. If you're public safety, check your state's Department of Public Safety, Emergency Management, Homeland Security. For infrastructure, look for state Departments of Transportation or environmental agencies. Departmental names may vary slightly from state to state, but the principle remains the same: go directly to the source that aligns with your mission. And also think creatively. You can start with the obvious state agencies, but there may be opportunities from other agencies as well. I often find grants through a state's Department of Commerce or through their Attorney General's office. So think creatively about where you're searching for grants.

Tip 8: Join Email Subscription Lists

Shannon Day:
Joining email subscription lists is invaluable and very time-saving, because you all have a job to do, and you may not always have time to search for grants — so let them come to you. For federal funding, Grants.gov is the main portal for federal funding. They have a great email subscription that lets you track funding opportunities by agency, by category, or even by keyword. Also, many state funding agencies, community foundations, and regional organizations like councils of government offer email or newsletter subscriptions. So sign up for those — they will send you alerts about new programs, application deadlines, funding changes, webinars, etc.

Tip 9: Leverage Specialized Tools and Expertise

Shannon Day:
To streamline your search process and discover a wider array of funding opportunities, you can leverage specialized tools and expertise. There are several search platforms available, including proprietary tools such as our own Grants Office Communities. These platforms aggregate thousands of opportunities and provide advanced filtering options, so you can filter through the chaff to get to the wheat. You can also consider working with a grant professional or a consultant who are experts in navigating the grant landscape. They have access to high-end search platforms, and they can help expedite the process of matching your needs to the best funding sources. This can often be the most efficient way to discover those hidden gems that you wouldn't come across in your own searches.

And finally, your local librarian — yes, I am very pro-librarian. They can help. Librarians are master researchers. So head to your local public library and pick their brains. They can help you.

Tip 10: Confirm You Can Meet Application Requirements

Shannon Day:
Once you've found a potential grant or grants, you'll want to make sure you'll be able to apply for it. Very important. Skim for the basics. Most federal grants have been redesigned to include quick summary info at the top, or even some of them include separate one-pagers with just the facts like due dates, eligible applicants, project categories, etc. So look for things like the application timeline. Is the grant due in three days, three weeks, or three months? Be realistic and don't take on an endeavor that will completely burn you out or be unattainable. You may initially think a grant you found is a perfect fit, but when you take a closer look, it may not be. Also, pro tip: Control F is your friend. If you know it, you love it.

Tip 11: Confirm You Can Meet Post-Award Requirements

Shannon Day:
After you've determined that you can meet the application requirements, you want to ask yourself if you can meet the post-award requirements. I think everyone on our panel today has worked with an organization that put so much effort into developing a beautiful, winning grant application only to discover they can't accept the award because they can't meet the funder's post-award expectations. It helps if you go into your grant endeavor thinking of the grant as an investment in your project, and the post-award is when the funder gets their return on that investment. Many grants will differ in these post-award requirements. Federal and state grants are usually the most intensive because they're funded through our taxpayer dollars. You might want to build post-award management costs into your budget if the grant allows it, and depending on your organization's grant seeking volume, it may even make sense to have a full-time grant manager on staff. Just make sure you're not skipping this vital step in your evaluation of the grant.

Tip 12: Dig Deeper Into the Funder's Priorities

Shannon Day:
As Chris mentioned, I'm going to echo what he talked about earlier regarding digging deeper into the funder's priorities to ensure their goals align with your own. This is a valuable additional step in evaluating the grant fit. If the information is available, take a look at who and what the grant has funded in the past to see if those projects align with your own. Don't be afraid to reach out to folks to talk about their experience applying for the grant. Generally, when we're thinking about grants, people want to talk about their experiences — unless of course they're competing against you, then they won't want to talk about it. But don't be afraid to call people and ask about how it was for them.

If, after you've performed all the previous steps, you feel like you're trying to connect too many dots between your project and the grant's purpose, or you're twisting yourself into a pretzel just to try to make it fit, don't be afraid to start over. You don't want to spend your very valuable time applying for a grant that you know deep in your heart just won't work for you.

To recap, this is not a linear process. This is not a one-time endeavor. Effective grant seekers incorporate searching and researching and applying for grants into their regular routine rather than treating it as a one-time task. As you gain that initial experience utilizing these search tips, the process becomes much easier over time. Once you determine that a grant is a good fit, it's time to move on to the next steps, and with that, I will turn you all over to Liz. Thank you.

Building Comprehensive Projects

Dr. Elizabeth Shay:
Thanks so much, Shannon, and hello, everyone. My name is Liz Shay, and I am Shannon's counterpart — another Senior Grants Development Consultant here at Grants Office. I lead our education team, and my consulting is in the higher education and research spaces. I've actually been involved in grants in some form or another for essentially my entire life — from being a kid collating copies back when you had to mail 20 copies of your application to a potential funder, all the way through being a grantmaker in various roles, much like Chris has been. And then during my PhD program and after that, realizing that developing projects and being able to articulate those projects to potential funders is actually my favorite part of the process rather than doing the research itself. Therefore, I am now in the grant space full time, getting to do that all day, every day with various organizations that we work with.

In terms of my section for today's conversation, I'm going to be talking about building comprehensive projects. This is super important because thinking through all these details is what's necessary to make sure that you can have everything you need for a potentially competitive proposal.

Tip 13: Craft an Effective Needs Statement

Dr. Elizabeth Shay:
To start out with, I want to talk about crafting an effective needs statement. The needs statement is likely going to have multiple versions over the course of your project planning. It might have a two-sentence elevator-pitch version that you use when you talk to potential funders and partners in casual conversation, a one-page version that you use as you're starting and prioritizing projects for grant seeking and doing initial searching like Shannon has been talking about, and a longer version that becomes a foundational component of your written proposal. All of these things are ultimately telling people, including the reviewers, why they should care about your project.

There are three main components to an effective needs statement. The first is the need. This is about the gaps that your organization is facing and that you are seeing in your community. Think about also the data — that's a super important part of this. How can you contextualize that need for somebody who's not familiar with it? It could be data that you have internal to your organization. For example, you might know that you're turning away 50 potential participants in your services every month because you don't have capacity. Or it could be external data that comes from a reputable third party. For example, if you have a workforce development project that you're working on, the Bureau of Labor Statistics might be able to give you information about the need for that particular industry within your community and making sure that you have trained workers in your area.

The next component of the needs statement is the solution. This is about what you're going to do to make sure that the need is met. This is about your project, in essence, and the activities that you will be

doing. And then finally, there's the impact. Think about who's currently being affected by the need and who is going to benefit from the solution. Hopefully there's a lot of overlap between those groups, since that's why you're doing the project. But also think about the larger context that you're working within. Are there similar needs that other organizations have that your project could affect? It could be direct impacts where you are able to help meet the needs in the community as a whole through your work that helps other organizations as well. But it could also be indirect impacts. Are you developing a programmatic approach that other organizations could adapt and replicate within their own communities? Think about all these things as you're developing your needs statement, and know that the needs statement is the foundation of your project, so you're likely to return to it regularly as you develop other components.

Tip 14: Quantify Your Activities to Identify Your Goals

Dr. Elizabeth Shay:
The next thing to think about is quantifying your activities to identify your goals. Goals should reflect the activities that you're doing and vice versa. Make sure that you're really considering what's realistic for the time period you're looking to work within and the resources that you have or are proposing as part of a project. It's important to make sure that you're not trying to do something that you know will be impossible. For example, in most instances, if you're developing a curriculum in innovation and implementing it in a class, it's unlikely you're going to have 100% completion, so you might need to think about what is actually realistic for your particular situation.

You also want to think about if the particular grant that you're considering for this project has any specific goals listed in the guidance or elsewhere in the project and program materials. For example, an education grant may have something that says all projects funded under this grant must serve at least 100 students. Make sure that your goals align with the goals that are required for the particular grant program. Even if there's nothing specific in the guidance for the goals, go back and look at the priorities of the funder, just like Chris and Shannon have been talking about, and make sure you see clear alignment between your goals and the grantmaker priorities. If you don't, don't panic, but it might also be a good time to revisit your grant selection and do that iterative process that Shannon was talking about to refine what makes the most sense to apply for.

Tip 15: Use Logic Models Strategically

Dr. Elizabeth Shay:
As you start to work through all of your details in even more detail, you want to think about using logic models strategically. I know not everybody on this call today is familiar with logic models, and I'm not going to cover all the details during this time today. We do have other resources, including the one referred to on the screen. But logic models are a powerful framework to ensure you're considering

every component of your project and how they all work together. They're really useful for developing all the details that you're going to need.

As an example to help understand logic models, I'm actually going to step back from the grant space for a second and think about cooking. When you think about cooking, you have some inputs. This is the stuff that you're going to use for the project — things like raw ingredients, kitchen tools, somebody with expertise. You then move into the activity stage, and this is what you're actually doing for your project — things like chopping, mixing, baking, or whatever that might look like in your cooking project. Next you have your outputs, which are the results. In the case of cooking, it's a dish or a meal. And then for your outcomes, you're thinking about the impact — for example, a full and happy family at the end of dinner.

Logic models are an extension of the needs statement you've already developed. You're able to break down some of the aspects of your project into further detail, and you can see connections — for example, between activities and goals like I was already talking about, but also the synergy all the way across your project, from the inputs at the beginning to the outcomes at the end.

Tip 16: Build a Detailed Project Plan

Dr. Elizabeth Shay:
Now that you have a needs statement that demonstrates the why of your project, and your logic model has been built out with what you're doing and what you need to do it, as well as some of the details about who will be involved and where activities will happen — the project plan builds on these components and ensures that you have every detail of the project: the who, the what, when, where, why, and how. Basically, a project plan is a step-by-step implementation guide for your project. This enables you to hit the ground running when you have the funds in hand, but it also gives you all the details that you're going to need as you start to develop applications. There might be more details in your project plan than what you're ultimately going to put in an application, but that well-developed project plan will mean that you are able to clearly demonstrate that you're ready to implement the project because you are — you've thought through all of the components.

Grants Office Communities is a great place to develop and document your project plan. Ashley's going to talk about that in a little more detail later, but the key part of building a project plan is to break down every detail to at least the monthly level. If you have a shorter project, say six to twelve months, you might even want to break it down into shorter time increments than that. But the goal is to make sure you have every piece in place and have considered the who, what, when, where, why, and how.

Tip 17: Build a Well-Crafted Budget

Dr. Elizabeth Shay:
As you know those pieces, it's also important to know how much it's going to cost. So you want to think through all of these components. If you forget something when you start to craft your budget, if you get funded, you might have to fund it yourself. Also, it can create doubt in the mind of the reviewer about whether you're prepared. So building a well-crafted budget demonstrates your capabilities as an organization to be good stewards of grant funds, so it's a super important component of your project.

Return to your logic model and your project plan and capture everything that you're going to need. So this is things like people, equipment, supplies, travel, and other project components. Get quotes and product or service descriptions to ensure that you have accurate numbers in your budget now, and also the information that you need to incorporate into an eventual budget narrative component like Elizabeth's going to talk about in a future section.

In summary, building comprehensive projects is the key to being prepared for the grant application process as well as the eventual implementation of your project. So super important to think through all of the components and make sure that they all work together. And with that, I'm going to pass things to Ashley to talk about fostering collaboration. Thanks.

Fostering Collaboration

Ashley Schultz:
Hello, everyone. My name's Ashley. I'm the Manager of Community Engagement here at Grants Office. That means I have the pleasure of working with the subscribers to our new platform, Grants Office Communities, as they build out their projects, find new grants, and submit proposals. I also work with the software development team that sits behind Grants Office Communities, and I help them give our platform a little more polish and then roll out even more features for our subscribers.

I found my way into grants while working at a city planning office in rural Indiana. The city planning office, they were really great at getting grants. They got them for parks, they got them for bike lanes, they installed free downtown Wi-Fi. They totally renovated the exterior façades of their business district with grants. Working in that space, I really couldn't help but become addicted to all things grants. Even today, I still particularly love everything that they can enable for small, particularly underfunded communities.

I'm talking to you about collaboration and grant seeking. Elizabeth has a tip later about building a grant seeking team, meaning those folks within your organization who are going to be contributing to your project. But my part here is more about external collaborations. This is folks inside your community or folks who are working adjacent to you in your field who are being written into the grant because they

have a valuable contribution to make. In our opinion here at Grants Office, people really don't build enough partnerships. Grant seeking is an inherently collaborative effort. You may think that you as a local government are going at it alone in some downtown beautification process, but you're pulling in local artists to paint murals. You're pulling in a local greenhouse to donate planters. You're pulling in the public works department to repaint the bike lanes. You have essentially built yourself a collaborative project.

So my tips today are all about recognizing when collaborations are happening and then identifying ways to not only make them stronger but also how to effectively relay those partnerships into your grant proposal.

Tip 18: Decide When and How Partnerships Enhance Your Project

Ashley Schultz:
First and foremost, decide when and how partnerships are going to enhance your project. Like I said before, we at Grants Office are constantly encouraging folks to build partnerships into their proposals. One of the things this allows you to do is increase the number of funding opportunities that are available to you. If you have two distinct organization types who are looking for funds, by all logic you have effectively doubled the number of grants that are available to you.

Collaborations also give you access to skill sets and expertise that you may not have readily available inside your organization. School safety projects, for example, can be enhanced by participation from your local law enforcement agency or your local emergency management personnel. These are folks who know the best places to position security cameras. These are folks who can advise you on lockdown procedures. These are also folks who can make sure you're buying radios and communication equipment that connects with their own so that you can all be in communication during an emergency. You don't have to have that expertise inside your building — you just have to know someone in your community who does and then bring them in with you.

Next, we do see some funders out there actually give priority consideration to applications that include partnerships. They're either going to explicitly state that in their scoring rubric — “hey, we're going to give proposals that come in with partnerships five extra points” — or those extra points are going to get distributed throughout your score in a more informal manner. Since your project is well thought out, it's leveraging the expertise of others, and it's got a very smart partnership attached to it, you're going to come in with a stronger proposal anyway, and you're likely going to be awarded at a higher score, even if that funder is not explicitly stating that they're giving extra points for partnerships.

Last but certainly not least, there's also an economy of scale to consider. We see this happen most often with grant seekers who are clustered in a particular geographic region. If, for example, most of the fire departments in your county are using outdated radios, why not try to submit a single grant application

together? You can all be on the same exact system — you know your communication system is interoperable — and then you also get a 10, 20, or 30% discount from the vendor for buying from them in bulk.

Tip 19: Select a Good Partner

Ashley Schultz:
Next is knowing how to select a good partner. Now, a good partnership is great for grants, but a bad partnership can really suck the positive energy out of a room. When you're looking for a good partner, the first place to check is the people you already know. These are folks who have already proven themselves to you. They know you, they know how you work, and they're going to be able to hit the ground running with you. If you work in a larger organization, don't forget to expand that reach and ask outside of your department to see if maybe some of your peers have some recommendations for partners they have also already worked with.

If you do have to go out there looking for new partners, make sure they complement your efforts. Make sure you have similar goals, similar interests, a similar geographic footprint. That way no one group is having to make a substantial change or extend their reach just to make the project work. And last — and this seems like an easy one, but it's really not — make sure they have time for you. Be honest with them up front about what you need from them, how much you need from them, and what sort of timeline you're working on. And don't get that nod of confirmation just from your friend or from your existing contact at the organization. Make sure that person's boss, and that person's boss's boss, knows what they're committing to as far in advance as possible.

Tip 20: Bring Your Partners On Early

Ashley Schultz:
To that end, bring your partners on as early as possible. First and foremost, if you are truly leveraging the expertise and the skill sets of your collaborators, then you want to have them with you at the table every step of the way. If you bring them in too late, you could severely limit your ability to adjust your grant budget or rebuild your project from the ground up if they have substantial edits for you. We worked with a lot of city and county IT professionals, for example, who have police departments who will go out and win a bunch of body-worn camera gear but never actually consult their IT team on things like storage requirements, Wi-Fi connectivity, or any other ancillary items that you need to effectively deploy a body-worn camera. So if you are relying on the experts and all other skill sets, make sure you bring those folks in early so you can gain the most from their knowledge.

In that same vein, bringing those partners in early is going to increase their buy-in. They believe in the project because they have been at the table with you building it from the very beginning. They see what

success could look like, and they are substantially more committed to being good partners to you and helping you achieve your goals if they've been there the whole time.

In a less rosy way, everyone's least favorite part of this is going to be the bureaucracy. I mentioned before that you should get approval of the boss's boss's boss. For a public sector organization, this is often going to need going to board meetings and council meetings. When I worked in that small town in Indiana, you had to present your grant application to the board twice at two consecutive meetings. They were only held once every two weeks, and you had to get on the agenda like eight days in advance. So this meant we needed to add an entire month and a half to our grant application calendar just to get administrative approval in order to submit it. So if you add more organizations to this mix, it's only going to increase those requirements. Make sure you're aware of what your partners will need and what sort of timeline they will need to work on if bureaucracy is going to play a role in their participation.

Tip 21: Document Your Partnerships

Ashley Schultz:
Bureaucracy leads me to my next tip of documenting your partnerships. You can document your partnerships in one of two ways. The first is a letter of support. This is very informal — essentially a thumbs-up for your project. “We are a local business; we think the idea of the government seeking money to beautify downtown is a really great idea.” That's a letter of support. It's typically written on that organization's letterhead. It's often just one page. It's often signed by a high-ranking person in that organization. Many of you who have been grant seeking before are aware of these letters — you usually end up attaching three, four, five, six of them to the end of your application, particularly federal ones, to show broad community support for what you're trying to get done.

The alternative is a Memorandum of Understanding, or MOU. You might see MOA. This is a formal, legally binding agreement to work together. It's often drawn up by lawyers. Instead of it being a letter, it's written in legalese. It explicitly spells out who is doing what, what money is being exchanged, how staff time and resources are being allocated, et cetera, et cetera. From a grant funder's perspective, MOUs are substantially better than letters of support. They're more engaging, they provide more details, and they give funders more confidence that this partnership is legitimate and that this partnership is going to be successful.

But again, reminding you of those bureaucratic components, MOUs take substantially more time and effort, particularly when you consider the fact that a legal team has to prepare it and then it has to be signed by two high-ranking officers inside your organizations. So MOUs are better in any case if at all possible, but they are going to take a lot of time. In many cases we've seen MOUs be the first thing that an organization starts in their grant seeking process and one of the last pieces that they submit before they go close to it.

Tip 22: Commit to Each Other

Ashley Schultz:
My last tip to you on collaborations is just to commit to each other. I say this in the formal sense of making regular stakeholder meetings and establishing mutual expectations, but also in the informal sense. For example, in today's digital world, it's important that everyone has access to current versions of your proposal narrative, your budget, your timeline. If you lack that information, you can feel like you're on the outside looking in. So be sure to establish a shared digital workspace so that all of the people inside your organization and all of your external partners not only feel involved but can also be involved.

Another informal way to commit to each other is to celebrate your victories together, even the small ones. Tag each other on social media posts, send some baked goods to each other. I'm chatting with you here today right before the winter holiday season, so I would suggest sending them a card. Anything that you can do to express your appreciation for your collaboration is going to serve you well. It will cement your existing partnership and ensure that you're going to continue working well with each other well after the grant funding is gone.

Now I'm going to pass things off to Elizabeth for our final five tips of today's session. But if I leave you with any one thought today on partnerships, I hope it's just to try them more. As you identify gaps in your grant seeking strategy or as you feel yourself overwhelmed by just the sheer amount of knowledge or the sheer amount of steps that are needed to successfully implement a grant, I hope you consider an external collaboration and consider that to be the answer you're looking for. So I'm going to pass things over to Elizabeth now. Thank you so much.

Submitting Quality Proposals

Elizabeth Evans:
Thanks, Ashley, and hi, everyone. My name is Elizabeth Evans. I am the Manager of Research and Consultation for our U.S. and Canada operations here at Grants Office, and I support an amazing team of project development consultants and funder prospecting researchers in the work that they do to help our grant seeking community. I've been with Grants Office going on twelve years, but I originally found my way to grants all the way back in 2008 when I was working for the Chicago Public Schools Department of Homeless Education as an AmeriCorps VISTA.

A lot of the work that we did there was regularly funded through things like the Elementary and Secondary Education Act and state funding from ISBE. But then came the American Recovery and Reinvestment Act of 2009. So my little world was opened up to the flood of stimulus funding and all that learning that went along with navigating that. And of course, since the department ran an after-school

program that we later established as the nonprofit Chicago HOPES for Kids, I also had ample opportunities during my time to work on applying for and managing foundation grants as well. Since then I've done a lot of other things in the grant space, but that's where I got my start.

Let's jump into it. I'm here to talk to you today about submitting quality proposals.

Tip 23: Plan Your Proposal Development Process

Elizabeth Evans:
To start out, I'd like to say that in order to have a quality proposal, you have to intentionally plan for it, because even if you have a dedicated grant writer, it's still going to take time to prepare for that quality proposal — both theirs and yours. And I should clarify, planning that you need to do for this quality proposal is not the same as your proposed project's plan, but rather planning for how you're going to go about handling the proposal development process itself. These things can be done simultaneously — building the airplane while flying it, as they say. Sometimes project details or plans may not be finalized until you're pressed to commit that decision to paper, and that's okay. But savvy grant seekers are going to realize and recognize that planning the project and the process for proposal writing and submission are two distinct activities. It's always going to be way less stressful if you're approaching the planning process with intention and plenty of time to do that work.

To start, it's important to make sure you have one person that is going to be steering that ship. This avoids the distributed responsibility issue where nothing is being accomplished because everyone assumes someone else is on it. Whoever is selected as this project manager will be the one setting things like meeting agendas, confirming who is responsible for what tasks, following up to ensure actions are progressing, and ultimately driving your proposal development efforts forward through their leadership and coordination of others.

You're also going to want to agree on how everyone involved is going to be communicating important project-related information. Is it going to be predominantly done during check-in meetings, or via email, text messages, messaging on communication platforms like Teams? You can reduce stress by streamlining the flow of project-related information to a few preferred channels rather than having to run between communication networks. And speaking of check-in meetings, determining ahead of time the purpose of each meeting — planning or brainstorming, decision-making, using it as a working meeting to actually write the proposal, or even just providing progress updates — is really important to make sure everybody has a clear idea of what their purpose is in that meeting and what's on the agenda, to avoid frustration from all of the different players at the table having conflicting goals for that time.

Lastly, in that same vein of reducing stress by streamlining communication methods, you should also consider streamlining your data collection location. Set up a centralized location that folks can access to

actually add in the important reference materials that you're going to use for developing the proposal. This could be a shared drive space in the cloud or even a web-based platform like Grants Office Communities. What is important is that you have that single holding ground for people to dump the data you need to develop the proposal and that everybody has access — whether it's meeting notes, budget calculations, product quotes, your organization's mission and history, recent needs assessment results, whatever it is. You can reduce frustration by having all of these materials in one location rather than having to hunt around for them.

Tip 24: Build a Solid Grant Seeking Team

Elizabeth Evans:
This leads us to our next tip, which is all about having a solid team to support your grant seeking effort. Especially once it's time to put pen to paper, it really does reduce a lot of stress and leads to quality. Now, not every team member is going to be involved in every conversation. You should be prepared to have a rotating cast of supporters. There are lots of details that go into grant proposals, so you're really only going to need certain individuals at key points in time based on that expertise. But it does take several individuals with their expertise and input to really build out that project. As I like to say, it takes a village to prepare a quality grant proposal. And yes, that's true even if you have a grant writer, because they probably don't innately have all of the knowledge needed to answer every grant application question on their own. Again, that's where the team comes in.

There was an example about this earlier, but I'm going to double-click on it. IT team members are often left out of planning conversations, only finding out about projects after money has been awarded. Unfortunately, this does mean instances where the project success relies on expanded IT capabilities or requires IT-related purchases — something that's not always planned because the IT team was left out. Like purchasing an iPad when you're exclusively set up to be a Windows-based organization, or not having adequate bandwidth or cybersecurity measures in place to handle Wi-Fi traffic and protect personal data that might be being transmitted. So taking a critical look at your goal and thinking really hard about who you're missing in support of this goal, whose input you should get — even if for only one quick meeting or one little gut check to make sure everything is going to work — is really important.

This does include your project partners, too. As Ashley noted in tip 20, the earlier you involve your partners, the better the outcome. They might have those valuable insights that can enhance the quality of your project, and it's far easier to get that information down earlier so you can plan around it rather than having to adjust and change course later on once you're in the throes of grant writing and having to toss out paragraphs of content that had been agonized over previously. Which takes me back to why it's so important to have one person who is acting as that project manager. They get to be the director of the show. They're keeping track of who needs to be meeting and delivering what bit of info in that shared location for the proposal development resources.

Tip 25: Give Yourself Plenty of Time

Elizabeth Evans:
Which takes us ultimately to tip 25. I lampshaded this at the beginning, but make sure that this point hits home — I wanted to give it its own tip. It takes time to prepare a quality application. So make sure you give yourself plenty of that time. In fact, the more time you have to prepare, the better. It is never too early to start, even if the grant application window just closed for this year and you're thinking of applying next year, because no one does their best work when feeling stressed or short on time. We're human. Not to mention, sometimes we are operating in systems that set timelines for key proposal elements completely out of our hands. For example, it might take your organization one or two weeks to have an expired SAM or UEI number renewed with the federal government before you can apply to a grant.

So the best thing you can do is try to be intentional about the proposal development process as possible by taking that plan and developing a proposal development calendar, which we have an example of here on the slide. This one is set up over one month, or four weeks, before the grant deadline, which is a little stark, but just know that your calendar might look a little bit different depending on the size and complexity of the application you're preparing. I've personally worked on large federal grant proposals that have taken three or four months to get pulled together, a state grant that took the span of three weeks. I even once wrote a foundation grant — just a little thing — but in just a weekend. The trick is to look at what is required for the grant application like Shannon mentioned in tip number seven, and figure out how you can get all of that done in the time that you have available to you.

To start, you want to work backward from that due date to establish key proposal development milestones. When are we going to have an outline ready? When are we going to have all of our data collected by? Feedback on drafts, getting executive approval like Ashley mentioned, when are we going to start uploading this? Things like that. You're also going to want to know when people are out of office and if you have to plan around vacations or holidays, because that can impact your time — that's taking away valuable work time that the group has. And of course, leaving time for that submission process. Not only are you avoiding technical issues that might prevent submission if you're not submitting day-of, it also sends a very subtle, good-look message to the funder if you're able to submit early, because it says, “hey, we're on top of things. We don't have to do it down to the wire.”

Read, Read, Read the Guidance

Elizabeth Evans:
This all builds to saying our 24th tip — you need to read, read, read the guidance to ensure you're always following directions. One of the most common reasons proposals are rejected is for not following directions. You don't want all of that hard work that you and your team have put in to go to waste

because of some really easily avoidable mistake, like not following the directions. This goes beyond considering things like actual appropriateness of your project for the grant question, which was Shannon's tip number ten, but looking at some of those pesky technical aspects too.

In fact, these days, most submitted grant applications actually go through a technical review, sometimes run by an AI bot before even making it to human eyes. They're looking to make sure you're not over page limits or character counts, that all required attachments are present and in the correct file format, that you have the correct margin and font sizes. Now these AI bots are getting sophisticated enough to even see if you're following the requested content outline with headers. So it's only after clearing those technical review requirements that your proposal is going to make it to a human who's going to actually read the content and judge if your proposed effort fits within the grant's objectives and your proposal has sufficient details to inspire confidence.

You don't want all of that hard work, again, to be tossed out because you failed to follow the directions. So reading the guidance is a really important thing. You don't want to read it once and then abandon it and never return. The guidance is your friend. Keep it handy during the proposal development process, especially if they have a section on how proposals are going to be scored and selected. The funder tells you literally everything you need to know in that guidance document, and to ignore it is basically the equivalent of preparing your application on hard mode.

Get Someone to Read Your Proposal

Elizabeth Evans:
Which brings us to my last tip for us today. Get someone to read your proposal, preferably someone who's unfamiliar with the project that's being proposed but you trust to provide critical, unbiased opinions. You're looking for someone who can give you what I like to call the tough love on the front end by pointing out potential pitfalls in your application materials that would give the funder reason to deny your request. This goes beyond simple things like spelling and grammar, but really looking at a deep dive into the content itself.

You're asking them to look for things like word salad — run-on sentences that don't make sense or require a re-read to understand. Any time you're using insider knowledge that isn't adequately explained — so this might be industry acronyms or terms that the layperson may not have knowledge of, and it presents a barrier to understanding. Gaps in logic or understanding, just making claims to things or making certain assertions that are not backed up with data or any clear explanation of why. And of course then the cherry on top is things like spelling and grammar — making sure you don't have the wrong case of “there,” “their,” or “they're.” Things that spell check might miss: missing words, mismatched verb tenses, missing or incorrect punctuation.

As I mentioned with the previous tip on the guidance, funders will usually include some details on how applications are going to be scored and ranked against each other to determine which projects are funded and which are not. You definitely want to be referencing that when writing your application, but it can't hurt to share it with the person you ask to review your grant. Ask them to look critically at your proposal through that lens of the scoring criteria and give you feedback on the areas that they think you could improve upon to maximize your score. So just like in grade school, when your teacher would have you do peer reviews of papers before turning them in for the grade, getting someone you trust — a colleague, a friend, a partner, a parent, a sibling, whoever — to check your work means you have way less risk of losing points for silly reasons when your application is eventually scored by the funder.

So with that, as I wrap up my time today, if I have to leave you with one thing that can help you with preparing a quality proposal, it's that you have to intentionally plan your actions to support that drive for quality — be it through regular team meetings, leaving yourself plenty of time to write and submit, or even getting someone to make sure you haven't lost the forest through the trees with your application's content. Intentionality is what it comes down to.

Really, I think this idea of intentionality is present throughout most of the tips we've shared today. Grant seeking isn't done well as a reactionary action, a whack-a-mole process, if you will. It's something that organizations plan around and fully commit themselves to supporting actions that are going to support those efforts of grant seeking. That intentionality is what builds a culture of grant seeking and your organization's capacity for grant seeking, which then leads to significant and long-term success with submitting quality proposals and getting funded. With that, I'd now like to hand things back to Ashley to talk a little bit about something several of us have mentioned today, Grants Office Communities. Thanks.

Grants Office Communities

Ashley Schultz:
Thanks, Elizabeth. And hi again, everyone. Thank you especially to all of you who are sticking with us here as we click over into the one-hour mark of this webinar. We did practice — we did try to put this into an hour — but we all just love grants a lot. So when you get us talking about something that we love, we tend to talk about it for a little while. Before we hop into our Q&A session that's facilitated by Michael, I just wanted to quickly share, as Elizabeth mentioned, some details on Grants Office Communities that we've all been referring to throughout today's session.

We launched this platform just in September, and to be honest, we've had a really great time watching folks log in, make projects, find grants, and work through the application process together. If this is totally new news to you, Grants Office Communities is, like I said, a grant search and collaboration platform. It's an all-in-one tool where you can come together with ideas, bring in your partners, find grants, and then apply to them together all on the same website.

We have currently built it out for nonprofit organizations and public sector groups. This is schools, libraries, museums, universities, healthcare providers, public safety organizations, local governments — that sort of thing in the United States. We have plans to expand that footprint into Canada and into some other spaces of the grant seeking world, but for right now we're really just focused on providing this space for U.S. public sector and nonprofits to get all their grant seeking efforts into one place.

If you were with us on our launch webinar back in September, you probably heard me gush about my favorite part about Grants Office Communities being that it acknowledges that grant seeking is a journey and tries to be there for you at every mile. I think Elizabeth kind of said the exact same thing a few moments ago. Every tip we shared here today — building comprehensive projects, finding the right grants, creating shared digital workspaces — all of that is realized inside the site.

You have project pages where you can start jotting down your vision. These can be places where you just collect some ideas on something that would be cool to do someday, or it can be a place where you very meticulously detail out your work plan, invite your accounting team, invite your boss, and actively assign folks inside the platform tasks to keep your initiative moving. Then you have your grants. As of this morning when I checked, we have more than 25,000 funding opportunities from federal, state, and foundation funders inside the United States available for you to search through. That number grows every day. The humans here at Grants Office, we are constantly looking for more grants to add to the database, and we're keeping watch on existing grant programs to make sure that we get updates into our system as soon as we can.

As a user, you can then manually link those grants to your projects. Say you're browsing the database and you see five funding opportunities that would be perfect for your sustainability initiative — you can link all five of those grants to your project page so that all of your collaborators can see them, and then you can decide as a group which one you want to pursue together.

Last but certainly not least, there's just a ton of grants intelligence inside the platform — things on what it takes to submit a successful proposal, the articles that Chris was alluding to earlier about the priorities of federal government agencies under the current administration. There are hours upon hours of recorded webinars just like this one that you can rewatch on your own time. We just added a feature to give you downloadable PDFs of application guides and other step-by-step resources that you can print or drag in from the browser to keep working. So we've had some folks ask questions about Gantt charts and project timelines and things like that in the thread today — there's a lot of how-to plug-and-play resources already available for you there.

I will call back to that tagline I had on my first slide. For grant seekers, by grant seekers — Michael, Chris, Shannon, Liz, Elizabeth, myself, and the rest of the really amazing staff at Grants Office, we're all inside the platform ourselves. We are researching grants for you. We are uploading content on what we are

learning as we work in the grants space. We're helping people build projects, we're helping them find grants, we're giving them an extra set of eyes on their proposals. So the people that you heard today and the people who you've already worked with from Grants Office previously are all there. We're building this platform for you and making sure that it works for you.

So I encourage you to go check out Grants Office Communities. Hop in, try a two-week trial. If you go to communities.grantsoffice.com, you'll see a very quick process to get signed up and just give it a try. I will also note that that website has an option for you to — it has a calendar link so that you can schedule a little live demo of the site. It's directly linked to my calendar. So if you want to sit down, chat with me about Grants Office Communities, potentially how it could sync with your grant seeking motions in the new year, go to the website, find that link, drop the time on my calendar, and we'll sit down and have a chat. With that, I'll give things back to Michael.

Bonus Tip: Measure Your KPIs

Michael Paddock:
Thanks very much, Ashley, and to all of our presenters — great information. I told you we had a lot to cover today. Thanks to all of you who are sticking with us past the top of the hour here. For those of you who have, we have a bonus tip for you.

We talk a lot about making grant seeking part of your agency's overall strategy and not just trying to hit grants on a one-off basis at various times, but making it part of a consistent organizational strategy. Part of that is measuring your KPIs, your key performance indicators. They say what gets measured gets managed, and so it can be a bit of a challenge when you're looking at grants — whether you're a full-time grants professional or you have another job (deputy mayor, assistant superintendent, hospital administrator, whatever it is) and grants are part of your job — thinking about how you measure the impact of what you're doing.

Some of the key performance indicators that are fairly common in the grants world are the number of proposals you submitted, the percent of proposals that you had win from those that you submitted. Cost per dollar raised is a big one, not just in grants but in the whole fundraising world. It's an obvious one — maybe it's an ROI kind of calculation — but cost per grant dollar raised, and your funder retention rate and upgrade. You can put that into a so-called snowball chart to see how you're retaining federal funding or funder funding, wherever it may come from, and what's new, what's expanded, what's decreased from year to year.

The big tip here, though, is to take all these key performance indicators and segment them out into federal, state, and foundation funder types, because they're going to have different meanings across these different funders. For example, you may have a higher success rate with foundation proposals

because foundations tend to be more locally oriented. You may have existing relationships with those foundations. Their applications may be simpler and easier to produce, than a federal grant which tends to be big, more complex, less personal. So you may have a higher success rate with foundations, but because the award amounts tend to be lower with foundations, your cost per dollar raised may actually be lower for foundations than for federal and state grants because the awards are larger. These are all reasons to consider each funder type as a sort of separate category in your analysis.

So if you're looking to improve your hit percentage, your win percentage, lower your cost per dollar raised by being more targeted in the grants you're applying for, and maybe doing some of the work in-house — that makes perfect sense and can be a great way to shape next year's grant seeking activities. But the tip there is: look at federal grants differently than state grants, different from foundations, because they really are different animals in a lot of ways. That can be very helpful in terms of being more realistic and better capturing and directing your efforts. Okay, that's the last tip — a bonus tip for you.

Q&A Session

Michael Paddock:
All right, so I want to thank everyone for participating in today's session. We do have a couple of questions that have come in. If you have additional questions, feel free to send them in the Q&A interface. Some of them have already been answered in the Q&A interface, so feel free to check that as we're going through these.

Q1: What are your thoughts about using AI to write grant applications?

Michael Paddock:
This is a question that comes up fairly frequently nowadays, and we see a lot of startup companies talking about making it easy to write a hundred grant applications using AI. AI is pretty good. It's getting better every day. It's amazing what it can do. But I think there are a couple of things that make AI problematic when it comes to writing grant proposals. The first part is, it tends to be very generic and broad in terms of its language. And while you may be able to get your point across with respect to AI in your proposal, it may not have the adherence to what the funders are trying to fund. It may not truly express the real intent of your project. And because AI can draft 50 pages of narrative in about 30 seconds, you may actually end up spending more time editing an AI-written grant proposal than just writing it from scratch. So that's my thoughts on using AI to write grant applications.

Q2: How can we get around an AI bot initial review that may have incorrectly flagged our proposal as ineligible?

Michael Paddock:
Shannon, we had a question about how to get around an AI bot initial review. We think a project we submitted got determined to be ineligible because of an inaccurate AI review, the kind of first round of reviews. Any thoughts on that?

Shannon Day:
Yes, it's tough because at the federal agency level specifically, with staff cuts, agencies are relying more on that initial round of review. They are apparently relying on AI reviews. One way that we recommend — and we say it so often, follow the guidance — but also pay attention to the language within the guidance. You may have heard earlier this year — I think it was — the New York Times wrote an article about so-called "flagged words." Take a look at those flagged words, but also pay attention to the language in the NOFO or in the application guidance, and tailor your project with those words in mind. The source is your friend nowadays. I don't know if there's a way you can get around the AI initial review because that's just how it's being done, but you can definitely tailor your application with that language in mind, if that makes sense.

Michael Paddock:
That's a great point. And you know, you may agree or disagree, especially in the federal funding landscape — you may agree with the flagged words, you may disagree with flagged words, you may disagree with the whole concept of flagging specific words in grant proposals as a way of weeding out proposals. But that's the reality of grant funding at the federal level today. And I think flexible thinking, being willing to shift your approach to accommodate what the funder is looking to fund and how they're looking for you to articulate your projects — that's all part of making grant seeking an ongoing part of your agency strategy. Not being too rigid in your thinking, because ultimately it can be self-defeating.

Q3: Any suggestions on managing proposal timelines with abbreviated deadlines, e.g., three weeks from NOFO to deadline?

Michael Paddock:
Another question that came in was, this one's for Elizabeth, because you put together that great chart on time frames for preparing a grant proposal. Any suggestions on how to manage these timelines with the abbreviated deadlines that have become common, e.g., three weeks from the Notice of Funding Opportunity to the deadline?

Elizabeth Evans:
Yes, that's a wonderful question, and it is not a unique situation. We're working with a lot of folks who are in that same boat. So first things first, looking back at previous years' application guidance and expectations for submission — they are wonderful guideposts and can get you usually about 75% of the

way there on what you're going to need to do to prepare, because a lot of these programs don't change too much substantially from year to year. Or if they are changing, it's things like competitive priorities. But when we look at the funding landscape year over year, things do tend to be rather stable by and large in terms of funding themes, despite what we read in the news. So one, looking at the previous year's guidance in terms of expectations.

But then two, looking internally and asking for exemptions on internal review requirements to be made given the shortened scenarios that we're dealing with. At the end of the day, we're all people working with other people. Having that human conversation and asking for a little give and take as we navigate this new space is really, really important. Don't just give up because it says we need a month and a half to really be put on the agenda twice with our board. See if you can only be in there once, or if they can add you for the meeting coming up tomorrow. Because that's our new reality, unfortunately.

And then the last thing I would say is really commit yourself as a team to making that grant a priority. And that goes back to what I was saying as I was wrapping up my section about a culture of grant seeking. If you really want to be successful, organizations are going to support grant seeking wholly. And if it means all hands on deck for a really important application, that's what it means. You put some other lower-leverage activities off to the side for a few days so you can put that effort and thought into this application that you guys want to submit. So those would be the three biggest things I would recommend for a shorter turnaround timeline.

Closing

Michael Paddock:
Fantastic. Okay, thank you. Once again, thanks to all of our presenters. We had Chris LaPage, Ashley Schultz, Elizabeth Evans, Liz Shay, and Shannon Day. Thanks to our producer, Kate Ashley, also, for making it all happen. And thanks to all of you, as always — we appreciate your time. We hope you found this a valuable use of your time, and we look forward to seeing you again on a future webcast. Have a great day, everybody.

— End of Transcript —

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