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Beyond the Basics: Advanced Grants Strategy and Competitive Positioning

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Presented by Michael Paddock and Amber Walker • Grants Office, LLC

Welcome and Introductions

Michael Paddock:
Hello, everyone, and thanks for joining us for Beyond the Basics: Advanced Grants Strategy and Competitive Positioning, our special first of four expert webcasts. I am Michael Paddock, CEO of Grants Office, and I want to welcome everyone to today's session. We have got a really good one for you.

Housekeeping

Michael Paddock:
Before we get started, a couple of housekeeping items. As many of you know, you can listen hands-free over your computer's speakers or headphones; there is no need to dial in. In fact, I am starting to wonder if dialing in might be a thing of the past. The session is also being recorded, of course, and the replay will be available along with other resource materials at the page that you used to register for today's session. We will also send out a link to that page, so the replay will be available, as well as the slides.

Today's Speaker and Agenda

Michael Paddock:
So let's go ahead and jump in. I am joined today by Amber Walker, Grants Development Consultant here at Grants Office. We are very happy to take you through the next 30 or 40 minutes and talk about some more high-level tips than you might see in some of our more general webcasts. This is something we have been wanting to do to elevate the conversation — talk about some things that maybe are a little bit more sophisticated, a little more in depth.

We are going to talk about the increasingly competitive landscape. People are familiar with that already, but we are going to set the table with that. Then we will talk about projects and finding and evaluating funders, fine-tuning your proposal alignment with each funder's priorities, and then some thoughts on collaborations and your long-term commitment to grant-seeking — some of the basics, just to revisit.

And then we will be talking to you about some of the things Grants Office offers that are available for you if you should need them.

I should mention that we do offer comprehensive grant support services, but we also often are called in when there is a short timeframe and the organization does not have sufficient resources to really move forward with a robust proposal or to do extensive federal, state, and foundation funding research. So think of us if you are running into a bit of a jam, you are short-staffed, and you need some additional help as well. We are happy to do that. Okay, so let's turn it over to Amber to take us through, just to kind of set the table, an increasingly competitive landscape.

The Increasingly Competitive Landscape

Amber Walker:
Thank you, Michael. Everyone, thank you so much for joining us today. As Michael said, my name is Amber, and I am representing Grants Office as a consultant for our advanced grants strategy webinar today. I am really excited to jump in.

A Cautionary Tale

Amber Walker:
Before we get going too far, I do want to share a little bit about the grants landscape as we are seeing it through the lens of a personal story about a direct client. This particular direct client submitted a HRSA grant application in the middle of last year. If you are unfamiliar, HRSA is the Health Resources and Services Administration, and it is known for extensive, specific, and very detail-oriented grant applications. This client did end up receiving a rejection letter a couple of months after submission, and we never like to see that, of course. But upon further review, they received a 98 out of 100 for their merit review with no weaknesses noted. Essentially, we were told it was an almost near-perfect grant proposal with no notes, and we were still rejected.

That means, when we were looking into it a little bit further, there were at least 19 other grant proposals that received a 99 or higher, and probably a hundred more that received 97s, 96s, 95s, and all the way down. So I am sharing this with you because this is a well-established grant program with a strong track record of securing grants. They are well-established and well-connected in their region, so they have all the tools and tricks — and rejection happens to the best of them. I do not mean to be discouraging with this story, but I just want you to know that we are kind of setting the stage for the type of landscape we are looking at. Hopefully through this webinar, we are going to show you some practical ways that you can stand out among a sea of well-developed proposals from well-connected and established organizations.

Federal Acceptance Rates

Amber Walker:
We are going to dive deeper into what that landscape looks like now and how to put your best foot forward and develop proposals that will stand out to reviewers. On the screen, you will see a representation in numbers of how competitive the grants landscape is. These numbers represent federal grant opportunities as well as opportunities throughout Canada. When we are looking at the numbers all across the board, we are seeing 30% or less acceptance rates, all the way down to the near 7%. This shows you that the need is there and the funding amounts are not able to fill the gaps for various reasons.

It has been well known for a while now that the federal space is more competitive — you have really got to bring your A-game. But we have been experiencing a shift in other grant sectors as well.

The Foundation Space Is Shifting Too

Amber Walker:
On the next slide, we are going to look at how things are shifting at the private foundation space, and some examples we will go over will really drill that down. As you can see on the screen, I have pulled three examples of private foundations, and these excerpts are pulled directly from funder websites. I want to bring your attention to some of the numbers we are looking at here.

Foundation A receives 1,000 grant applications annually and is funding about 300 of those. Foundation B is opening up an application window, but they are capping once they receive 500 applications, so they may be closing early. Now, this foundation is actually the first time I have seen that — and just because it is the first time does not mean it is going to be the last. I would not be surprised if more foundations start to implement this method to kind of stem the number of applicants that they need to review. And Foundation C is stating that they have had to decline increasing numbers of well-aligned organizations, including some of their longtime partners.

All of this is going to show you that there are real examples of how competitive this landscape is becoming — and yes, not even certain for existing partners of foundations. So this is just going to be one of many examples why good writing alone is not going to be enough to secure funding moving forward. As we go throughout this webinar, we are really going to drive home how you can stand out when this is what the competition looks like.

Creating a Fundable Project

Amber Walker:
You would think that the first step might be to make sure you are going after the right grant and the right funder, and I am going to pass it over to Michael to explain what evaluating a grant fit can mean in this context.

Michael Paddock:
Great, thanks very much, Amber. So right — how do you stand out when everyone else has a quality proposal too? The answer is to create a fundable project first and foremost. People with maybe less experience than those on the call today might have the impression that you can just wordsmith your way to overcoming weaknesses in your projects. To a certain extent that is true — you can be aspirational in some cases, you can be forward-looking in others. So you can sort of tweak the project. But at the end of the day, most reviewers are going to see through a project that has gaps, that needs more development, or that may not be exactly in line with what the funder is looking to do.

I want to just take a little detour from aligning your developed project with the funder's goals and initiatives — and Amber will be talking a little bit more about that in a second — but I want to focus in on making sure that the project that you are proposing is fundable. Here is the tip: it might not actually be the most important project in your organization. Sometimes the most important thing that you have a need for in your organization might not actually be all that fundable from grants. So it is a matter of looking at: okay, what else can we fund to free up money for that other important area, that administrative area or that personnel area that is not directly fundable? In any case, you want to make sure that you are creating a fundable project first to present to the funders. It will make the whole rest of the process go all that much easier.

Where Project Ideas Come From

Michael Paddock:
Let's start out. This is going to be fairly brief, so I am not going to be talking your ear off on this one. Where do project ideas come from? We know that project ideas come from a variety of places. Here are four examples.

The oversight board typically is maybe the most common, where the board says we have a need for this. They have perspective on the finances of the organization in particular, and they may say, okay, we need to do X, Y, and Z. The problem with most of the project ideas coming from the oversight board is that information in an organization tends to flow downward and not upward necessarily. If your organization is not like that, that is great — congratulations. In most organizations, it is just the structural nature of organizations that information tends to flow down from the oversight board, down through management, down to the staff. In a lot of cases, the board members may not be aware of the kinds of

projects, concepts, and ideas that may actually be fundable. So thinking about decentralizing the project development piece of an organization first, and then evaluating all those project ideas to determine which are the most fundable, can be a great way to significantly ramp up your grant-seeking and take your grant-seeking to the next level. Nevertheless, oversight boards are quite often the source of project ideas.

Vendors, too, have great ideas. They are exposed to a whole range of different organizations — a lot of them like yours — and so they see what everybody else is doing and what is working, and they may have good suggestions.

Staff have the greatest amount of exposure to direct day-to-day information. They know what is working and what is not working probably much better than the oversight board, and they certainly have opinions about it, but they may also be a good source of project ideas.

And of course — whether you are a municipality and you are talking about citizens, whether you are a hospital or a nonprofit and you are talking about clients, whether you are an educational institution and you are talking about students — those end users can also be a good source of ideas as well, as long as they are filtered pretty extensively. This is where project ideas can come from.

So my first piece of advice is: do not be afraid of too many project ideas. I think there is a general human resistance to encouraging too many projects because it makes a big workload for the people who have to screen them, and there is a possibility that people will be disappointed if their projects are not selected. Nevertheless, having more projects to choose from is the best way to make sure that you have the most promising projects being put forward to the funders.

Evaluating Whether a Project Is Fundable

Michael Paddock:
Once you have a project or group of projects, this is just one example of a rubric that you can use to determine how fundable a project is. It is one that we have been using a long time — looking back, I think 2010 is when we first started using this — and it is a very easy way to quickly go through and determine if a project could potentially be fundable. It does not align necessarily — one of the line items sort of alludes to alignment with the funder's priorities, but it does not align with a particular funder's priorities. It really just gives you an idea: is this something that is ready to fully develop into a grant proposal?

We have an Excel spreadsheet of this, so you can just add your score. It is just a one or a two — very straightforward. You have 10 different items, and you basically assign either a one if the project is not really at that point, or a two if it is. You will have a score of somewhere between 10 and 20 that you can

use to decide whether the project needs further development or whether it is ready to start looking for funders and start doing your proposal development.

Finding and Evaluating Funders

Michael Paddock:
The next step, of course, once you have a group of projects identified that you want to seek funding for — and maybe the reason you are here is to look at where the funders are — how do you identify grant funders and how do you evaluate their fitness to support a particular project? It takes resources, as you know, to apply for a grant. Whether you are applying internally using internal staff and other resources, whether you are outsourcing it to a company like Grants Office or another grant writer, it is going to take some amount of resources to apply for that grant and really do a good job. And everyone has limited resources, so you want to make sure that you are allocating those resources to the most promising grant programs.

Sourcing a Funder List

Michael Paddock:
There are a number of different ways to source a big list of grant funders. Some of them use AI to match you up with a big list. Taking a look at that, the list of grant funders — anytime you get a big list of grant funders, it is really not quite as valuable as a more focused list, to be honest. Which is why we developed Grants Office Communities the way we did.

So if you will forgive a 30-second commercial — it is a great way to search for grants. You would just put your type of organization, your location into the filters, and the nature of the project you are looking for, and it will identify the grants that are going to be the best fit for your project. So searching for grants is easy. Creating that initial list of funders can be done through Grants Office Communities. If you have other resources that you are using — if you are only looking for foundation grants, for example, or if you are only looking for federal government grants — you can use different resources.

The nice thing about Communities is that it does combine federal, state, and foundation grants. If you look at most other tools that are out there, the state grants are the hardest to get, but sometimes they are the best prospects because they are less competitive than federal grants. They are more responsive to local needs than federal grants, but they can be bigger than foundation grants. So state grants can be important, and we have included all those in there as well. Okay, enough of a commercial.

What to Look at When Evaluating a Funder

Michael Paddock:
When you are looking at the funders that you are considering, there are a few different things that you want to take a look at. One is, make sure that you are eligible to apply. And if you are not eligible, a collaborator may be eligible as well. So if you are a child services organization but you work with local law enforcement in some of your victim services activities, the local law enforcement agency may be able to apply for grants that you as a nonprofit might not be able to apply for, and vice versa. Consider what collaborators can apply for too. As long as the funding goes for the purposes for which the grant was intended, funders do not normally care how the funding gets distributed out among the community who is actually executing the project. In fact, they often encourage collaboration.

Look at the total amount of funding available. Is the grant too small to allow you to do what you need to do? Are you going to have to cobble together a hundred $5,000 grants to get your $500,000 project funded? Or are you looking for $500,000 for a project, but the grant is, like, $10 million? We have seen some transportation grants that are like $10 million — way too big — and it would be difficult to scale your organization, and potentially very disruptive, to scale your organization to the point where you could actually even execute a $10 million project. So think about the amount that is available on both sides. Is it about the right amount of funding?

The matching requirements: are you able to meet those matching requirements, either with your own budgeted funds or with foundation funds and other local funds that might actually work as a match, so you do not have to use your own organizational budget?

And then, of course, the application burden. I mentioned that there is always a cost associated with applying for grants. That cost tends to be lower for foundation grants, for reasons we will talk about in just a second, than for federal grants and certainly, to a certain extent, state grants as well. But think about this: if you are asking for $10,000 and you are going to put together a 20-page proposal, that can be a lot for a $10,000 grant, unless you are 100% sure you are going to get it. So think about what the application burden is.

Look at the scale — I mentioned the amount of funding that was available; sorry, I misspoke when I talked about the amount of funding that was available, so we will talk about it here — how competitive the grant actually is. Scale goes to what I was talking about earlier; the amount of funding that is available is really about how competitive the grant is. Grants that are giving away awards to 1% of the applicants are very competitive — kind of a shot in the dark. Grants that are awarding two out of five applications — that is a pretty good place to start.

Think about the collaboration requirements that are made. Some grants have very stringent collaboration requirements; you have to have those organizations in place. Your lead time: do you have

enough time to develop a strong application? Usually we require at least three weeks before the application deadline. Of course, we have done grants in 48 hours like everybody else, but generally to make sure you have a strong application, you want to have at least three weeks of lead time. If you have extra processes and approvals in your institution — higher education, large municipalities where it has to be submitted a whole week before the deadline so that other people can review it — you will want to back that off even further.

And then the track record with the funder has more of an impact, unless you have major issues, with foundations, which are more relationship-driven than with federal and state. But nevertheless, it is worth considering.

Some Thoughts on Foundation Grants

Michael Paddock:
Some things to think about regarding foundation grants — why you might want to consider a different strategy with foundation grants: there are more foundations to apply to. A lot of times you can reuse the content that you have developed for one foundation grant for another one. That is less true with state and federal grants because of how prescriptive they are; they tend to tell you exactly what that federal program or state program is trying to fund, and usually you customize the proposal to exactly their application requirements and scoring criteria, so it will not be as reusable. But with foundation grants, because they are more locally responsive and a lot of times have less structured proposal requirements, you can reuse some of that content.

I mentioned they are more responsive to local needs. They tend to be based in the community, and their giving is in the community, and they can also provide matching funds — where federal and state grants require matching funds, a lot of times those matching funds can be provided by foundations. Because foundations like to have their money leveraged, they are usually more inclined to give as a match to a larger project.

Evaluate Foundations and Government Funders Separately

Michael Paddock:
A couple of things. It is a good idea to separate out foundation and government funders when you are evaluating these funders. You can usually apply to a lot more foundations than state and federal funders. The cost in terms of resources is going to be a lot less, even if you are using internal staff or externally contracting it out — the cost is going to be a lot less, and you can apply to a lot more foundations, if you are eligible to apply to foundations. So it is a good idea to separate out foundation and government funders.

On the other side, when you are evaluating those success rates — thinking about your cost per dollar raised and other KPIs that you may have associated with your grant-seeking activities, depending on how robust your grant-seeking operation is — it is also a good idea to separate the foundation and government funders and consider them each in complete isolation from each other.

Success rates are going to be different. The amount of the awards — you know, you might get two out of the five proposals that you submitted to the state, but they may each be for, like, $200,000. So the amount of effort that it took to get that $400,000 in awards is significantly lower than what it would take to get $400,000 of foundation funds in most cases. So even though your success rate might be higher with foundations from a proposal-to-proposal basis, the award amounts are going to be different.

Anyway, the bottom line is, it is best to think of those two in isolation, both in terms of going in and considering which funders you are going to submit proposals to, as well as on the other side, when you are evaluating your effectiveness. Okay, now I am going to turn it back over to Amber for a little discussion of fine-tuning your proposal alignment with funders' priorities. Amber?

Fine-Tuning Your Proposal Alignment with Funder Priorities

Amber Walker:
Thank you, Michael, for giving us some really great background on identifying a funder. Now we are going to move forward with the assumption that we have identified a funder. What is next? We are going to have to fine-tune our proposals. It is going to be really tempting to jump to a grant opportunity page and never leave — you want to jump right into your proposal and start developing that out.

But by exploring a funder's website outside of that open grants opportunity page, you can gain really valuable insight into what is truly important to the organization. By reviewing this funder's mission statement, we will have an advantage going into drafting our proposal. Just by looking around the website, we know that they want well-established nonprofits that are serving large demographics with broad impact. They want results that are unique — so what is going to set your project, your proposal, above the rest? And they want organizations that are sustainable, so they are going to be able to assume the costs of the project or the program after the grant award dries up. Bottom line is: it is important to get off of that grants opportunity page and into the rest of the website.

Where to Look for Clues Beyond the Website

Amber Walker:
Next, we are going to review where you can look to find some of these clues outside of the website. When you are researching funders, there is a wealth of information at your fingertips at all times. Of course, we all know the website is a great place to start, but there are annual reports and 990s. There are previous webinars and conferences and their social media accounts. Just by spending that extra time

exploring a funder's online footprint will help you identify a lot of things. It can help you identify institutional norms. It can help you set your expectations for acceptance rates — what are your chances — and a whole lot more.

In my time deep-diving a funder for a client, I was reading a blog post that was somewhat buried within their website, and I found the following statement: “After receiving and reviewing more than 1,200 grant applications, the foundation's board of trustees narrowed the pool of applicants down to 137 finalists. Lively discussion ensued, with the upshot being 86 nonprofit organizations have been awarded grants.”

Just by doing a little extra deep-diving, looking at some blog posts, kind of poking around, I was able to come back to my client and help set expectations. They gave us the numbers; this is what we are looking at in terms of ratio. It tells us who is reviewing — that information is not always available, so it was really nice to have that there because it tells you a little bit more about their institutional norms. It was not directly linked in that blog entry, but what was found on the page was a list of the board of directors and board of trustees. So it gave you, in plain language, the names and the titles of the people who are reviewing these applications. Then we can go back and say: are there any threads that we can tie to any of these board of directors? Do we have any connections? And really kind of set in motion the next steps in developing the proposal, if those connections were available. And it was only found by doing that little bit of extra evaluating of what the funder is putting out there.

Turning Clues into Actionable Proposal Language

Amber Walker:
Once you start to pull out these important clues and finding important information, then it is like: what is next? What are you going to do with that information? We are going to explore how to put this deep-dive into actionable steps into actually developing your proposal.

We are going to build on the mission statement example from earlier by identifying vocabulary. You are going to clue in on what the funder is actually trying to say. Funder websites can look like fluff at the surface sometimes, but you need to be thinking: what can I infer from this? What can I pull out from this? They are being intentional about what they are saying to their audience — I can assure you of that. So it is up to you to speak their language back to them through your proposal.

In this example, Foundation A is looking to “support and grow demonstratively impactful programs to create long-term benefits to their society.” This is according to them on their website. Within that statement, I would pull out demonstratively, long-term benefits, and society. Then we are going to synthesize what that means — what are those values?

By demonstratively, we can pretty easily come to the conclusion: they want something quantifiable. Long-term means you, the proposal developer, are thinking in terms of multi-year impact, generational impact. And society is indicating that the funder is looking for benefits that extend beyond your project, beyond the program, beyond your beneficiaries — they are really looking at the ripple effect that is going to look like beyond this grant term or beyond this project period.

So I have developed a sample statement of what this can look like in the implementation section. As a reminder, we pulled out demonstrate, long-term, and society and turned it into: "Over a ten-year period, the program is projected to reduce poverty rates by 18%, lifting more than 50,000 families into stable economic conditions, resulting in an overall societal benefit through increased economic productivity, improved health outcomes, and stronger and more resilient communities." You would, of course, want to go on to elaborate more of those benefits and really quantify those benefits, but that statement sets the stage for the reviewer that you are thinking in the same terms as them, and it will guide how they look at the rest of your proposal.

Paying Attention to Federal and State Language Too

Amber Walker:
The examples we have gone over so far have been specific to private foundations, but this also must be said for state and federal grant opportunities as well. Be sure to pay attention to the language that they are using within their guidance and on their websites. There have been a lot of changes at the federal level in recent years about the types of labels and beneficiaries that can be identified in grant proposals, as well as changing societal norms. This is something I see a lot in the healthcare space: a term previously acceptable is no longer commonly used and is no longer empowering to the people that you are intending to serve through these funds. So it is going to be really important to be paying attention to the guidance that is out there and the societal norms that are happening, so that you are current with your language.

Aligning with Funder Size and Scope

Amber Walker:
Before we move on to partnerships, I do want to leave you with one more insight into fine-tuning your proposal with funder priorities, and that is going to have to do with really the size of your organization. When you are evaluating funders, it is super important not only to align with the focus area but be in alignment with the size of the organizations that are being funded.

Organizations that serve women and children are vast and very diverse, for example. So a funder who is interested in supporting women and children may seem like a good fit on the surface, but they might have additional criteria — either unofficial or official — about the size and scope of the organizations they are looking to fund. That may or may not be spelled out for you on the website anywhere, but that

is something that you can infer if you are referencing previous grantees when possible and really sizing yourself up to them. Look at the scope of population served, the number of square-mile regions that they are serving, and really put yourself up against what is already being funded and ask yourself: am I sticking out, or am I kind of blending into this group? Then move forward accordingly.

Collaborations and Partnerships

Amber Walker:
Now, as promised, we will dive a little bit deeper into collaborations and when to consider partnerships, even when they are not a requirement of a grant proposal.

Why Partnerships Matter

Amber Walker:
The benefits to partnerships really can be endless. These are some of the top reasons why a partnership may be an attractive addition to your proposal. They expand your expertise and experience, and I think that can go over very well with reviewers and funders. It can alleviate the financial burden of the cost-share match. We know that nonprofits are often in a position where funds are limited — that is a lot of the reason why they are out looking for grants to begin with — so that cost-share match can be a barrier that can be overcome through a partnership. It also can stretch the funder's investments, so it will show the funder their dollar is going to go farther into the community than if they are investing in one organization alone.

What Makes a Strong Partnership

Amber Walker:
We have covered the benefits of the collaboration, but I want to talk to you about what makes a strong partnership and some of the factors to consider when you are deciding who to co-develop a program or a project with.

I would first look at box one: is there anyone existing today that you could call up and partner with without a whole lift to make that happen? You have that extensive history, you have already coordinated efforts, you have those norms and communication — that would be the inner circle.

Next, I would look at box two and say: is there anyone in the periphery, friend-of-a-friend, people in your region that have overarching goals that are kind of targeting the same populations? Maybe you are serving mothers with young children, and they are serving early literacy, and it can easily be made a case for a complement of service.

When you are looking at one and two — who to partner with — three and four can take that one step further and see if they are a good fit for you right now. Three really goes into their grant experience: do

they have any successful proposals? And if not, are you in a position to help them through that process and kind of take the lead on that grant administration and be the lead applicant?

Additionally, are they credible in their field? Do they have the expertise? Do they have regional support, regional recognition? Are they using evidence-based practices? Those are the types of things that you want to ensure before you decide on a potential partner.

Communicating the Partnership to the Funder

Amber Walker:
We have talked about why you should consider partnerships and who you should consider for them, and now we are going to move forward with the lens that you have committed to a partnership and you are going to put that in a proposal and show a funder what that looks like for you in your program.

You have to communicate to your funder that this partnership is going to improve your credibility — other organizations believe you are capable of this project. It is going to increase your assets, so it is going to show the funder that this project is bigger than you. It is expanding your impact. So you want to relay to your funder or your prospective funder that the impact will be greater than if they fund an application with a single organization alone. And it hopefully will relay that there is shared accountability that will result in long-term sustainability of your efforts.

Now, these points should all come through in the sections that specifically ask for partnership information, of course, but I am going to dive a little bit deeper and talk about how else you should relay this information to your funders.

In my experience as a proposal reviewer, when proposals come across my desk that do involve partnerships, people usually do great with number one — there is a little introduction of their partners in the executive summary; it gives that high level; we get to know who they are. And then almost immediately it starts to fizzle out. In box two, the narrative sections, you start to see less and less of the presence of the partnerships. By the time we get to evaluation practice and budget, it is like almost the partnership has ceased to exist when we get to this point in the proposal development. So I urge you to think about how you can weave your partnership and relay those points from before — credibility, shared assets, greater impact — how you can take every chance to relay that information to a funder.

A Long-Term Commitment to Grant-Seeking

Amber Walker:
We have talked a lot about how your individual proposal can stand out among a sea of other well-written proposals, but the next tips we are going to go over are going to talk about how your organization can stand out as a competitive grant-seeker as a whole, and not just at that proposal level.

When we are thinking about long-term, we need to ask ourselves: how are we going to sustain momentum? That is really what it comes down to. How are we going to sustain momentum and build a sustainable grants pipeline?

Traits of Grants-Forward Organizations

Amber Walker:
Grants-forward organizations will have a few things in common, and I am going to cover eight traits and a couple of strategies that these will have in common.

The first four: they understand winning comes down to more than good writing. That well-written proposal is a great base, but as we have covered today, there is a whole lot more that goes into it than just good writing at this point. They know what opportunities to pursue and when. Michael explained earlier a great way to go about putting applications and opportunities into buckets — when and why to pursue them.

These organizations are intentional — I use that word very strongly: intentional — about their use of advanced technologies. ChatGPT could write a grant proposal for you, but it is not going to be a good one. But there are lots of advances in data and data visualization. AI and ChatGPT can be integrated into grant-seeking platforms, and there is a whole host of technology that can be used. But being intentional about that strategy is key.

And these organizations are adapting to the changing landscapes. If you are on this webinar, you have probably been in the game for a little bit now. Over the last couple of years, you have seen a big, almost tidal-wave of changes and shifts in the landscape, and I expect it to continue to evolve and change. So organizations that are forward-thinking are reading newsletters, they are on LinkedIn and watching program officers and what they are talking about, they are reading federal guidances, they are staying up to date, and they are sharing that information internally.

They are also going to have team members who do not work in silos, and this goes directly with the point below: they are creating a culture of support through all departments. Actual grant writing — writing of the proposal — can be done with one or two people, but developing the projects, developing the budgets, getting information from stakeholders — all of that is a team effort and really should not be left up to one person.

Recognizing rejection is an opportunity to learn. Everyone is going to get rejected. Nobody is batting a thousand out there. It is really what you can take from that and move on with.

And integrating their grant-seeking into long-term planning and strategy. If you are in it to win it, grant-seeking is not a one-and-done — it is a marathon. It is an annual cadence. It is a workflow that you build into your whole year. Implementing strategy for your next calendar and beyond is going to be important

to be able to sustain your momentum and get back up on the horse after you submit an application and you get a sigh of relief, or you get a rejection. Either way, how are you keeping the momentum going for the long-term?

Strategies Grants-Forward Organizations Use

Amber Walker:
In addition to these traits, I also want to just talk about a couple of strategies that these organizations are going to employ.

Tracking success is a strategy all in its own. It not only is going to build credibility, but it is going to provide that persuasive and compelling content for your proposals. And it will save you time when it comes to project evaluation and reporting. So just make sure that that is built into your cadence. It should be part of your whole grants lifecycle.

And finally, grants-forward organizations will reflect on their capacity, and I am going to hand that off to Michael to expand a little bit more on that.

Capacity to Develop Competitive Proposals

Michael Paddock:
Great, thanks very much, Amber. Great information — a lot of information. Hopefully everyone is still with us. We have been talking a lot about the process, so let's move forward in terms of capacity.

I mentioned the resources that grant development takes in order to get a really high-quality proposal across the finish line. This is just a conceptual chart. It does not represent any one particular organization — your mileage may vary. But the idea here, just from a lot of years of seeing this and doing this, is that generally there is an optimal point at which you want to be submitting proposals. The optimal investment is going to be determined partly by the number of really good funding prospects you have, how much you need to raise, how broad the project is, et cetera. But in general, it may help to keep this general concept in mind.

There is a point where you have really good — as Amber has been talking about — a really good connection between your project concept and the details associated with what you are trying to do with your project and who you are trying to impact and the outcomes you are trying to achieve, and the funder's interests themselves. And there is only going to be a limited number of funders that will directly support that for which it is really a perfect fit. When you start to get beyond where it is a perfect fit, you start to see a lower success rate of your proposals.

Generally we see a little bit past where the funders match up and align perfectly with exactly what you are trying to achieve — just a little bit past that, with some funders that might be good prospects for 80% of reasons, but there might be 20% that is not quite exactly in line — that is the best place to invest.

Just wanted to give a thought to your capacity to actually develop competitive proposals. Again, everyone's capacity is going to be a little bit different. But if you are looking for a sense of, okay, we are going to have to make an investment — it could be internal staff time, it could be external, or a combination of the two — but we are going to have to make an investment here. How much of an investment is it really worth making? That line is going to be determined by a combination of the funders that you have selected, how closely they associate with your projects, and then ultimately how much you need. So just a thought there on capacity. Okay, Amber, you want to take us through 'Don't Forget the Basics'? Sometimes the basics are the most important thing.

Don't Forget the Basics

Amber Walker:
Absolutely, and very easy to trip up on sometimes. So we have talked at great length about the competitive landscape, so these points are really meant to drive home the fact that you do not want to be one of the proposals that is easy to eliminate. You want to at least be in those top 'hard-to-narrow-down' groups.

When I am thinking about the top mistakes I see: the right population and the wrong project. We have talked a little bit about this today, but really meaning you have a beautiful proposal, an outstanding project with the right population — the beneficiaries — but your project's scope and size is just out of alignment. It is not going to fit in with what the funder is interested in. So at that point, you take your project and you take your proposal and you pick it up and find somewhere else to go with it.

You have a compelling proposal, but you have ignored some guidelines. I know it is really tempting for grants people to attempt to split hairs on wording of NOFOs and try and read between the lines. But I find it is far more beneficial to take it at face value and to conform and abide by the guidance.

And having a great project with no proof: funders want to award projects that are committing to providing them with success metrics that they can show for their investment, and they really want bragging rights at the end of the day. They want to be able to go back to their website and post all of the great things their grantees are doing. So if you have a great project but you are not committing to show them that through your evaluation or your long-term impacts, the way you are thinking about long-term program goals — it is a big mistake that could cost you and could make you one of those easy-to-eliminate grant proposals.

Wrap-Up

Amber Walker:
I know we have covered a lot in a short amount of time. To set yourself above the rest, you really want to be creating fundable projects. You want to find and evaluate — I say that with a lot of meaning, you want to evaluate the funders. You want to fine-tune your proposal. If you are going to go for a partnership, you want to make sure it is a really strong one. And you want to show that your organization is in it for the long haul and set yourself up — and your organization up — for that sustained commitment to grant-seeking. With that, I am going to turn it back over to Michael, and he is going to tell us a little bit about how Grants Office is here to help. Thank you.

Grants Office Services

Michael Paddock:
Thank you, Amber. Just really quick, I want to breeze through. I have already mentioned Grants Office Communities, and I added it to the chat. If you have not signed up for a trial of Grants Office Communities, I encourage you to check that out. It is a great tool, and we are constantly making improvements to it. We just launched it in the last couple of months and we are constantly making improvements to it, so it is a good time to get into that.

Aside from Grants Office Communities for finding funding opportunities — and I want to mention too that Kate, our intrepid webcast producer, has made sure that all these QR codes actually work. As you go through, if you want to just download the PDF from the resources page, all these QR codes will work.

There is tons of free information that is available on grantsoffice.com — videos and articles. You can sign up for our monthly or quarterly magazine, FUNDED. So lots of great information that is there, including information that is helpful to experienced grant seekers, so check that out.

And then our services: we have a number of paid services, which cover most of the elements of grant-seeking, from research and consultation all the way up through reviewing your proposal or full proposal development.

When to Hire a Grant Writer or Consultant

Michael Paddock:
I think that actually answers one of the questions that has come in, which was: at what point should an organization consider hiring a dedicated grant writer or a consultant?

I think the answer is: like anything else that is not constantly working — you may have five grants due on the same day, and then three months go by and there are no grants due. Anytime there is a lot of

variation in terms of the workload, it is a good idea to outsource it until you know that you definitely can fill a full-time person's workday. At that point, it might be a good idea to hire a full-time grant writer.

In terms of hiring a grant-writing consultant, really any time up to that point — whether you are small and you do not have any grant-writing capabilities, whether you want to just outsource grant writing and focus on the project development, the internally focused, working-with-staff stuff that grants professionals can do because they are internal to the organization and they are more adept and more well-positioned to do all that — that is all things you have to take into consideration when you are considering whether you want to insource, outsource, or hire a grants professional.

Upcoming Webinar

Michael Paddock:
Okay, and then one more quick note before we go: we have another class coming up on May 26 on Mastering Indirect Costs. Indirect costs have been subject to a lot of conversation and a lot of heartburn, particularly for those institutions that get a lot of indirect costs, like universities. We will be talking about some advanced strategies for dealing with indirect costs as well.

Closing

Michael Paddock:
Okay, well, with that, I want to very much thank Amber Walker for presenting this session with me. Thanks, Amber — great job. And to all of you, I want to thank you for your participation and your time today. We went a little over what we expected in terms of time, so thanks to those who stuck with us, and we will look forward to seeing you again on a future webcast. Have a great day, everybody.

— End of Transcript —

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