Grant Writing Guide for Community Organizations & Partners
Getting Started: The Application Process

Grant Writing Team: Who are the members of your grant writing team?
_____________________________________________________________________________________
_____________________________________________________________________________________

Strengths: What are strengths you and your team bring to the grant writing process that you can build upon?
_____________________________________________________________________________________
_____________________________________________________________________________________

Areas of Challenge: What are areas of challenge you and your team should be aware of when grant writing?
_____________________________________________________________________________________
_____________________________________________________________________________________

Program/Project Description

Gather Information: Who is the target audience? What is the observed need? Why are you and your team qualified to do this work?
_____________________________________________________________________________________
_____________________________________________________________________________________
_____________________________________________________________________________________

Needs Assessment: What is the gap (or problem) and rationale for the proposed program/project plan?
_____________________________________________________________________________________
_____________________________________________________________________________________

Tell Your Story: What is the detailed program/project narrative and concept you would like to be funded? What is the timeline for completion that addresses the need? What is the intended impact of the program/project?
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**Goals and Objectives**

**Goals:** What are the clearly stated S.M.A.R.T. (Specific, Measurable, Attainable, Realistic, and Timely) goals of the project/program and how do they connect to your needs assessment?

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**Budget**

**Eligible Expenses:** What are the eligible expenses according to the grant regulations?

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**Line Items:** What are the specific line items you will include in your budget and how will you justify them?

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Evaluation

**Measures:** How are you going to measure whether or not you are meeting the goals and objectives of the grant? Will you conduct surveys, interviews, other forms of data collection (e.g. track meetings, consults, events, activities)?

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**Reporting:** At what frequency will you evaluate your project/program effectiveness? What tracking and reporting tools will you utilize?

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# Sample Grant Rubric

<table>
<thead>
<tr>
<th>Project Name: ______________________________________</th>
<th>Reviewer: ______________________</th>
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<tr>
<td><strong>Score</strong></td>
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<th><strong>Score</strong></th>
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<td>Description is clear, concise, and easy to understand.</td>
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<td>Description does not explain project concisely, or it does not give a general picture of the proposed activities.</td>
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<td>Description is hard to understand, verbose, or utilizes a lot of field-specific jargon.</td>
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<tr>
<td>The proposed project contains original, innovative, or creative aspect(s).</td>
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<td>The project contains no or few original, innovative, or creative aspect(s).</td>
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<td>It is not clear that the project is creative or innovative.</td>
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<th><strong>Score</strong></th>
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<td>Timeline is suitable for and meets all the activities described.</td>
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<td>Timeline appears to meet only a few of the activities proposed.</td>
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<td>Timeline is not suitable for the activities described.</td>
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<th><strong>Comments</strong></th>
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<th><strong>Score</strong></th>
<th><strong>Comments</strong></th>
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<tr>
<td>The goals of the project are not clearly stated.</td>
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<th><strong>1</strong></th>
<th><strong>Score</strong></th>
<th><strong>Comments</strong></th>
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</thead>
<tbody>
<tr>
<td>Budget is clearly explained and is appropriate for the activities proposed.</td>
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<td>Budget is clearly explained but is not appropriate for the activities proposed.</td>
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</tr>
<tr>
<td>Budget is not clearly explained and it is not appropriate for the activities proposed.</td>
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**Total Score**

Additional Comments:
Additional Tips

- Grant writing is a TEAM EFFORT! Have both internal and external folks review your application.
- ALWAYS assume it’s going to take you longer to write the application than you think.
- Before applying, understand what are ‘allowable’ and ‘non-allowable’ expenses. Many times, salaries are not allowed!!! Plan accordingly.
- Don’t “chase the money.”
- Read the FAQs
- Answer the questions directly and simply
- Reviewers are not looking for prose and recognize exaggeration
- Be realistic – don’t overpromise
- Make sure you are ‘telling your story’ in detail. What’s working? What’s not? How is this money going to help you improve service delivery, access, quality?
- Proofread your final submission
- Get a letter of support from local elected officials (e.g. State Legislator, County Commissioner). Consider providing them with a sample letter that they can cut and paste on their letterhead.
- Ask for a conversation with the funder. Get guidance – are we on the right track?
- Attend all trainings offered by the funding agency
- Consider sitting on a review committee for other grants. This can give key insight into what funders are looking for, what is considered a solid application vs. an underdeveloped application.
- Make sure you are prepared to measure outcomes and deliverables. You will need to report this back to the funding agency.
- Be willing to send a grant announcement to another community organization if it doesn’t meet your particular needs/wants. This helps build partnerships, and hopefully the favor will be returned in the future.
- If you are denied funding, ask the funder what you could have done better. How can I improve in the future?
- If you are given partial funding, adjust your deliverables accordingly. (i.e. if you apply for $50,000 but only get $25,000, don’t expect to accomplish the same thing with half the money!!!)
- Do you have a fiscal agent that will track the money in and out? Identify this person, especially if it’s a very large grant.

Tips adapted from information presented at the Lebanon Valley Chamber Non-Profit Roundtable - Aug. 16, 2022
Crowdsourcing – Where do you go to apply for grants?

- Patient-Centered Outcomes Research Institute (PCORI)
- National Institutes of Health (NIH)
- Grants.gov
- Centers for Disease Control & Prevention (CDC)
- US Dept of Housing & Urban Development (HUD)
- Health Resources and Service Administration (HRSA)
- American Rescue Plan Act
- American Heart Association
- Pennsylvania Department of Health
- Pennsylvania Department of Education
- Richard King Mellon Foundation
- York County Community Foundation
- Local school districts
- Community organizations
- Health systems
- Service clubs
Helpful Resources for Grant Writing


How to Apply: https://www.cdc.gov/grants/applying/index.html

How to Develop and Write a Grant Proposal: https://crsreports.congress.gov/product/pdf/RL/RL32159

Grants Learning Center: https://www.grants.gov/learn-grants.html

Grant Proposals (or Give me the money!): https://writingcenter.unc.edu/tips-and-tools/grant-proposals-or-give-me-the-money/

Proposal Development - Penn State College of Medicine Research (psu.edu)

Grant Proposal Template: https://www.pandadoc.com/grant-proposal-template/
Welcome and Introductions

• Welcome everyone! We are so glad you are here!

Community Health Equity & Engagement Research (CHEER) Team

Paula Moodie, MSW
Project Manager

Andrea Murray, MPH
Director of Community Engagement

Jennifer Poger, MEd
Director of Education

Jess Schrodel, MEd
Project Manager
Guest Presenters/Panelists

Nikki Maurer Gray, MPH
Executive Director
Community Health Council of Lebanon County

William Calo, PhD, JD, MPH
Assistant Professor
Penn State College of Medicine Department of Public Health Sciences

Rachel Mosbacher, MPA
Senior Program Officer, Eugene Washington PCORI Engagement Awards Program
Logistics

- This presentation is being recorded.
- Please raise your "hand" to ask questions.
- Please use the chat feature to make comments, share resources, and make connections!
- Breakout session materials link will be provided in chat (utilizing Google Doc)
- Presentation materials will be shared post-session.
Agenda

• Networking Breakout Session
• Fundamentals: The what, why, and how of successful grant writing
• Guest Presenters:
  • Nikki Maurer, MPH
  • William Calo, PhD, JD, MPH
• Small Group Activity
• Q&A
  • With guest presenters and guest panelist Rachel Mosbacher, MPA
Learning Goals
& Objectives

• Participants will learn what is a grant and why it is beneficial to apply for a grant.
• Participants will be able to identify key components of the grant application.
• Participants will understand an overview of how to write a grant.
• Participants will identify resources for help with grant writing.
Networking Breakout Session

In small groups, let’s get to know each other: Session Materials - Breakout #1

• Meet and greet
• What’s your level of experience with grant writing?
• Have you had success in securing grants? If so, please describe.
• What is your motivation for applying for a grant(s)?
• What do you find challenging about applying for a grant(s)?
Fundamentals

The What, Why, and How of Successful Grant Writing
What exactly are grants and who provides them?

- Grants are financial awards given to organizations and/or individuals to perform projects/programs.

- Most grants are given by:
  - Federal agencies such as the National Institutes of Health (NIH), Centers for Disease Control and Prevention (CDC), and the Health Resources and Services Administration (HRSA)
  - State Departments such as the Dept. of Health, Dept. of Education
  - Non-profit organizations such as the Patient-Centered Outcomes Research Institute (PCORI)
  - Foundations or agencies
  - Businesses
Why should community partners apply for grants?

• Impact on the community
• Build partnerships and share ideas
• Highlight key aspects/needs of the community you serve
• Achieve professional or personal growth
The Grant LifeCycle

Pre-Award Phase

Award Phase

Post-Award Phase

The Pre-Award Phase

Made up of two parts:
1. Funding Opportunity Announcement
2. Application Review Process

Funding Opportunity Announcement – Important Considerations

- Be sure to read carefully over the entire grant (“funding opportunity”) announcement, including any additional documents.
- What are important dates for the grant application and life cycle?
- What are the eligibility requirements?
- Is the description and objectives of the grant a good match for you and your organization's goal(s)?
- Does the funding allotment cover all costs associated with the project? Is cost-sharing a good option?
- What are the application requirements and required supporting documents?

Time to Write!
Main Sections of Grant Application

1. Applicant Information
2. Program/Project Description
3. Goals & Objectives
4. Budget
5. Evaluation

Adapted from Penn State Hershey PRO Wellness Center Presentation "Effective Grant Writing Developing a Stand-Out Grant Application, March 18, 2015"
Section 1: Applicant Information

- Carefully read all of the instructions
- Complete each field/question
- Check and double-check your information

Adapted from Penn State Hershey PRO Wellness Center Presentation "Effective Grant Writing Developing a Stand-Out Grant Application, March 18, 2015
Section 2: Program/Project Description

• **Gather Information** – Who is the target audience? What is the need? Why are you qualified to do this work?

• **Needs Assessment** – An observed need that strengthens an application by presenting a gap or problem and a rationale for the proposed project/program plan

• **Tell Your Story** – Clearly describe in detail the project/program you wish to be funded that includes a timeline for completion and addresses the need

Adapted from Penn State Hershey PRO Wellness Center Presentation "Effective Grant Writing Developing a Stand-Out Grant Application, March 18, 2015"
The Diverse Student Champion Program purposefully links UiM students (mentees) with individual sources of support (mentors/champions). Students are connected with interested champions of diverse cultural and ethnic backgrounds, who are faculty and alumni of the Penn State College of Medicine, and/or senior residents employed by the Penn State Health system.
The Diverse Student Champion Program (DSCP) purposefully links students considered underrepresented in medicine (UiM) with individual sources of support. The DSCP follows guidance from The American Academy of Medical Colleges (AAMC), which defines individuals considered UiM as “those racial and ethnic populations that are underrepresented in the medical profession relative to their numbers in the general population.” Because the makeup of the general population in the U.S. is constantly changing, the AAMC’s statement aims to be reflective of the fluctuating demographics of both the current population and the medical profession specifically. Presently, those racial and ethnic populations that are considered UiM and thus will be served by the Champion Program include: Black/African-American, Hispanic/Latinx, or Native American (American Indian, Native Hawaiian, Alaskan Native, mainland Puerto Rican). Based on data from the U.S. Census Bureau, Asian Americans are considered underrepresented in the Central Pennsylvania area. As such, students of Asian-American backgrounds will also be served by the Champion Program.

Students who identify as UiM and express interest in the DSCP will be connected with interested champions (mentors) of diverse cultural and ethnic backgrounds. Mentors will be faculty and alumni of the Penn State College of Medicine, and/or senior residents employed by the Penn State Health System.
WHEN WRITING YOUR PROGRAM DESCRIPTION:

- **Describe and DEFINE the population.** Do not assume the reader knows the population you intend to serve.
- **Avoid using acronyms** that are commonplace in your field or organization.
- **Make a connection** to the geographic area in which you work. Why is your proposed program important HERE?
- **Link your program** with benefits to the broader/collective population overall. Think: is there opportunity to shift a collective mindset(s)? Is this a potential stepping stone for future work of a larger scope?
- **Follow the directions!** Abide by format and word count guidelines. Cite references when appropriate.

https://www.ctdatahaven.org/articles/guide-grantwriting-conducting-needs-assessment
Section 3: Goals and Objectives

• Connect the goals you would like to accomplish to your needs assessment
• Keep your goals S.M.A.R.T.
  • Specific, Measurable, Attainable, Realistic, and Timely

20% of participants served who do not have a secondary school diploma or equivalent, will receive a secondary school diploma or equivalent within two years of enrolling in Educational Support Program (ESP).

Offer 36 families with children and/or youth ages 4-18 opportunities to participate in free hybrid cooking classes and tennis clinic programs through three-week sessions (Spring-Summer 2023).

Adapted from Penn State Hershey PRO Wellness Center Presentation "Effective Grant Writing Developing a Stand-Out Grant Application, March 18, 2015
Section 3: Goals and Objectives – Data

- Has the funder outlined specific expectations for data collection?
- Your data collection goals should be tied to your goals and objectives
- Utilize existing data where possible

Adapted from Penn State Hershey PRO Wellness Center Presentation "Effective Grant Writing Developing a Stand-Out Grant Application, March 18, 2015"
Section 4: Budget

• Perform a cost-analysis – be realistic with expenses and their justifications
• What is the eligibility of expenses according to the grant regulations?
• Is the cost sustainable over the duration of the project?
• Is cost-sharing an option?
• Other back-up plan(s)?
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<td><strong>$126,079</strong></td>
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</tbody>
</table>
Budget Justification – Common Mistakes

• Lacks specificity (e.g., listing a budget line item without any description as to what it is for, what it would be used for, and how that amount was calculated)
• No justification provided for the budget line items
• Difficult to read and out of order from your budget
• Numbers do not match the numbers in the budget
• Focuses too much on smaller costs rather than allocating appropriate explanations for bigger expenses.

https://www.instrumentl.com/blog/what-is-a-budget-narrative
Budget Justification Examples

**Study Visit Location- $85,000** is requested to reserve clinic space to see patients for the research study.

**VERSUS**

**Clinical Research Center costs: $59,737** is requested to cover the costs of using the Penn State Clinical Research Center (CRC). $40.50/visit * 1,475 CRC visits (This includes 315 screening CRC visits and 1,160 study CRC visits (290 subjects x 4 study visits at baseline, 8 weeks, 6 months and 12 months). The CRC serves as a home for clinical research. On a fee for service basis (with discounted rates for NIH-funded studies and trainees), the CRC provides expert nursing care, equipment and state of the art facilities, physician oversight and consultations regarding study protocols. Having a dedicated CRC at Penn State Health and College of Medicine to conduct clinical research is central to promoting patient safety as well as providing high quality equipment and trained staff to obtain data.

Adapted from Penn State SMaRT Orientation Presentation Session Handout “Grant, Contract & Budget Development – Sample Budget Justification”, May 2021
Budget Justification – Strengths

• Follows same order as budget, listing major costs and their explanations, salaries and wages, equipment, materials and supplies, and any travel conducted
• Gives additional details to explain all costs included in the budget
• Is easy to read and follow
• Is concise
• Numbers match the numbers within the budget
• Only includes budgeted items

https://www.instrumentl.com/blog/what-is-a-budget-narrative
Section 5: Evaluation

• How are you going to measure whether or not you are meeting the goals and objectives of the grant?
• Will you conduct surveys, interviews, other forms of data collection (e.g. track meetings, consults, events, activities)?
• Are you prepared to put this together in a report for the funder?
• Nikki Maurer shares experiences working on grant writing as community partner.
• Dr. William Calo talks about partnering with United Way 211 for a successful grant-funded project.
Nicole Maurer, MPH

Executive Director
The Community Health Council of Lebanon County was established in 1994, bringing together stakeholders from across the community to discuss common health goals and collaborative opportunities.
THE TYPE OF WORK WE DO

Aging  Behavioral Health  Homelessness
Food Access  Physical Activity  Violence Prevention

THE TYPE OF GRANTS WE LOOK FOR

Federal or CDC  Corporate  State  Private

Tobacco and Alcohol Prevention and Cessation

COMMUNITY HEALTH COUNCIL OF LEBANON COUNTY
Collaborative Writing Process

- Trust
- Clearly defined responsibilities
- Realistic deadlines
- Frequent checkins
Timeline and Common Tasks

1. Initial meeting to explore grant
   - Decide on the basic principles of the proposal

2. Create grant template on collaborative software
   - Make sure everyone has permissions and knows how to use

3. Basic Build
   - Copy and pasting session

4. Writing
   - 1 official writer
   - 1 editor

5. Budget
   - Usually separate worksheet

6. Supplemental Materials
   - LOS
   - Non-profit documents

7. Executive summary

8. Load and submit
   - One person with double-check

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Timeline and Common Tasks
Tips and Tricks

- Read the grant carefully
- Writing – Google Docs
- Budget – Google Sheets
- Understand Rubric
- Know the submission tool
- Single editor – cohesive voice
Final Thoughts

- Be prepared
- Know what you’re looking for
- Apply apply apply
- Ask for feedback
- Keep a calendar of opportunities
Community Grant Writing Workshop: A successful CBO partnership

August 30, 2022

William A. Calo, PhD, JD
Assistant Professor
Department of Public Health Sciences

PennState
Overview of Project

**Funding:** CTSI Bridges to Translation IV pilot grant

**Partners:** United Way of Southwestern PA’s 211 Helpline (PA211SW) and the PA Department of Drug and Alcohol Programs (PA DDAP)

**Study Goals:**

1) Adapt a set of clinical risk assessment tools to be implemented in a community setting (PA211SW helpline) to identify individuals at greater risk of diseases of despair

2) Test the feasibility of a community-to-clinic referral approach for diseases of despair in the PA211SW helpline
Community Partners & Their Roles

PA211SW
• Participated in development of risk assessment tool (Aim 1)
• Implemented risk assessment tool in workflow (Aim 2)
  • CPRET
  • Recruited potential participants
• Data exchange (Aim 2)

PA DDAP
• Participated in development of risk assessment tool (Aim 1)
• Updated list of referrals for drug and alcohol use services (Aim 2)
Steps to Maintain a Mutually Beneficial Partnership

- Create buy-in at start of project
  - What methods/training can be used to create a sense of ownership?
  - CPRET training and behavioral rehearsals

- Open and frequent two-way communication throughout project

- Monthly meetings to keep partners informed on progress and get their feedback on study activities
Steps to Maintain a Mutually Beneficial Partnership

• Identify partners’ needs and the impact participating is having on their operations
  • Will their staff need a considerable amount of time to complete study activities?
  • Write in funds to support their efforts.

• Ask if there are deliverables that partners would like to get from your project
  • Is an educational product being developed as part of the work? Would the CBO staff like to know the outcome of the study via a general audience brief report?
From a Pilot to a Trial

• Pilots are a great opportunity to be creative
  • Do you have a potential research question for a larger study or slightly different study?
  • You can include exploratory questions in your pilot data collection
  • Give priority to your partners’ question ideas

• Establishing strong community relations is key!
  • Include partners in future projects, even if it’s as a community advisor for a different topic
  • Connect with your partners every time you can
Grant Writing Tips & Tricks

• Involve community partners EARLY
  - Important for LOS and their feedback to help inform the study design

• Figure out your CBO’s past experience partnering with researchers
  - Have they ever participated in research before?
  - They may not realize the time effort and needs to be a partner, you’ll have to make sure you build their buy-in to establish the capacity to complete the study.

• Consider your study’s budget
  - Does you CBO need a stipend or financial support to participate?
  - If so, establish your CBO’s budget plan first and align it to the project’s scope and number of community partners.
Small Group Activity

Your group has 15 minutes to review the recent PCORI (Patient-Centered Outcomes Research Institute) grant funding announcement and answer the ten questions listed in the session materials link below. Please select one team member to write or type out your group's answers. The questions are designed for you and your team to search through and become familiar with the funding announcement.

Session Materials - Breakout #2

Good luck!
Small Group Activity - Debrief

What was this experience like?
Q & A

Nikki Maurer Gray, MPH
Executive Director
Community Health Council of Lebanon County

William Calo, PhD, JD, MPH
Assistant Professor
Penn State College of Medicine Department of Public Health Sciences

Rachel Mosbacher, MPA
Senior Program Officer,
Eugene Washington PCORI Engagement Awards Program

Andrea Murray, MPH
Director of Community Engagement
Penn State College of Medicine
Upcoming CHEER Programming

**Penn State CTSI Translational Science Seminar Series - Community Engagement Across Penn State: Landscape and Resources to Support Community-Academic Partnerships**
September 29, 2022 [Register HERE](#)

**Introduction to Community-Engaged Research: What, Why, and How to Get Involved**
October 2022 – details to be sent shortly!

**Overcoming Barriers in Community-Academic Partnerships**
December 2022
Contact Us

Community Health Equity & Engagement Research (CHEER) Initiative
Penn State College of Medicine
90 Hope Drive
Hershey, PA 17033
CHEER@pennstatehealth.psu.edu
Discussion Questions from the Community Grant Writing Workshop (August 30, 2022):

1.) Could a list of community grants or grant organizations be made available for the course?  
   Andrea Murray, Penn State: Yes, we will be providing information including a comprehensive list of where organizations can look to apply for grants. Please see our enclosed Grant Writing Guide for crowdsourced websites of where to go to apply for grants.

2.) I have a project that is in its really early stages. If I have a few things that *might* apply to the funding announcement (but not entirely), should I still apply for that grant?  
   Rachel Mosbacher, PCORI: We encourage “Program Fit Calls” to tell you how your program might align with the funding announcement, or might not align. If there is flexibility in your concept, you might be able to adapt it to align. If there is a misalignment, then it may not be the best use of your time. But before you jump in, it’s a good idea to talk with someone who works in the program to determine if it’s compatible. That will help you determine if it’s worth the investment of time.

3.) Do you have to have a non-profit or for-profit business for grants? Is it best to have a non-profit or for-profit organization?  
   Andrea Murray, Penn State: You don’t necessarily have to have non-profit status to apply for a grant. You want to make sure that you read the proposal and see if the grant is meant for non-profit organizations. In community-engaged research, we encourage all sectors of a community to be part of that writing process and part of your writing team.  
   Rachel Mosbacher, PCORI: The question depends on what you are applying for. In the case of our funding opportunities, you have to be an organization (vs. an individual). If you are looking to apply on behalf of an organization, that might be acceptable – whether you are non-profit or for-profit. In the case of an individual, you might have to ‘incorporate’ yourself to make yourself into a very small non-profit. Just some things in the fine print to look out for.

4.) What is the best time of year to search for grants? Or IS there a best time of year to search for grants?  
   Rachel Mosbacher, PCORI: You want to keep a pulse on if there are funders that you think might be appropriate for your ideas. Sometimes there will be opportunities that are open year-round. Often times, there will be funding cycles that will repeat themselves year after year. For our program, we have two cycles per year: one in the spring and one in the fall. If you look back at what the funder has done in the past, you can anticipate what the cycles each year will look like.  
   Nikki Maurer Gray, Community Health Council of Lebanon County: It seems like a lot of funders want their funding to begin at either the beginning of the fiscal year (July 1) or the beginning of the calendar year (January 1). Lots of grant opportunities seem to open in March and September, but it depends.

5.) How can we create an app for our business?  
   William Calo, Penn State: We have people at CTSI that can help with business development.  
   Jennifer Poger, Penn State: The Penn State Harrisburg LaunchBox would be a good starting point. Reach out to the CHEER team at CHEER@pennstatehealth.psu.edu and we would be happy to make a connection for you!