Thinking Like a Grant Reviewer

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About Diane H. Leonard, GPC

- Grant Professional Certified (GPC)
- Approved Trainer, Grant Professionals Association
- Began career as a grantmaker
- Over $55.4 million awarded for clients
- Owner, DH Leonard Consulting & Grant Writing Services, LLC
- Runner and coffee drinker

What We Will Cover Today:

I. Peer Review Exercise

II. Grabbing Your Reviewers' Attention

III. Writing a Compelling Application

IV. Why Grant Makers Advocate For You

V. Creating a Mock Review Process

VI. Discussion & Takeaways

I. Peer Review Exercise

Exercise Instructions (10 minutes)

1. Read the proposal provided.

2. Make notes on the proposal about:
   - Questions you have;
   - Comments about the proposal; and/or
   - Concerns.

You may not ask clarifying questions, you must provide feedback based solely on what you read in the document.

I. Peer Review Exercise

Exercise Instructions (10 minutes)

1. Gather in small groups based on the proposal you read.

2. Agree as a group on whether or not you will approve the funding request.

I. Peer Review Exercise Debrief

I. Peer Review Exercise

Top Reasons Proposals are Denied

1. The program does not meet the funder's priorities
2. The program is not located in the geographic area of funding
3. The proposal does not follow the required format

I. Peer Review Exercise

Top Reasons Proposals Are Denied

4. The proposal is poorly written and difficult to understand
5. The objectives and plan of action for the project greatly exceed the budget and timelines for implementation
6. There is insufficient evidence that the program can become self-sufficient after the grant is completed

II. Grabbing Your Reviewers' Attention

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The 3 R's

- Research
- Relationships
- wRiting

II. Grabbing Your Reviewers' Attention

Key Points to Research to Inform Relationships

1. Mission
2. Accepting Unsolicited Proposals
3. Geographic Restrictions
4. Previous Grantees
5. Average Grant Size
6. *Communication Preference/Capacity*
7. *Social Media*

II. Grabbing Your Reviewers' Attention

Example:

Better Buffalo Fund Program

II. Grabbing Your Reviewers' Attention

First Impressions – Contact!!

II. Grabbing Your Reviewers' Attention

- Create talking points based on research on potential funder
- Be prepared with talking points for in-person contact (funder forum, conference, etc.)
- Same talking points will work when connecting on the phone
- Same talking points will translate well to an email

II. Grabbing Your Reviewers' Attention

What to include in your talking points:

1 - *BRIEF* introduction of who you are & agency you are with
2 - Why YOU think that you are a strong potential funding partner (30 second elevator speech)
3 - Up to three *thoughtful* questions based on guidelines/research materials that having answers to will help you be more competitive in their process

II. Grabbing Your Reviewers' Attention

Continued Example

How to Apply

Complete and access an online application through New York State's Consolidated Funding Application (CFA).

Funding is offered periodically. **Contact Angela Rossi**, senior project manager, or call the Western NY Regional office at (716) 847-8200 to learn when the next funding round will be offered.

For detailed Market Bundle Fund guidelines, **download the PDF.**

Get answers to frequently asked questions (FAQs).

For additional information, email **angela.rossi@esd.ny.gov** or call (716) 847-8200.

II. Grabbing Your Reviewers' Attention

First Impressions – NO Contact

Sometimes your first impression can NOT be made until the review committee or board sits down to read your proposal.

How do you make them smile with what they read?

II. Grabbing Your Reviewers' Attention

- Provide concise narratives
- Write SMART objectives
- Don't leave them with unanswered questions
- Follow the requirements!

III. Writing a Compelling Application

III. Writing a Compelling Application

Telling *YOUR* story in a consistent manner across *ALL* application elements is your primary job.

III. Writing a Compelling Application

How do you keep a consistent story regardless of which required element is read first?

1. Executive Summary
2. Need Statement
3. Program Description
4. Evaluation
5. Organizational Capacity
6. Budget & Budget Justification
7. Attachments

III. Writing a Compelling Application

Customize *YOUR* story using the **priority language and funding motivations of each funder** to make the consistent story more compelling to the reviewer.

III. Writing a Compelling Application

Once you have a framework in mind for your application…

Ask yourself….

How can I present our complex data in a simplified manner?

III. Writing a Compelling Application

Sample Presentation of Data for Proposal:

III. Writing a Compelling Application

Great trick for custom images beyond Microsoft Excel or Google Sheets….

www.canva.com

(No, we're not affiliates, it is just an amazing tool!)

III. Writing a Compelling Application

Logic Model

III. Writing a Compelling Application

Example from funder:

Goal:					
Objectives/Activities	Responsible Staff/Partner	Completion Timeline	Measures of Performance	Outcomes	Costs

III. Writing a Compelling Application

Example from funder:

Grantee Name _____ Funds Requested _____

Goal I: Goal Statement															
Objectives	Activities	Timeline												Measures of Accomplishment	Person Responsible
		S	O	N	D	J	F	M	A	M	J	J	A		
	Activity 1:														
Objective 1:	Activity 2:														
	Activity 3:														
Objective Rationale:	Activity 4:														
	Activity 5:														

III. Writing a Compelling Application

VS

III. Writing a Compelling Application

What Story Does Your Budget Tell?

1. Know your program/project budget FIRST.

2. Have all of the justifications/formulas documented.

3. Customize your budget to the grant maker's form.

III. Writing a Compelling Application

Example from funder:

Grant Budget Format

Organizational fiscal year:
Time period this budget covers

EXPENSES

	Amount Requested		Total Project Expenses
1. Salaries			
2. Payroll Taxes			
3. Fringe Benefits			
4. Consultants and Professional Fees			
5. Insurance			
6. Travel			
7. Equipment			
8. Supplies			
9. Printing & Copying			
10. Telephone & Fax			
11. Postage & Delivery			
12. Rent			
13. Utilities			
14. Maintenance			
15. Evaluation			
16. Marketing			
17. Other (specify)			
Total amount requested	$0.00	Total project expenses	$0.00

III. Writing a Compelling Application

Example from funder:

REVENUE	Committed	Pending
1. Grants/Contracts/Contributions		
Local Government		
State Government		
Federal Government		
Foundations		
Corporations		
Individuals		
Other		
2. Earned Income		
Events		
Publications & Products		
3. Membership Income		
4. In-kind Support		
5. Other (specify)		
Total revenue	$0.00	$0.00

IV. Why Grant Makers Advocate For You

IV. Why Grant Makers Advocate For You

Who has served as a reviewer for a grant maker?

What did the experience teach you?

IV. Why Grant Makers Advocate For You

What are the variations in experiences?

- Staff led process with staff making the decisions
- Staff facilitated with committees making decisions
- Staff facilitated the board making decisions
- Staff scored then paired with board decisions
- Staff scored then board priority points were added

IV. Why Grant Makers Advocate For You

Reviewers Advocate for You When…

- They catch your enthusiasm
- They have belief in your capacity
- They see the potential for impact beyond dollars requested/time period funded

IV. Why Grant Makers Advocate For You

A true review committee story….

IV. Why Grant Makers Advocate For You

A true review committee story….

Reviewers Advocate for You by…

- Offering to seek additional information
- Asking committee/board members for further explanation about their opinion on the proposal
- Voicing their opinion during a meeting positively about their impressions

IV. Why Grant Makers Advocate For You

…If you want grant makers to advocate for you.

IV. Why Grant Makers Advocate For You

1. "We are not sure how we will continue the program after your grant funding ends."

IV. Why Grant Makers Advocate For You

2. "We hope to be able to…"

IV. Why Grant Makers Advocate For You

3. "We need your funding to continue to operate…"

IV. Why Grant Makers Advocate For You

4. Don't include buzz words, phrases, or industry jargon

- Innovative
- Cutting-edge
- Game-changer
- Unique (unless you are talking about the unique number of outputs in a logic model)
- Collaborative effort (without proof in the narrative to back up use of word)
- Cooperative (see above)
- Acronyms

IV. Why Grant Makers Advocate For You

5. Don't make overly ambitious outcome statements

"we will **eliminate** childhood hunger in Town XYZ."

V. Creating a Mock Review Process

V. Creating a Mock Review Process

We want to WIN…

…NOT hear:

"There were more strong proposals than there were dollars available in this funding round."

V. Creating a Mock Review Process

What sort of feedback does your request for feedback process often elicit?

"Looks great!"

"Fingers crossed!"

"I think you missed a comma in the third sentence in the fourth paragraph."

V. Creating a Mock Review Process

<u>The Difference Between Editing Versus Mock Review</u>

Editing	Mock Review
Grammar focused	Focused on review process of grant maker
Word choice focused	Focused on scoring rubric
Focused on opinions of editor	Focused on opinions of decision makers

V. Creating a Mock Review Process

Benefits of Mock Review

V. Creating a Mock Review Process

Example from funder:

Program Summary
Provide a 100 word maximum summary of your proposed program.

Narrative

1. **Need Statement** (3 points)
Describe the specific need you intend to address or problem(s) that the proposed program is intended to address.

2. **Target Population** (3 points)
Describe the demographics of the youth to be served by this program.
Include:
- number of youth to be served
- demographics of target population (age, gender, ethnicity, etc.)
- geographic area from which youth will be recruited

3. **Program Design** (7 points)
Indicate which Service Opportunity and Supporting your program is providing and which of the recommended Intermediate Goal & Objectives it relates to (see Appendix A).

Also include:
- Location of the program. Where will participant activities take place?
- Days and hours of operation (per activity).
- Months during which the program will operate (year round, school calendar, summer, etc.)
- Length of time youth will participate, is it open ended or do participants have program activities defined particularly if outcome has been attained.
- Does the program coordinate or collaborate with other community-based services to accomplish its mission.
- How this program differs from other similar programs/services available to the target population.

V. Creating a Mock Review Process

Example from funder:

V. Creating a Mock Review Process

Creating A Mock Review

1. Provide a scoring sheet/matrix for scores & comments based on RFP/NOFO

2. Select group of three colleagues to serve as mock reviewers that were NOT lead writers on the application

3. Provide 2- 3 days for mock review

V. Creating a Mock Review Process

Utilizing Feedback From A Mock Review

1. Take average of three scores

2. Make edits based on areas identified as needing clarification by reviewers

(As with comments from formal grant maker review, take comments into consideration, not as an absolute for success)

V. Creating a Mock Review Process

Digesting the Feedback

- Don't take the comments personally!
- Allow the lead writer time to overlay the score sheet comments onto narrative
- Decide in advance, who has the final say on incorporating edits

V. Creating a Mock Review Process

General Mock Review Tips

- Only submit proposals to mock review process that *could* be considered final and submitted
- Have multiple colleagues review (3 is ideal!)
- Create "false" internal deadlines
- Plan to submit EARLY

V. Creating a Mock Review Process

Objections from Colleagues/Clients

- Don't want to hurt the feelings of the lead writer
- Concerns about shortening the timeline for actually writing the application
- Current editing process is "fine"

V. Creating a Mock Review Process

Factors Influencing Proposals That Are Beyond Our Control

- Strength of other applications
- Pre-existing relationships between grant maker and other applicants
- Background and understanding of reviewers of the subject matter
- **Priority and bonus** points/factors added to decision making process

V. Creating a Mock Review Process

Regardless of Your Mock Review Process

When you are denied…

…find out why/get scores so you can improve!

When you are funded…

…after you do your grant happy dance….

…find out why/get scores so you can duplicate it.

V. Creating a Mock Review Process

Real Mock Review Example :

Community Anchors

Scoring

Project Justification

IMLS Review Criteria

- Is the project clearly explained?
- Is the community need, problem, or challenge to be addressed clearly identified and supported by relevant evidence?
- Are the people who will benefit from the project clearly identified, and have they been involved in planning the project?
- Are the ways in which this project advances the institution's strategic plan specific, actionable, and measurable?
- Does the project align with the MFA Community Anchors project category?

Project Justification Comments:

Project Justification Score: _____ (Out of 20)

V. Creating a Mock Review Process

Real Mock Review Example :

Scoring Criteria Category	Maximum Number of Points Available	Points Awarded During Mock Review
Need	35	
Impact	30	
Cost Effectiveness/Budget	30	
Readiness	5	
TOTAL	100	

Need: • Does the proposal provide sufficient benefits to an eligible target population (i.e., [illegible] or other risk, disadvantaged, or underserved populations or communities and levels of need in or more existing conditions or other challenges, risks, or outcomes and/or [illegible] Does the proposal clearly, in detail, and with relevant supporting evidence, show the Program's [illegible] Identify all eligible target populations and the unmet needs of the population. (Please include [illegible] Does the proposal provide sufficient benefits to an eligible target population (i.e., [illegible] or other risk, disadvantaged, or underserved populations or communities and levels of need in or more existing conditions or other challenges, risks, or outcomes and/or [illegible] Does the proposal clearly, in detail, and with relevant supporting evidence, show the Program's [illegible] Identify all eligible target populations and the unmet needs of the population. (Please include [illegible] Does the proposal provide sufficient benefits to an eligible target population (i.e., [illegible] or other risk, disadvantaged, or underserved populations or communities and levels of need in or more existing conditions or other challenges, risks, or outcomes and/or [illegible] Does the proposal clearly, in detail, and with relevant supporting evidence, show the Program's [illegible] Identify all eligible target populations and the unmet needs of the population. (Please include [illegible] Cost Effectiveness: Does the proposal demonstrate sound fiscal management and strong community support for this proposal? (For qualifies additional [illegible] Does the proposal clearly show how the proposed project addresses unmet needs. Including the use of local planning, process or other research data. Maximum 30 points.

V. Creating a Mock Review Process

Mock Review Template

Mock Scoring Review Generic Format

Connect With Me!

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Questions

Q&A

Think of a question afterward?

Email Diane at
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