

Grant Planning – Before You Write

Preparing a grant proposal for submission begins well in advance of any actual grant writing. Ideally, grant planning would begin *several months* prior to writing and submitting a grant. This document will provide an overview of the steps one should take prior to writing a grant in order to maximize the chances of receiving funding.

Start with an Idea

All grant projects should start with an idea that addresses a need. In higher education, this often involves enhancing the learning environment for students; from incorporating high-level research into course curriculum, to providing personal counseling, and everything in between. Institutions of higher education are often reactionary when it comes to grants. That is, they see a grant opportunity for which they are eligible to apply, and scramble to come up with a project that fits within the funding guidelines. This approach is backwards. It is highly recommended that grant seekers first develop an idea, then seek out an agency that will fund this kind of work. Not only does this better enable the grant seeker to develop a project that best addresses their needs, it also drastically improves the chances of receiving funding!

Research the Need

Even the most well thought-out, executable grant projects have no chance at funding if they are not addressing one or more important needs. Funding agencies want to make sure their money is going to be well spent, which includes ensuring it will have maximum impact. For example, would it matter how well a project was designed if its purpose was to improve college completion for a population that already has a 99% college graduation rate? Absolutely not. Even if the project was the most well-constructed grant reviewers had ever seen, it would not be funded because it would have very little impact on the target population.

For this reason, grant writers generally spend a significant amount of time researching the need for their projects. While first-person accounts and quotes can be very useful and should be included in a proposal, grant reviewers want hard data that supports the project. Depending on the project, sources of data may include institutional records, published research, and governmental databases. Additionally, data may be obtained directly from community-based organizations, private industry, schools, and a variety of other sources. In these cases, however, there is generally a substantial waiting period between the time of the request and when the data are actually provided. Further, there is no guarantee that these sources will be cooperative and provide assistance. The chances of success are greatly increased when 1) the purpose of your project aligns with the core mission and values of the organization or entity from which you are requesting data, and 2) when there are pre-existing connections or relationships with the organization or entity.

Complete Grant Development Chart

Now that you have an idea for a project that addresses a need, and numbers/research to back it up, it is time to complete the [Grant Development Chart](#). This chart will assist you in visualizing your idea and with linking project goals to other components of the proposal (objectives, activities, management plan,

evaluation plan, etc.). Remember, you will continue to refine and develop these components as you progress through the proposal, so you should not obsess over every detail (that comes later!).

Obtain Direct Supervisor Buy-In

Before going any further, it is important that you obtain buy-in for the project from your direct supervisor. The Grant Development Chart will be useful here as it provides a high-level summary of the project for your supervisor to review. Your supervisor may even want to take the idea further up the organizational hierarchy before providing much feedback. While this is a simple step, it is also vital. Continuing to develop your idea and writing the proposal will take an enormous amount of time. If there is an issue or roadblock to the plan, it is best to figure that out now before devoting more time and effort to the project.

Meet with Director of Grants to Identify Funding Agency and Complete Preliminary Approval Forms

The next step in the grant planning process is to meet with the Director of Grants to discuss your project. The Director of Grants can assist you in identifying a funding agency that will support the type of project you are proposing. Identifying a funding agency may only take a couple of minutes, or as long as several months, depending on your idea and the current funding climate. Resources for identifying funding sources can be found [here](#).

Once a funding agency has been identified, it is time to complete the Grant Concept and Preliminary Approval Forms. Assuming the steps above have been followed, these forms will take very little time to complete (generally less than 30 minutes). Both forms can be found on the [Grants Website](#). The Director of Grants can provide assistance in completing these forms, as well as with obtaining the appropriate signatures needed for approval.

Study the RFP/Solicitation

Almost without exception, grant opportunities will have specific guidelines and instructions for preparing proposals. Often referred to as a Request for Proposals (RFP) or Solicitation, this document will contain all of the information one needs to pursue a particular funding opportunity. The RFP/Solicitation should be reviewed very carefully prior to writing. When reviewing, pay close attention to the goals of the funding program (Do your goals align?), make sure you understand all the directions and evaluation criteria, and carefully review what costs are allowed or not allowed by the program. The Director of Grants can assist you with your review of this document and provide clarification when needed.

Communicate with Relevant Individuals and Obtain Institutional Support

Completing the approval forms in the previous step gives one permission to develop a full proposal. However, it is still important that individuals around the college that will be impacted by your project are made aware of and support your grant pursuits. For example, if your project will involve the purchasing, setup, and maintenance of computers and telephones, it is essential that discussions take place with leadership from Information Technology Services (ITS). College resources, including personnel, are very limited. In this example, you would need to obtain a commitment from ITS to perform these activities. If this is not possible, or if limitations are necessary, then changes to your

project plan must be made accordingly (e.g., remove the technology component, build in grant funding to purchase equipment or to pay for labor costs, etc.).

If the project you are proposing is well thought-out, addresses a clear need, and aligns with the strategic goals and initiatives of the college, then chances are good that support from relevant departments and individuals can be gained. The key is to establish and maintain open lines of communication. This allows the individuals impacted by your project to gain a better understanding of what you are trying to do, how you are trying to do it, and the support you need to achieve success.

Talk to the Program Officer

Each grant RFP/Solicitation will contain a list of one or more Program Officers who are familiar with the grant for which you are applying. It is highly recommended that you speak to these individuals prior to developing a full proposal. Ask what types of proposals get them excited, what types of proposals they have funded in the past, and where emphasis is being placed when evaluating the merit of new proposals. You should also describe the project you are proposing and why it is needed, and inquire as to whether this is the type of proposal they like to see. This is perhaps your best resource in gauging whether or not to continue your pursuit of this particular project with this funding agency.

Prior to contacting the Program Officer, be sure you are prepared; your idea must have some substance. Program Officers are typically happy to discuss a project, but they may become irritated if you have not given careful thought to your project, what you need to carry out the activities, and how and why the project will be successful. Simply put, if you cannot discuss in detail what your project will look like, you still have work to do before contacting the Program Officer.

Develop a Timeline and Start Writing

At this point you have started developing an idea for a project that addresses a clear need, and have obtained buy-in and approval from your supervisor and college leadership. You have also utilized the Grant Development Chart and approval forms to begin conceptualizing how your project will look, including its goals, objectives, and activities. Finally, you have identified a funding agency and a particular program to which you are going to apply, and you have developed a thorough understanding of the instructions and guidelines for the program.

The last step before you begin writing is to develop a timeline. Working with the Director of Grants, a comprehensive timeline should be developed. Deadlines for writing the various sections of the proposal should be established and time must be allotted to obtaining the final level of internal approval (a review of the budget and GC-1). Further, time must be devoted to the administrative aspects of submitting a grant, such as completing standardized forms and uploading proposal components.

Congratulations! You are now ready to start writing your winning grant!