

## 5. Identify an Appropriate Funding Source

Now that you have started to form:

- a more refined project idea;
- a wider awareness of the ecosystem of existing projects in your field;
- a sense of the national, local, or institutional demand for your project;
- and a clearer sense of the resources at your disposal

... the next step is to find an appropriate funding source. Below you will find some suggestions as to where to begin the search for funding. As you look for possible funders, below are some guidelines for the process:

1. Check federal, state, and local grant-making agencies, and local foundations for possibility of grants.
  - a) Federal agencies list all of their available grants on <http://grants.gov>. If you apply for a federal grant, you will need to set up an account. It is best to set this up in advance rather than at the last minute.
  - b) States also have opportunities for grants, such as state humanities councils.
  - c) Private foundations are also possible areas to look. The following sites may prove useful:
    - The Foundation Center: <http://foundationcenter.org/>
    - A Directory of State and Local Foundations: [http://foundationcenter.org/getstarted/topical/sl\\_dir.html](http://foundationcenter.org/getstarted/topical/sl_dir.html)
    - The Council on Foundations Community Foundations List: <http://www.cof.org/whoweserve/community/resources/index.cfm?navItemNumber=15626#locator>
  - d) The USDA offers a valuable *Guide to Funding Resources*, which includes links to potential government and private funding groups, as well as grant-writing resources: <http://www.nal.usda.gov/ric/ricpubs/fundguide.html#privatefunding>
2. Check your institution's eligibility for a potential grants before beginning the application process. Eligibility requirements and restrictions are often found in grant guidelines.
3. Review the types of projects this program funds, and consider how your project fits with the agency or foundation's mission and strategic goals.
4. Review a potential grant program's deadlines and requirements (including proposal requirements and format for submission).
5. Identify funding levels/maxes, and keep them close at hand as you develop your budget.

## 6. Scoping and Scheduling Work

What follows are several possible ways to organize your project's work plan. Project work plans are often organized in one of two ways: by the order of deliverables or by calendar year. This may be determined by a grant's application guidelines, so check to see if the grant you are applying for specifies a format for the work plan. You may want to look at examples of previous, successful grants for examples. Most federal grant agencies post vetted copies of previously awarded applications for this purpose.

### Preliminary Questions:

- 1 What is the period of performance for the project
- 2 Who are the key personnel, and what is their availability?
- 3 What are the resources available?

### Major Areas of Project Work:

- Planning and Research
- Content Development
- Technical Development
- Design
- Evaluation
- Outreach and Publicity
- Advisory Committee/Consultation with Outside Specialists

### Major Deliverables:

*Project plans that foreground the "deliverables" of the project keep the focus on what will be accomplished.*

- Deliverable 1:
  - Component:
    - Staff:
    - Resources:
    - Duration:
- Deliverable 2:
  - Component:
    - Staff:
    - Resources:
    - Duration:

## Work Plan Structure

### Calendar Driven

Year 1:

- Month:
  - Planning and Research
  - Content Development
  - Technical Development
  - Design
  - Evaluation
  - Outreach and Publicity
  - Advisory Committee/Consultation with Outside Specialists

Year 2:

- Month:
  - Planning and Research
  - Content Development
  - Technical Development
  - Design
  - Evaluation
  - Outreach and Publicity
  - Advisory Committee/Consultation with Outside Specialists

### Deliverable Driven

*Phase 1 (month/year - month/year):*

*Phase 2 (month/year - month/year):*

*Phase 3 (month/year - month/year):*

*Phase 4 (month/year - month/year):*

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# 7. Short Project Proposal

This is a template for writing a short project proposal to help you build partnerships with other institutions or pursue funding opportunities. Though this template does not directly reflect a specific grant narrative format, the short project proposal includes important project-development steps that can later form the basis for a wide variety of grant narratives.

## I. Project Details

- Title:
- Lead Applicant:
- Funding Opportunity:
- Proposal Deadline

## II. Abstract

150 word summary of project: (1 short paragraph)

## III. The Need

Statement of the conditions that make the project necessary and beneficial for key stakeholders: (2-3 paragraphs).

## IV. National Impact and Intended Results

Discussion of the work that will fill the need articulated above: (4-5 paragraphs)

## V. The Plan

Rough outline and project calendar that includes project design and evaluation, and possibly a communications plan, depending on the grant with major deliverables (bullet-pointed list of phases and duration):

- Phase 1 (month/year - month/year):
- Phase 2 (month/year - month/year):
- Phase 3 (month/year - month/year):

## VI. Project Resources: Personnel and Management

Description of the why the cooperating institutions and key personnel are well-suited to undertake this work (list of experience and responsibilities of each staff member, and institutional description).

## VII. Sustainability

If applicable, describe how this project will live beyond the grant period.

## 8. Forging Effective Partnerships

After brainstorming your project ideas and assessing your available resources, it is time to scope out potential partners to help fill in gaps and formalize relationships.

Please keep in mind that each project is different. What we have outlined here are suggestions that we have learned from successful and unsuccessful collaborations. While each project is unique in the way responsibilities are shared, perhaps one universal attribute of successful partnerships is mutual respect. The most successful collaborations are characterized by a demonstrated respect for each partner's time, work, space, staff, or policies in words and actions.

### Identify what you need:

- Once you know where you need help, start thinking about who know who might have those skills, areas of expertise, resources, and interest.
- Partnerships should be selected on the basis of specific strengths.
- If you don't know someone who fits the bill, can someone you know introduce you to someone you would like to know? Who do you know you need to find but don't know where to look?

### Find Collaborators:

- Attending conferences can be the best way to meet potential collaborators who share similar goals and passions. Informal gatherings are often the best place to chat with folks: "Birds of a Feather" dinners, or affinity group luncheons.
- Talk to a grant program office about your project; they may have some great recommendations.

### Communicate Effectively:

- Early on, establish communication norms: including regular meeting times, means for meeting (conference calls, Skype, Hangouts, et al), and best ways to communicating in-between meetings (ie, email only), and collect all preferred contact information and publish it somewhere accessible to the entire team.
- Use project management software for organizing project tasks, deadline, deliverable requirements that makes all of this information easily accessible and visible to project collaborators.
- If working with geographically-dispersed collaborators, be sure to schedule face-to-face meetings at a reasonable, yet, regular interval.

- Generally, treat all project team members with respect and engage in common courtesies.

**Stay flexible:**

- No project is able to anticipate all problems or challenges before they occur, but simply acknowledging that challenges may arise, and allowing time and budget for those challenges is helpful.

**Bad Marriages:**

- Not all collaborations work out as planned, even with the best of intentions.
- If there is a major breakdown in communications, or if relationships deteriorate, you may need to break apart partnerships.

## 9. What happens next?

### Now:

- Go home and talk to the stakeholders in your institution. Gather support now for approaching the next grant cycle.
- Continue filling out the short project proposal template.

### At least 3 months out from the due date:

- Conduct a more complete environmental scan.
- Meet with your institution's development staff to discuss project scope and to estimate a work plan. (You may want to compare the period of performance for the funding cycle and the actual timeline to complete the work.)
- Create a list of possible people to approach regarding letters of support.
- Contact prospective partners, and share your short project proposal with them.
- Set up an appointment with a grant program officer, and share your short project proposal with them.
- Read and review past, successful grants. Many agencies make examples of previously awarded grants available on their website. For example, IMLS makes sample grant applications available here: [http://www.ims.gov/applicants/sample\\_applications.aspx](http://www.ims.gov/applicants/sample_applications.aspx).

### 2 months from due date:

- Share with your internal and external collaborators a document that has sections for each of the grant guidelines to begin drafting.
- Assign primary writers for each section.
- Begin drafting, incorporating the background research you have already done through the short grant proposal writing process.
- Layout the work plan calendar with major milestones, deliverables, and the staff member responsible for that work.
- Draft a budget in cooperation with your development office/office of sponsored programs.
- Plan what supporting appendix materials (case studies, mock-ups, user scenarios) you plan to include with the grant application.
- Create a master checklist for all required pieces of the proposal, including who is responsible for completing each piece.

**1 month from due date:**

- Continue drafting the grant narrative.
- Consider questions that potential reviewers might ask.
- Draft and compile the materials for the appendices.
- Request letters of support to include with your application. Consider including a draft letter that is specific to the project and the letter writer.
- Finalize the budget. (Don't forget to secure the necessary cost-share contribution.)
- Draft a budget narrative that accounts for staffing responsibilities, fringe rates, and additional expenses.
- Request two page curriculum vitae from project participants.
- Finalize all partnership agreements and letters of cooperation with major partners.

**2 weeks from due date:**

- Finalize the grant narrative.
- Assemble materials created in-house for the grant application appendix.
- Secure and assemble letters of support and commitment.

**Submission week:**

- Using your checklist, ensure that all the grant pieces are completed and ready for submission.
- Save each file with the required file name as stated in the grant guidelines.
- Proofread all the pages of the application before submitting.



## 10. Letters of Support

When preparing a proposal, you will need stakeholders, collaborators, or other interested parties to write a strong letter of support for your project that will help your proposal stand out to the reviewers. Some funders want letters from all project participants.

It is important to respect people's time when asking them for a letter by showing that you've done your research and that you have some grant materials to share with them. Good letters demonstrate some knowledge of the project and recognition of its impact if funded.

Follow these steps when asking for a support letter and for specific types of assistance during the life of the grant, and you should receive a good letter in return.

- One month before grant deadline, begin brainstorming names of candidates to write letters of support. You will also want to note which collaborators are required by the grant application to submit letters of commitment and support.
- Start asking supporters at least **two weeks** in advance of grant deadline, because they will also have deadlines and other work competing for their work hours. You may find some folks are on leave at the time you inquire, be sure to have back-ups on your list.
- Email potential supporters, collaborators:
  - State why, specifically, you are asking Person A for support;
  - Be specific about what you are asking Person A to do over the scope of the grant, if anything, such as participate in 3 meetings, 2 phone calls over 18 months; or agree to review the project and provide feedback one month before official launch;
  - Provide any information about compensation, especially when asking someone to participate (ie, there will be a modest honorarium to recognize the time you give to this project of \$xxx);
  - Tell supporters what exactly you need to complete the grant application, in what format, and by what date (ie, a 2-page CV in PDF and letter of support on letterhead by next Friday).
- Attach materials that will be helpful for them when writing the letter
  - Provide a short project summary that includes the project goals, deliverables, and work plan from the grant proposal draft;
  - Include a starter letter containing sample text that references that person's or institution's role and why they are supporting the project.