# 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?

### **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?

#### Budget

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

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

### **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)?

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

### Sample Grant Rubric

Project Name: \_\_\_\_\_\_

Reviewer: \_\_\_\_\_

	5	4	3	2	1	Score	Comments
Project Narrative Project Concept	Description is clear, concise, and easy to understand. The proposed project contains original, innovative, or creative		Description does not explain project concisely, or it does not give a general picture of the proposed activities. The project contains no or few original, innovative, or creative aspect(s).	2	Description is hard to understand, verbose, or utilizes a lot of field- specific jargon. It is not clear that the project is creative or innovative.		
Practicality of Timeline	aspect(s). Timeline is suitable for and meets all the activities described		Timeline appears to meet only a few of the activities proposed.		Timeline is not suitable for the activities described.		
Project Impact	Project impact is clearly aligned with the grant's goals and makes strong connections in the narrative.		Project impact seems to align with the grant's goals but does not make a clear connection in the narrative.		Project impact does not clearly align with the grant's goals and/or the narrative does not explain the connection.		
Project Goals	The goals of the project are clearly stated and are aligned with grant's purpose.		Goals seems to be aligned with grant's purpose but are not clearly stated.		The goals of the project are not clearly stated.		
Budget	Budget is clearly explained and is appropriate for the activities proposed.		Budget is clearly explained but is not appropriate for the activities proposed.		Budget is not clearly explained and it is not appropriate for the activities proposed.		
					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
- □ <u>Centers for Disease Control & Prevention (CDC)</u>
- US Dept of Housing & Urban Development (HUD)
- Health Resources and Service Administration (HRSA)
- American Rescue Plan Act
- <u>American Heart Association</u>
- Pennsylvania Department of Health
- Pennsylvania Department of Education
- <u>Richard King Mellon Foundation</u>
- York County Community Foundation
- Local school districts
- □ Community organizations
- Health systems
- Service clubs

#### **Helpful Resources for Grant Writing**

Grants 101: https://www.grants.gov/web/grants/learn-grants/grants-101.html

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

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

Grants Learning Center: <a href="https://www.grants.gov/learn-grants.html">https://www.grants.gov/learn-grants.html</a>

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

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

Grant Proposal Template: <a href="https://www.pandadoc.com/grant-proposal-template/">https://www.pandadoc.com/grant-proposal-template/</a>

## Grant Writing for Community Organizations and Partners

August 30, 2022





This project was supported, in part, by funding from Penn State's Social Science Research Institute (SSRI). Content is the responsibility of the authors and does not represent the views of the SSRI.

### 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





**PennState** Social Science Research Institute

## 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



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# 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



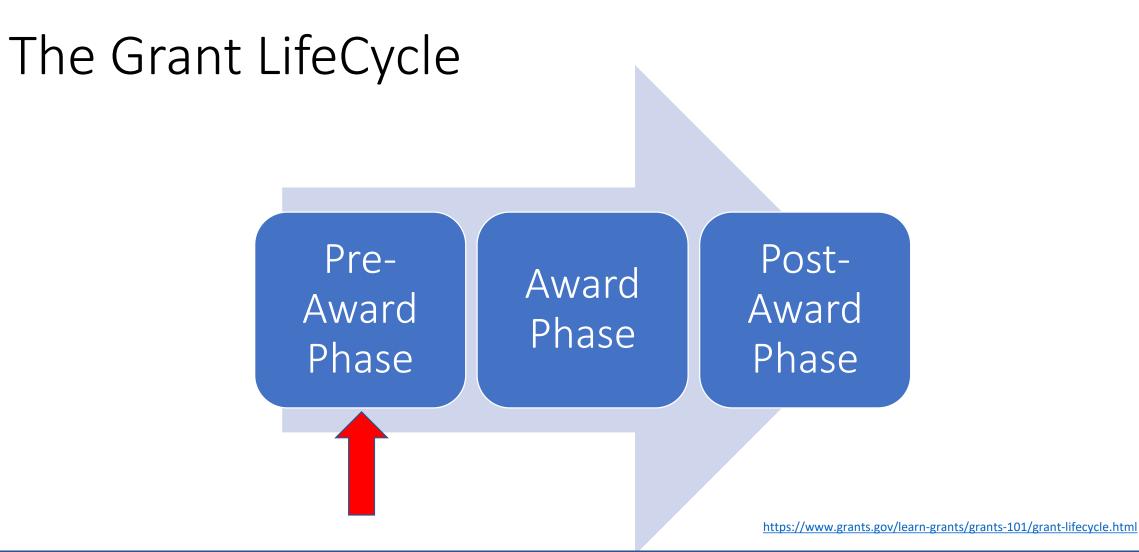


Why should community partners apply for grants?

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











## The Pre-Award Phase

Made up of two parts:

- 1. Funding Opportunity Announcement
- 2. Application Review Process

https://www.grants.gov/learn-grants/grants-101/grant-lifecycle.html





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?

Federal Grants 101 Webinar, 3/3/22: https://www.youtube.com/watch?v=80-pG\_tFDb4





## Time to Write! Main Sections of Grant Application







## Section 1: Applicant Information

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





## 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





## Program Description Case Study

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.





## Program Description Case Study

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.



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## Program Description – Key Takeaways

### 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.







## 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).





## 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





## 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)?





Study Budget	Unit cost	Number/hours	Budgeted
Personnel			
Community Director	\$40	800	\$32,000
Participant Compensation			
Focus group participants	\$50	30	\$1,500
Survey participants	\$50	200	\$10,000
Scholarship			
Manuscripts, conferences	\$2 <i>,</i> 600	1	\$2 <i>,</i> 600.00
Marketing and Advertising			
Social media (per paid post)	\$200	5	\$1,000
SUBTOTAL			\$47,100
F&A			
F&A tracked by FA (.6218*direct cost)			\$29,287
Total			\$76,387





	Study Budget	Unit cost	Number/hours	Budgeted
	Personnel			
	Community Director	\$40	800	\$32,000
	Community Coordinator	\$15	1000	\$15,000
	Community Health Worker	\$20	250	\$5 <i>,</i> 000
	Participant Compensation			
	Focus group participants	\$50	30	\$1,500
	Survey participants	\$50	200	\$10,000
	Misc.			
	Transcription Services (per			
	transcript)	\$30	20	\$600
	Statistician Service	\$50	70	\$3,500
	Focus Group Refreshments	\$35	4	\$140
	Scholarship			
	Manuscripts, conferences	\$2,600	1	\$2,600.00
	Travel			
	Travel to sites (per visit)	\$30	20	\$600
	Marketing and Advertising			
	Social media (per paid post)	\$200	5	\$1,000
	Promotional items and printing	\$3,000	1	\$3,000
	Event advertising	\$500	1	\$500
	SUBTOTAL			\$81,440
	F&A			
DoppState	F&A tracked by FA (.6218*direct			
PennState	cost)			\$50.639
Clinical and Translational Science Institute	Total			\$126,079





## 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?





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

## Grant Writing In-Action

- 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

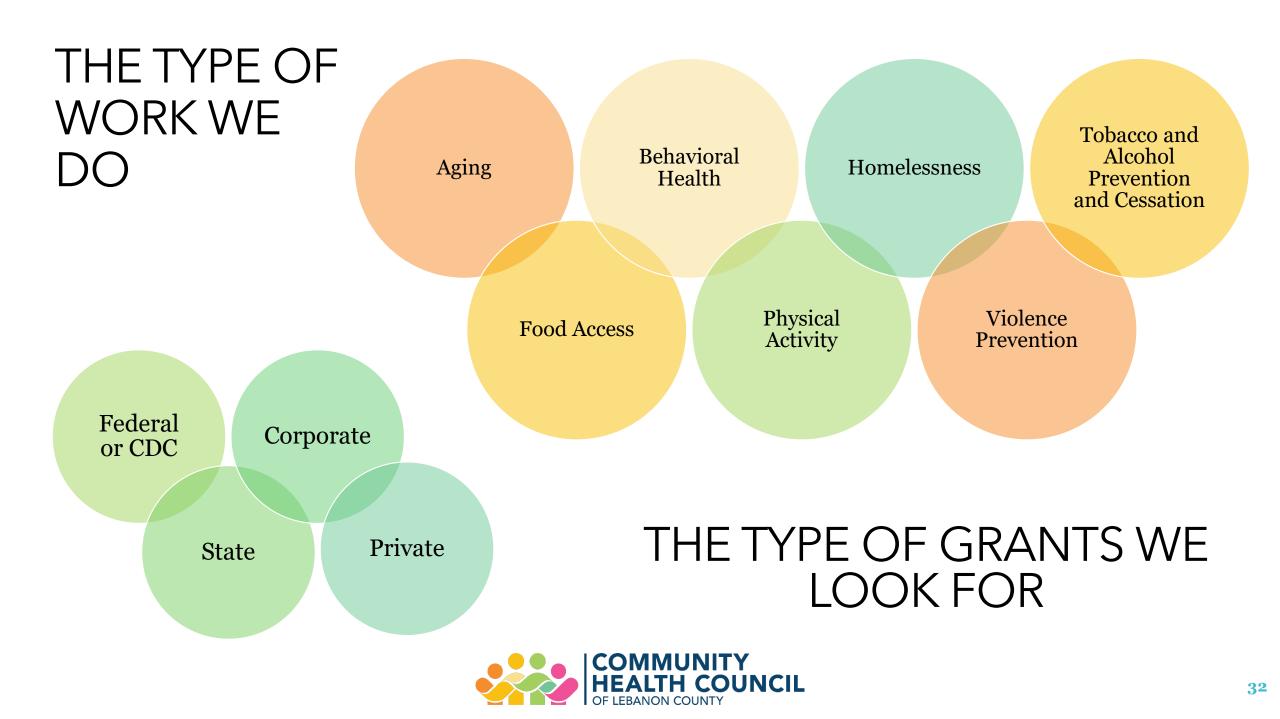
**Executive Director** 



# COMMUNITY EALTH COUNTY OF LEBANON COUNTY

#### BACKGROUND

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.





#### **Collaborative Writing Process**



## Timeline and Common Tasks



Read the grant carefully



#### Tips and Tricks



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



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### 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** <u>Register HERE</u>

**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







#### **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? <u>Andrea Murray, Penn State</u>: 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 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?

<u>Rachel Mosbacher, PCORI</u>: 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?

<u>Andrea Murray, Penn State</u>: 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.

<u>Rachel Mosbacher, PCORI</u>: 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?

<u>Rachel Mosbacher, PCORI</u>: 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. <u>Nikki Maurer Gray, Community Health Council of Lebanon County</u>: 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?

<u>William Calo, Penn State</u>: We have people at CTSI that can help with business development. <u>Jennifer Poger, Penn State</u>: The <u>Penn State Harrisburg LaunchBox</u> would be a good starting point. Reach out to the CHEER team at <u>CHEER@pennstatehealth.psu.edu</u> and we would be happy to make a connection for you!