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How to Tell Your SMART Story in Grant Applications

Presented by: Diane H. Leonard, GPC, RST

About Your Presenter

Diane H. Leonard, GPC, RST (She/Her)

▶ Grant Professional Certified (GPC)

▶ Approved Trainer, Grant Professionals Association

▶ Registered Scrum Trainer by Scrum Inc. ™ (RST)

▶ Began career as a grantmaker

▶ Over $122.5 million awarded for clients

▶ Owner, DH Leonard Consulting & Grant Writing Services, LLC

▶ Runner and coffee drinker

Housekeeping

Slides & Recording

Chatbox – You will see a member of our team sharing links throughout the session

Hydrate | Stretch | Break

Closed Caption

What We Will Cover

- How to Use the GPC Competencies

- How to Write SMART Objectives

- How to Enhance the Way You Tell Your Organization's Story

- How to Increase the Competitiveness of Your Proposals

- Next Steps

- Q&A

- Stay Connected

How to Use the GPC Competencies

A. GPC Competencies

B. "Knowledge of strategies for effective program and project design and development"

C. "Knowledge of how to craft, construct, and submit an effective grant application"

D. "Knowledge of nationally recognized standards of ethical practice by grant developers"

Welcome to GPCI

Providing a Standard of Excellence for the Grant Profession

The Grant Professionals Certification Institute (GPCI) administers the nationally recognized Grant Professional Certification (GPC) credential to grant professionals who meet eligibility requirements and successfully demonstrate proficiency in the required competencies. The GPC certification is based on rigorous standards and ongoing research to meet real-world demands of grant professionals. GPC-credentialed grant professionals demonstrate excellence in the grants profession and, on average, report higher earnings than those without the credential.
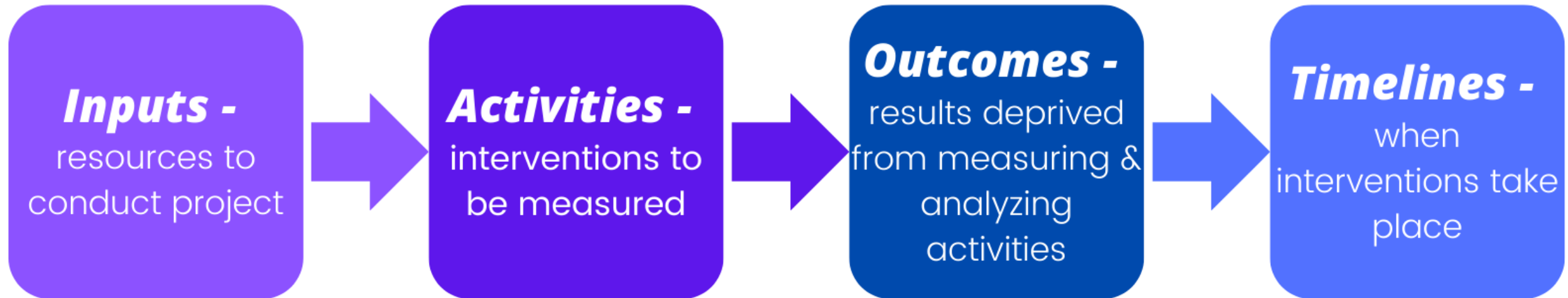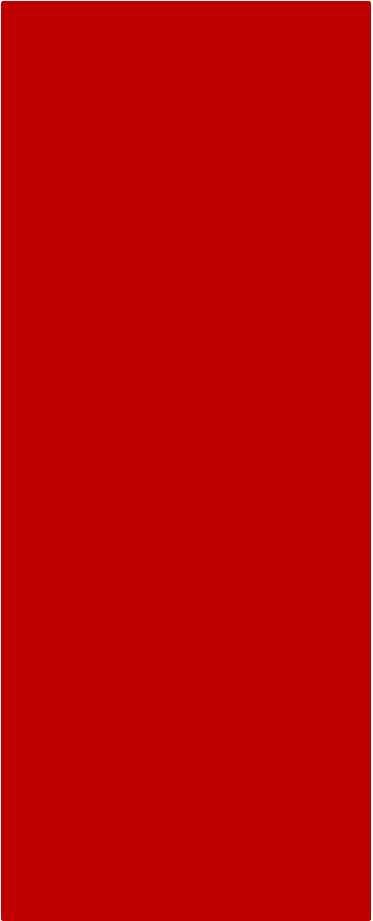
www.grantcredential.org

Knowledge of effective program design

Identify methods of building partnerships and facilitating collaborations among co-applicants

Identify structures, values, and applications of logic models as they relate to elements of project design

Inputs - resources to conduct project

→

Activities - interventions to be measured

→

Outcomes - results deprived from measuring & analyzing activities

→

Timelines - when interventions take place

Identify structures, values, and applications of logic models as they relate to elements of project design

A. Step 1: Pick an Internal Logic Model Template

B. Step 2: Develop Base Logic Models for Program(s)

C. Step 3: Customize to Each Grantmaker

Identify structures, values, and applications of logic models as they relate to elements of project design

Logic Model Template

| Resources	Activities	Outputs	Short-Term Outcomes	Intermediate Outcomes	Long-Term Outcomes	Impact

Identify appropriate definitions of and interrelationships among elements of project design
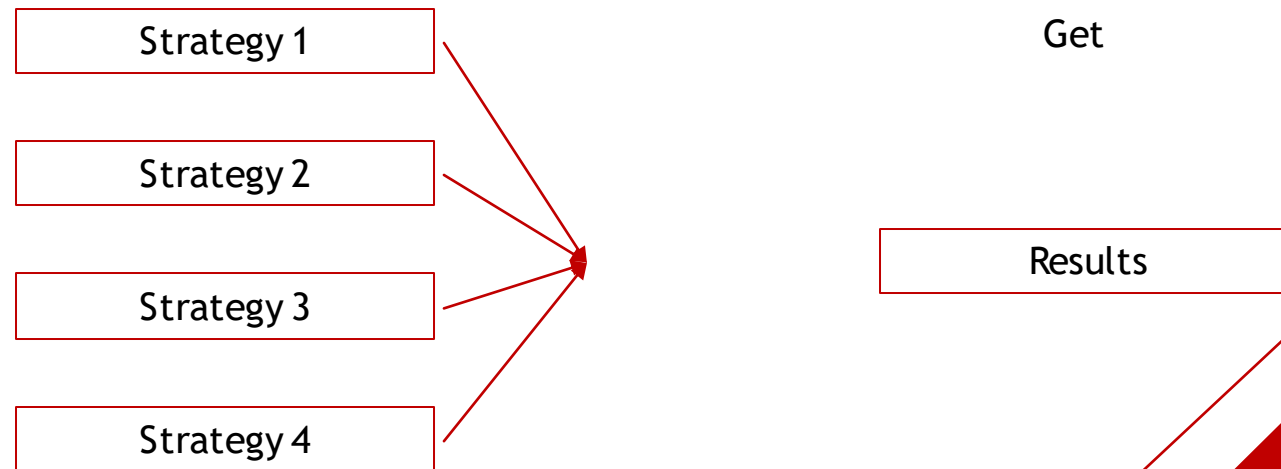
- Individual team members provide the dreams.

- The grant professional sees structure of reality.

- The grant team together defines the achievable for a competitive proposal.

Identify appropriate definitions of and interrelationships among elements of project design
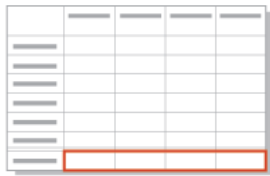
Do

Get

Basic Theory of Change

Strategy

Result(s)
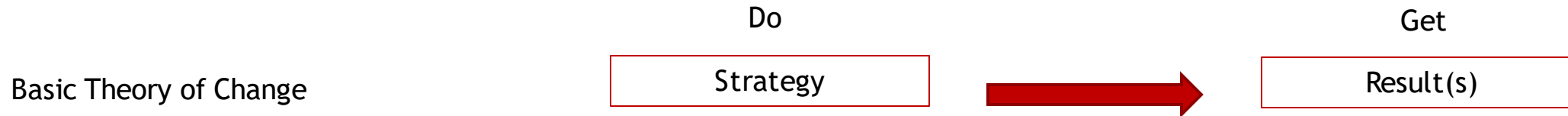
Multi-Strategy Basic Theory of Change

Get

Strategy 1

Strategy 2

Results

Strategy 3

Strategy 4

Identify existing community resources that aid in developing programs and projects

NEEDS ASSESSMENT PROCESS AND TOOLS

DATA ANALYSIS	INTERVIEWS & OBSERVATIONS	FOCUS GROUPS	PERSONAS	USE CASE
Analyzing data on usage, satisfaction, and trends to assess future needs	Guided conversations with users & first-hand observations of how they use spaces	Interactive sessions to gather input on needs and validate data from other tools	Creating portraits of representative users using motivations and behaviors	Stories of how a future space will be used -- who, where, why, and how
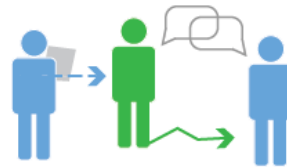
©brightspot strategy

Identify elements of a standard grant proposal application

A. Cover Letter
B. Executive Summary
C. Need Statement
D. Program Description
E. Evaluation
F. Organizational Capacity
G. Budget & Budget Justification
H. Attachments

Interpret grant application request for proposal (RFP) guidelines and requirements to ensure high quality responses

- Use *THEIR* terminology

  - If the funder calls those being served "consumers," adjust your own language in the proposal and call them consumers.

  - EVEN if you normally call them clients, or participants in all of your internal and public materials.

Identify and cite accurate and appropriate data sources to support proposal narratives
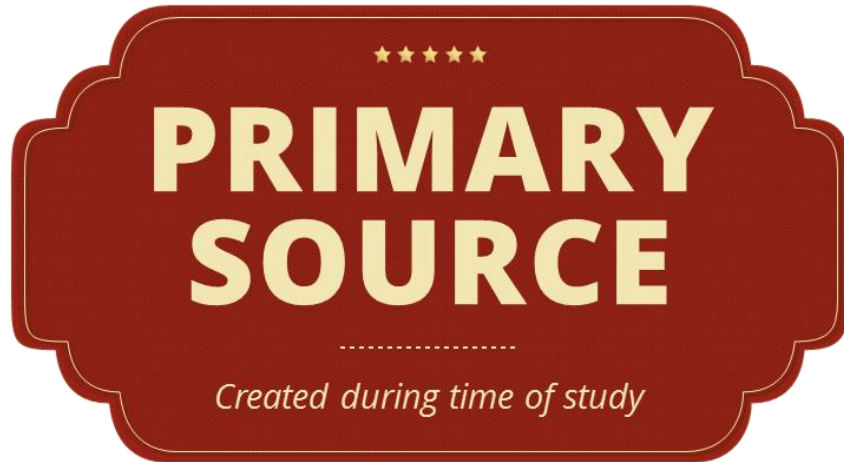
★★★★★

PRIMARY SOURCE

Created during time of study

SECONDARY SOURCE

Created after the fact

Identify and cite accurate and appropriate data sources to support proposal narratives

Real Example:

The City of Winston-Salem is located in the north central portion of North Carolina. With a population of 241,218 (2015 American Community Survey, US Census) found within the city's 132.4 square miles, Winston-Salem is the state's fourth largest city. The community is home five (5) institutions of higher education with a student population over 29,000 including: Wake Forest University (enrollment of 7,669), Winston-Salem State University (enrollment of 6,442), Forsyth Technical College (enrollment of 12,698), Salem College (enrollment of 865), and North Carolina School for the Arts (enrollment of 1,144). Venues such as the Lawrence Joel Veterans Memorial Coliseum Complex, Dixie Classic Fairgrounds, Benton Convention Center, BB&T Ballpark, and Bowman Gray Stadium support large public gatherings. The largest of the venues, the Dixie Classic Fairgrounds has over 300,000 visitors within a ten-day period annually.

Identify and cite accurate and appropriate data sources to support proposal narratives

Real Example:

What Did We Like?

- Narrative citation of statistics
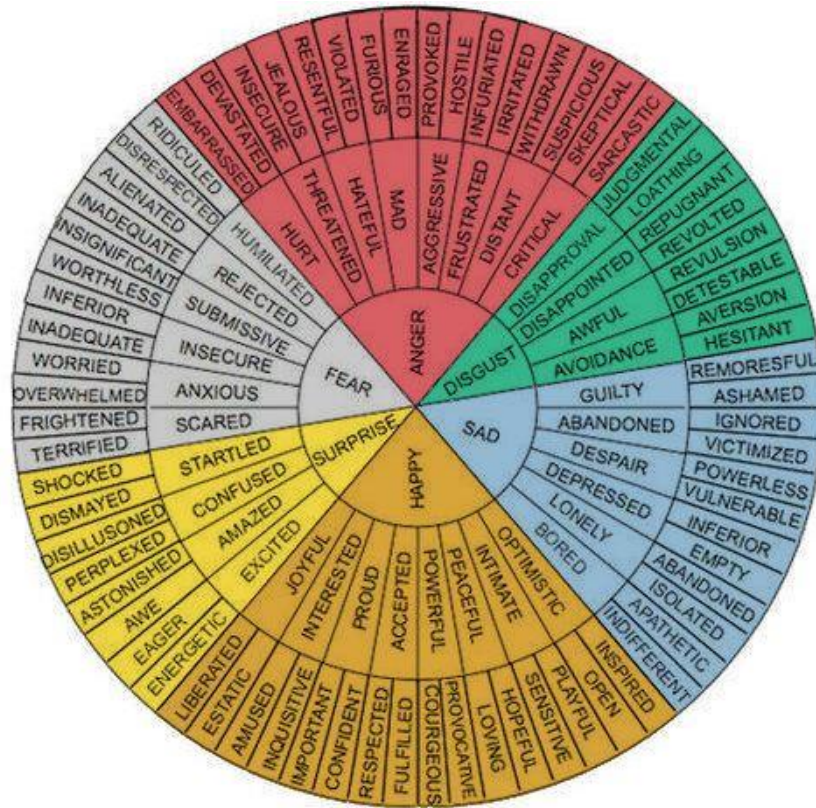 - (2015 American Community Survey, US Census)

What Could Be Better?

- Bulleted list of universities and census OR a small chart

Identify appropriate, sequential, consistent, and logical presentations of grant-narrative elements and ideas among or within proposal components
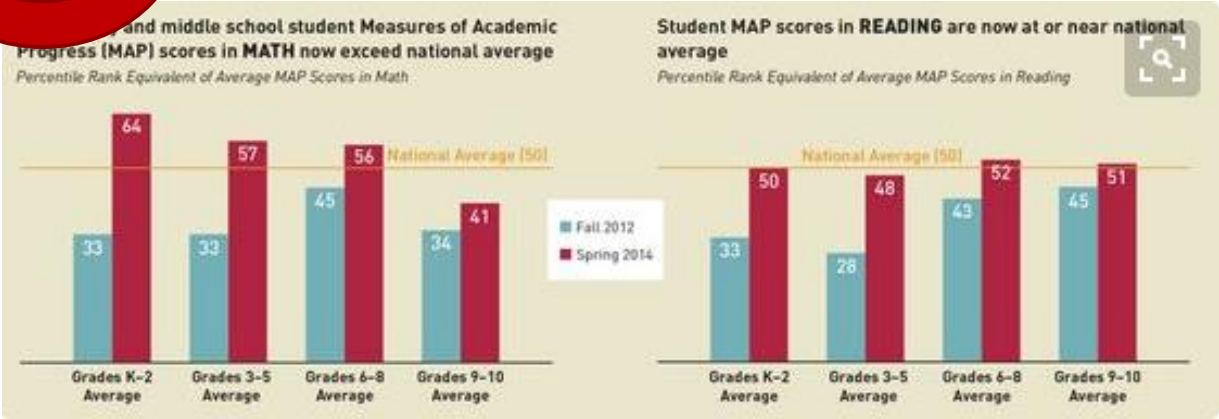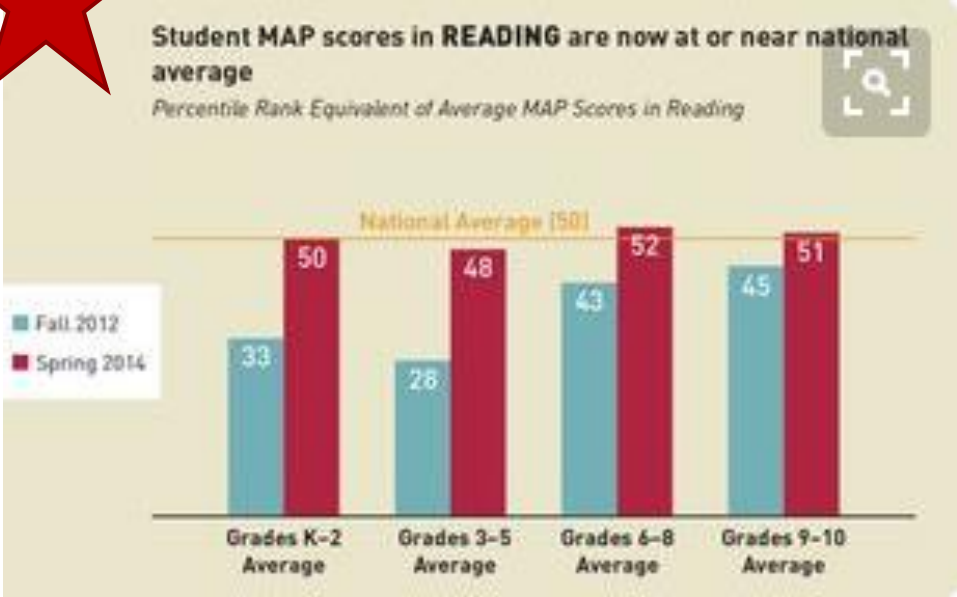
Problem + Action = Solution

Identify proposal-writing approaches, styles, tones, and formats appropriate for proposing organizations and various audiences

Identify appropriate and accurate uses of visuals to highlight information

Identify effective practices for developing realistic, accurate line-item and narrative budgets and for expressing the relationship between line-items and project activities in the budget narrative

There are three components to the travel expenses for successfully implementing the project:

1 - Mileage to within the four counties participating in the project. Mileage is billed at the IRS standard rate of $.56/mile.

Total: $8,812.80

Year 1: $1,762.56, *Year 2:* $1,762.56, *Year 3:* $1,762.56, *Year 4:* $1,762.56, *Year 5:* $1,762.56,

2 - Overnight hotel stays within the four counties when appropriate. Lodging is to be billed at the GSA rate for the four counties in Minnesota at $89/night.

Total: $12,015.00

Year 1: $2,403.00 *Year 2:* $2,403.00 *Year 3:* $2,403.00 *Year 4:* $2,403.00 *Year 5:* $2,403.00

Identify characteristics of business relationships that result in conflicts of interest or give the appearance of conflicts of interest

How to Write SMART Objectives

A. Definitions

B. Finding the SMART Elements

C. Practicing Writing in SMART Style

Goals and Objectives

- A goal is an overarching principle that guides decision making.

Goals are:

- Broad
- General Intentions
- Intangible
- Abstract

Goals and Objectives

- Objectives are specific, measurable steps that can be taking toward a goal

Objectives are:
- Narrow
- Precise
- Tangible
- Concrete

Outputs and Outcomes

- *Outputs* are what will be produced or created through the activities, typically quantifiable.

- *Outcomes* are the anticipated changes such as in awareness, knowledge, skill, and behavior.

*Specific

- "Who" and "What" of program activities.
- Use only one action verb, because objectives with more than one verb imply that more than one activity or behavior is being measured.
- Avoid verbs that may have vague meanings to describe intended outcomes

*Adapted from CDC's SMART Goals

SMART — Specific, Measurable, Attainable, Relevant, Timely

Measurable

- Objectives should quantify the amount of change expected
- Make sure whatever change you propose can be measured
- Consider who the objective addresses equitable evaluation

Achievable (Attainable)

- Objectives should be attainable within a given time frame and with available program resources.
- Objectives should clearly define who will benefit from these changes.

Realistic (Relevant)

- Objectives are most useful when they accurately address the scope of the problem and programmatic steps that can be implemented within a specific time frame.
- Objectives that do not directly relate to the program goal will not help achieve the goal.

Time-bound (Timely)

- Objectives should provide a time frame indicating when the objective will be measured, or a time by which the objective will be met.
- Including a time frame in the objectives helps in planning and evaluating the program.
- Objectives should address sustainability

Goals and Objectives

Old style: I will vanquish evil in a single afternoon!

Goals and Objectives

SMART style: I will increase the distance from the ground by 1 meter before dinner tonight.

Definitions

Goal: A broad statement of program purpose that describes the expected long-term effects of a program.

Strategies: The means or broad approach by which a program will achieve its goals.

Objectives: Statements that describe program results to be achieved and how they will be achieved.

Writing SMART Objectives

To use an objective to monitor your progress, you need to write it as a SMART objective. A SMART objective is:

1. Specific
Objectives should provide the "who" and "what" of program activities.

The greater the specificity, the greater the measurability.

2. Measurable
Objectives should quantify the amount of change expected. It is impossible to determine whether objectives have been met unless they can be measured.

3. Achievable
Objectives should be attainable within a given time frame and with available program resources.
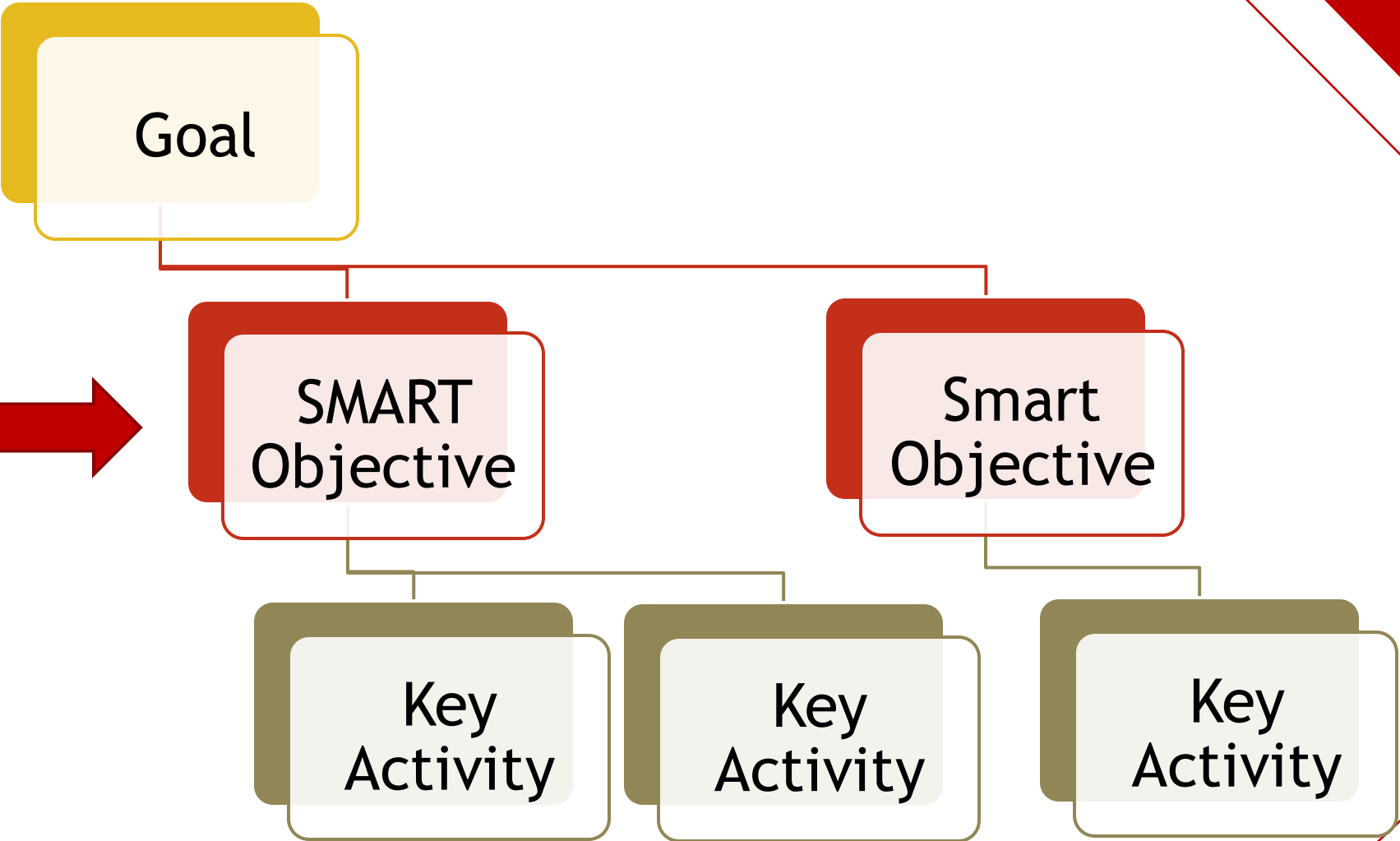
4. Realistic
Objectives are most useful when they accurately address the scope of the problem and programmatic steps that can be implemented within a specific time frame.

5. Time-phased
Objectives should provide a time frame indicating when the objective will be measured, or a time by which the objective will be met.

Example:

By the end of the school year, district health educators will have delivered lessons on assertive communication skills to 90% of youth participants in the middle school HIV-prevention curriculum.

By the end of the school year, **district health educators** will have delivered lessons on assertive communication skills to 90% of **youth participants** in the middle school HIV-prevention curriculum.

Specific

By the end of the school year, district health educators will have delivered lessons on assertive communication skills to **90%** of youth participants in the middle school HIV-prevention curriculum.

Measurable

By the end of the school year, **district health educators** will have delivered lessons on assertive communication skills to 90% of **youth participants in the middle school HIV-prevention curriculum**.

Achievable

By the end of the school year, **district health educators** will have **delivered lessons** on assertive communication skills to **90% of youth participants** in the middle school HIV-prevention curriculum.

Realistic

By the end of the school year, district health educators will have delivered lessons on assertive communication skills to 90% of youth participants in the middle school HIV-prevention curriculum.

Time-bound

Program Goal:

To increase family caregivers' understanding of how to manage difficult behaviors in those with Alzheimer's disease so they can remain in their home environment instead of long-term care.

A **non-SMART** Objective:

90% of family caregivers of those with Alzheimer's disease will participate in our education workshops.

What is missing?

- A: Attainable

- R: Relevant

- T: Time-bound

....and the S and M are weak.

A **SMARTer** Objective:

By the end of the calendar year, 90% of family caregivers utilizing the Alzheimer's Association Adult Day Program will have participated in the Family Caregiver education series, and will self-report an increased understanding of how to handle difficult behaviors from those with dementia in their home environment.

A **non-SMART** Objective:

Teachers will be trained on the selected scientifically based health education curriculum.

What is missing?

- S: Specific

- M: Measurable

- T: Time-bound

A **SMARTer** Objective:

By year two of the project, LEA staff will have trained 75% of health education teachers in the school district on the selected scientifically based health education curriculum.

Draft YOUR Objective(s)

1. _____

_____

_____

_____

2. _____

_____

_____

_____

3. _____

_____

_____

_____

Objectives Checklist

Now that you have written out your SMART objective(s), ask yourself, is the objective SMART? Go back to your draft objective(s) and circle then label each of the five SMART elements in your draft objective(s).

Specific: Who? (the target population and people doing the activity) and what? (the action or activity).

Measurable: How much change is expected.

Achievable: Can be accomplished given current resources and constraints.

Realistic: Addresses the scope of the health program and proposes reasonable programmatic steps.

Time-phased: Provides a timeline indicating when the objective will be met
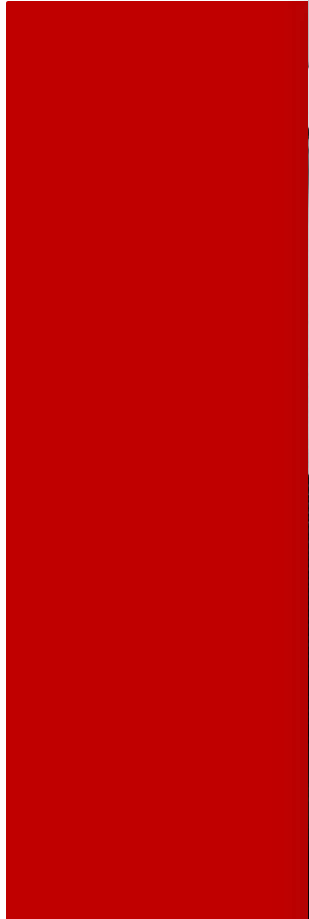
How to Enhance the Way You Tell Your Organization's Story

Step 1: Collect Stories

Step 2: Determine Which Story for Which Grantmaker

Step 3: Place Your Story in Your Application

Step 1: Collect Stories

Client Stories

Stories shared directly with you by those you serve

Step 1: Collect Stories

Staff Stories

Stories shared indirectly about those you serve

Step 1: Collect Stories

Donor/Grantmaker Stories

Stories about why someone supports your organization

Step 1: Collect Stories

Community Stories

Stories from stakeholders in the community about the impact your organization has.

Step 2. Determine Which Story for Which Grantmaker

Does the grantmaker utilize stories about grantee clients on their website or social media?

Use a client story or a staff story

Step 2. Determine Which Story for Which Grantmaker

Does the grantmaker participate in numerous community collaborative groups or communities?

Use a community story

Step 2. Determine Which Story for Which Grantmaker

Does the grantmaker often partner with other grantmakers on funding efforts?

Use a donor/grantmaker story

Step 3: Place Your Story in Your Application

Need Statement

- Share what a day in the life of a client is like

- Create a persona to share what barriers clients face

Step 3: Place Your Story in Your Application

Program Description

- Tie a client story from the need statement to highlight how program design addresses a barrier

- Use a staff story to highlight why a program design feature was added to address a need or barrier

Step 3: Place Your Story in Your Application

Organization Capacity

- Use a donor story to show other's support and believe in the strength of the organization

- Use a community story to show the support and engagement of other stakeholders in the proposed project or program

How to Increase the Competitiveness of Your Foundation Proposals

Step 1: Double Check Your Best Practices

Step 2: Don't Throw Spaghetti at the Wall
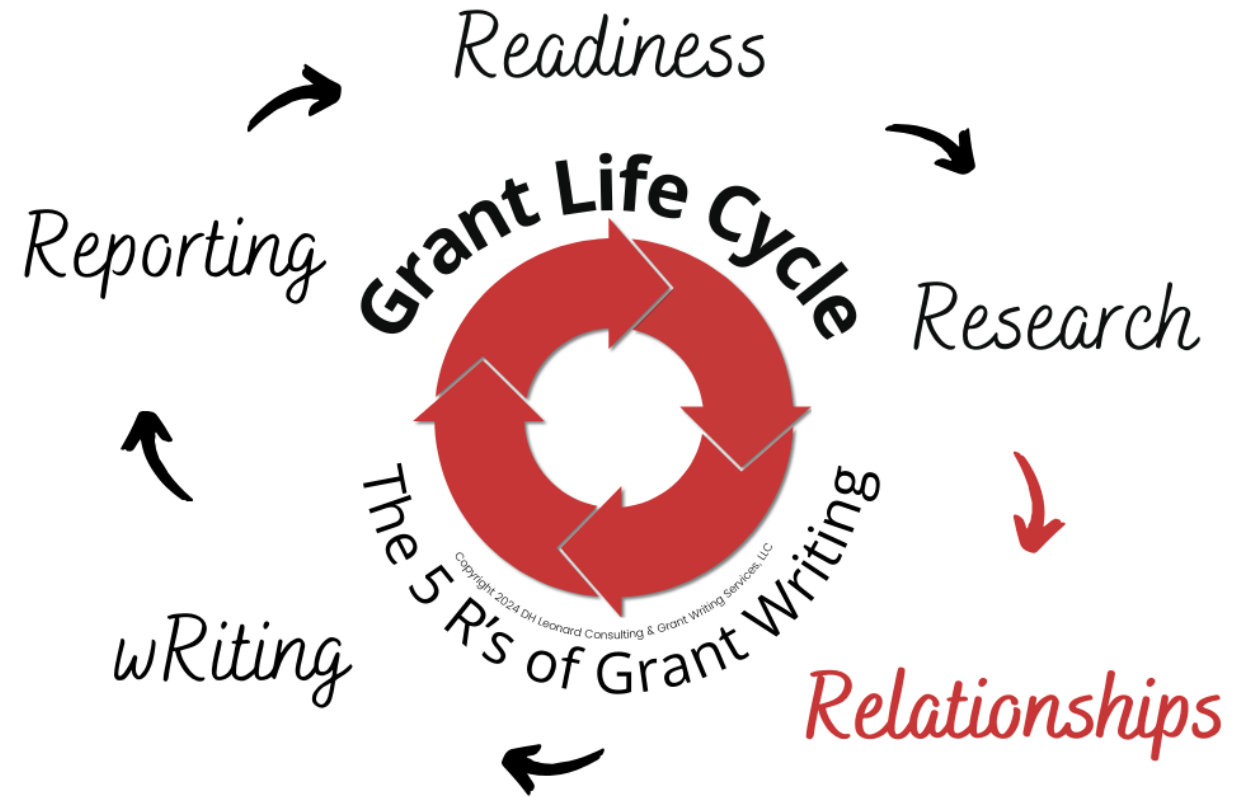
Step 3: Test Out Your Story On Others

Step 1: Double Check Your Best Practices

1. Readiness
2. Research
3. Relationships
4. wRiting
5. Reporting

Step 1: Double Check Your Best Practices

Relationship outreach and maintenance efforts are usually the most commonly overlooked.

Step 2: Don't Throw Spaghetti at the Wall

Take your time!
Stick to the best practices and don't send proposals out where you have shortcut any steps in the process or are "hoping" anything about your grantmaker's interpretation.

Step 3: Test Out Your Story on Others

Test out your different stories on your colleagues, on your family, and on your friends. What resonates universally with the largest number of people?

Use that as your story when in doubt.

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Q&A

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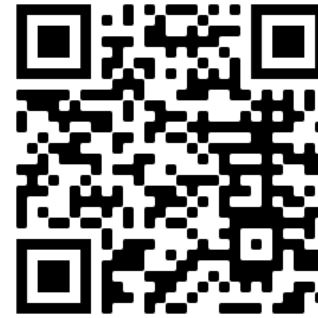
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