

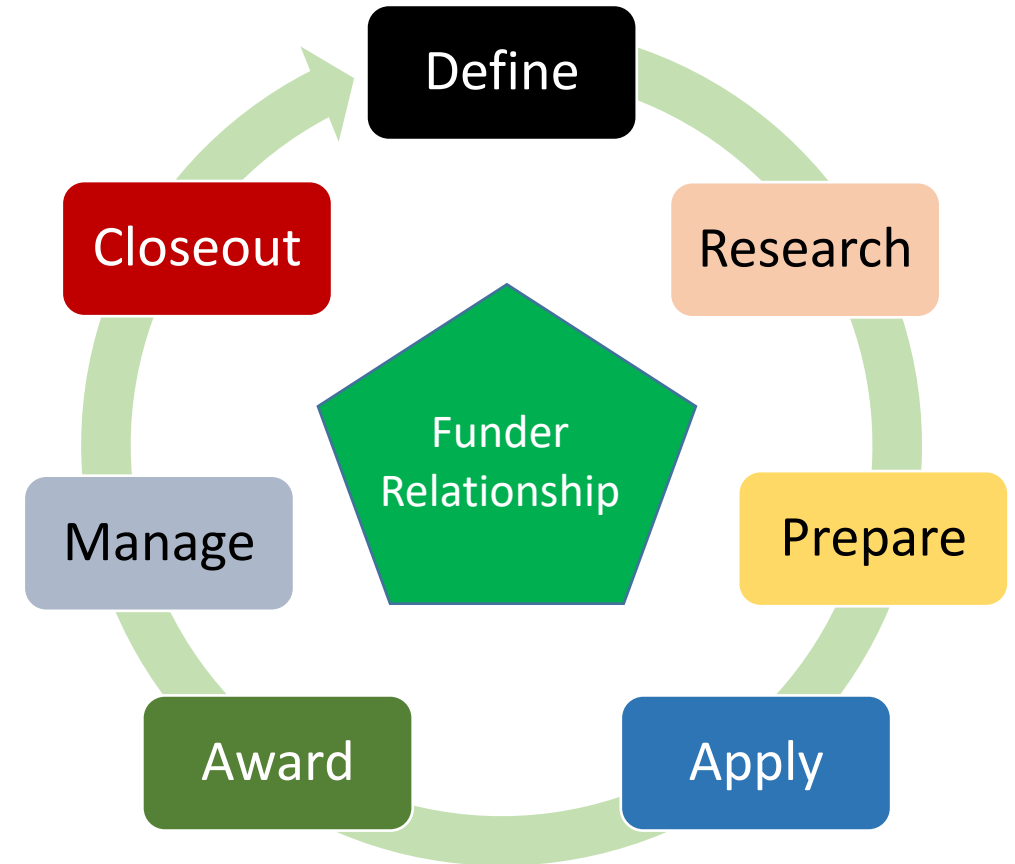
Everything You Need To Know to Creating Successful Grant Applications

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Today's Presentation

- General Information
- Your Grant Story
 - Creating and Using a Grants Team
 - Identify your project or request scope and solution
- Grant Search
 - Types
 - Funder Assessment
 - Using a Grant Writer
- Grant Application – Use Plain Language
- Project Administration & Implementation
- Resources



Tell Us About Yourself

- Public Works Director/Superintendent
- Clerk or Treasurer
- Administrator/Manager
- Elected Official
- Other Local Government Staff



Why Are You Here?

- Between LRIP and other grant programs, this is an area that I need to know.
- I have an infrastructure project or program that needs funding
- We are starting to explore obtaining grants
- I know a lot about grants, but I can always learn more
- I like going to WTA presentations
- What, I just ducked in hoping to find a quiet place to take a nap.

What Is Your Grant Application Experience?

- No Experience
- 1-3 grant applications
- 4-10 grant applications
- More than 10 grant applications



WisDOT - Tips for Successful Applications

- **Actions to take before the application process:**
 1. Decide on the parameters of your project & clearly define project need & scope
 2. Conduct stakeholder outreach & engage interest in your community & obtain letters of support
- **Actions to take during the application process:**
 1. Complete all sections of the application materials – Include a Map/location of the project area and site photos
 2. Review application materials for errors
 3. Tell a story – Engage the reviewer
 4. Submit materials by (or before) the application deadline
- **Actions to take after the application is submitted:**
 1. Be Proactive - confirm receipt of application materials& inform WisDOT of any changes
 2. Be Patient - ask when project awards are likely to be announced & do not start work on your project prior to authorization
 3. Be Persistent - Not all applicants are successful the first time & use what you learn to improve your application for future submissions

Step #1 - Should you apply?

- **Maybe No:**

- Can you do excellent work with very little money
- Money becomes a drawback
- Other better suited solutions
- Your project does not match grant guidelines
- Timing is not right

- **Maybe Yes:**

- At the start of a new project or expansion an existing one
- You have time and energy
- Strong potential for community backing and support
- Timing is right!



Step #2 – Consider a Grant Team

• Why a Grant Team?

- Inclusive to address all requirements to make the project grounded in community needs.
- Ask community volunteers and other organizations (regional, County, other Local Governments, Chamber of Commerce, other community groups, etc.) to help and serve.
- Keep in place and working throughout the project/grant to completion.
- Be creative in addressing your need to the Funder's interests.
- A team member's special skills/knowledge can tie your project to Funder's interests.



Step #3 – Do you Understand the Work Required?

1. Is your Grants Team on the same page regarding your project?
2. Are you willing to do significant Funder research for opportunities to tailor your plan/project?
3. Does Your Project/Mission align with those of the grant-giving bodies?
4. Fully engage your Grants Team
5. Are your operations sustainable?
6. Is your concept, project, and plans workable?
7. Will you be able to meet all grant requirements?



Step #4 – How Much Funding is Needed

- Funding

- What do you really need?
- Required Matching funds – Cash or in-kind.
- Typical grant range?
- Funded similar organizations?
- What is the Funder's geography?
- Are there other partners?
- Long-term sustainability



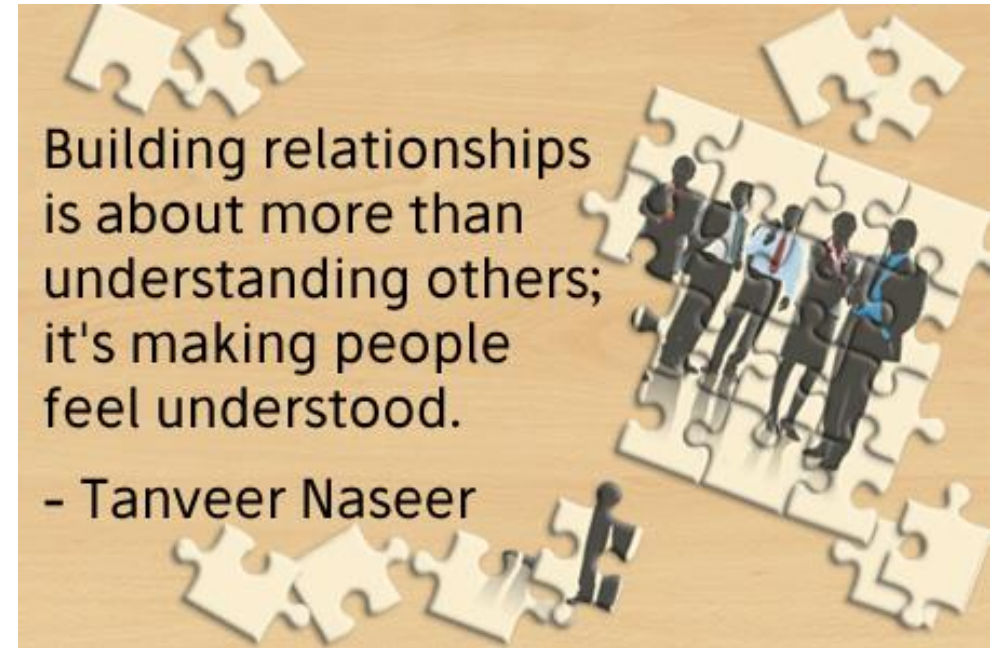
Step #5 - Research, Research & Research

- Do Your Homework – Use Grant Team Members
 - Learn everything about the Funder -
 - Check other Funding Databases – (see references)
 - Grant requirements – early submission for early decision
- Funder Relationship - Create a Win-Win relationship
 - Talk to Funder about the match between your needs and their interests
- Timing
 - 6 - 12 month minimum & for some grants could be a 2+ year effort
 - Timing - RFP or Open grants



Step #6 - Create a funder relationship

- Let your supporters facilitate an introduction
 - ✓ Local Government Officials
 - ✓ Board members
 - ✓ Major donors
 - ✓ Key volunteers
 - ✓ Staff members
- Build the Funder relationship yourself
 - ✓ Try to make a telephone call or an email to make a phone appointment
 - ✓ Know who you're talking to and why
 - ✓ Keep the conversation brief and to the point



Step #7 – Match your need with Grantor Interests

- Start With a Clear Concept and Goal
- Use Research and Discussions to Focus on Funder's Interests
- Does Your Mission/Need align With Funder's Interests
- Create Your Story
- Consider Partnerships & Synergies

7 STEPS TO IMPROVING YOUR STORYTELLING

Storytelling is one of the most innate human activities, but it takes work to hone your craft. Follow these 7 steps shape your stories:

by Andrew Linderman

- 1 KEEP A DAILY LOG**

Record events as they happen. Set aside at least half an hour each day to write in a journal. Stick to the facts as much as possible. Be specific (paint a picture), honest (don't lie!), and personal (explore your stakes), and you'll quickly find that the journal will become a source of material for stories.


- 2 SHARPEN LISTENING SKILLS**

Listen to the stories that your friends and family tell. Try to identify the component parts (character, setting, problem, stakes, conflict tension, crisis, climax, consequences) of every story.


- 3 RECORD & TRANSCRIBE**

Record yourself telling a story and, an hour later, transcribe the tape verbatim. This will help you ID verbal tics and offer insight into the strengths and weaknesses of the narrative. Ask yourself: Does the story interest me? If I were a stranger, would I listen to the whole story?


- 4 OUTLINE THE STORY**

Once you've recorded and transcribed your story, outline it. Break the story into scenes, draw pictures, or use a story map. Experiment with different outline techniques and you'll find one that works best for you.


- 5 TURN IT INTO A PITCH**

You should be able to summarize your story in a one sentence pitch, so practice doing this with every story you tell. Pitches should be simple and should suggest big moments or events (i.e. "the time I almost failed out of college"). The simpler the pitch (10 words or fewer) the better.


- 6 TRY IT OUT IN A SOCIAL SETTING**

Pitch your story to friends in a social setting and see if anyone wants to hear the story. You'll quickly figure out what your audience finds interesting. Once you're feeling comfortable with the story, try performing it at an open mic.


- 7 IDENTIFY A THEME**

A theme (i.e. redemption, love, betrayal, etc) will often appear in a story after you've told it a few times. Once you become aware of the theme, edit the story so the scenes work in service of the theme or themes. You'll be amazed at what happens when you take the time to edit properly.


- 8 ADD A NEW TWIST**

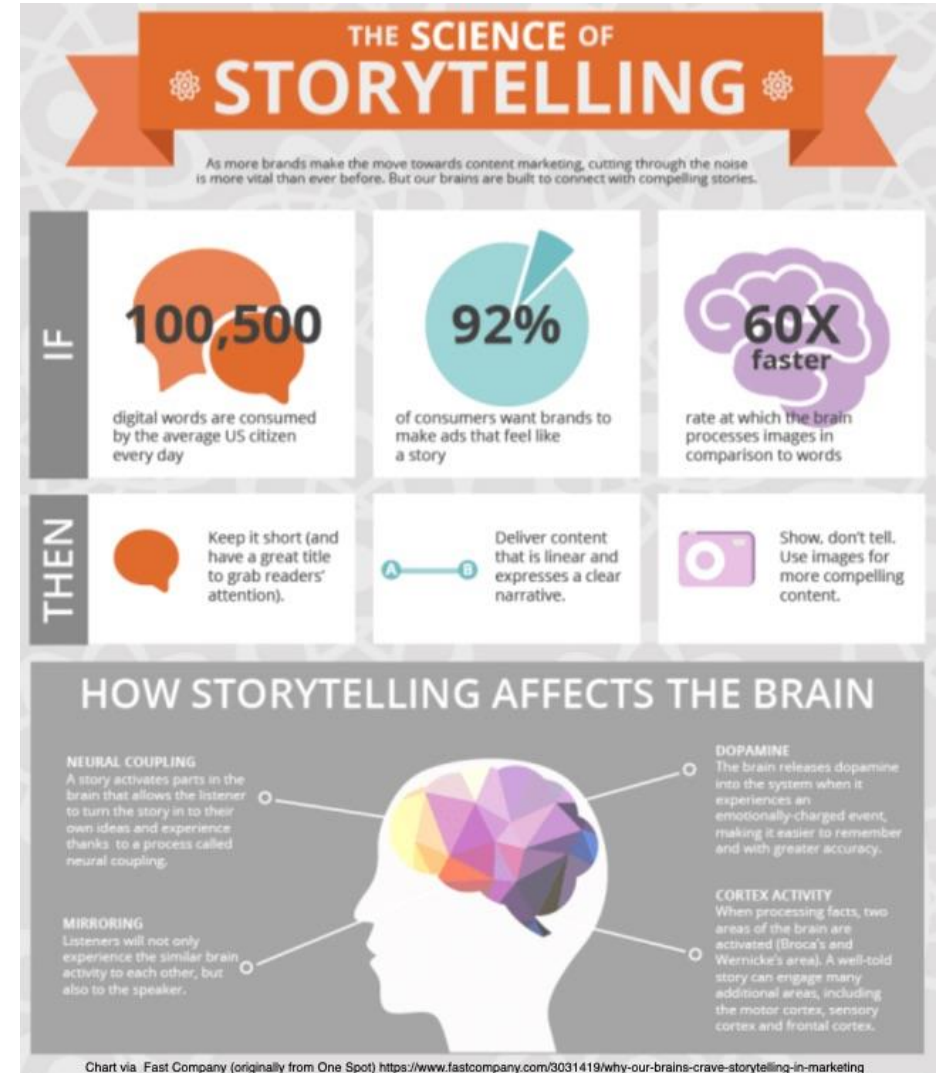
After you've performed a story several times, add a new twist. Start in a different place or add in a new detail and see how your audience reacts. The change may or may not work for the story, but you'll learn something in the process. And that's the point, after all.



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Great Story Telling Essentials

1. Do you have a clear project concept and goal?
2. A successful grant begins with the need.
3. How does the proposed project address the need?
4. Begin with the end in mind – Start with the project benefits to explain why the project is needed
5. What are the project story's key takeaway(s)?
6. Why should the grantor care? Establish how the project's long-term and short-term benefits tie to the grantor's interests.

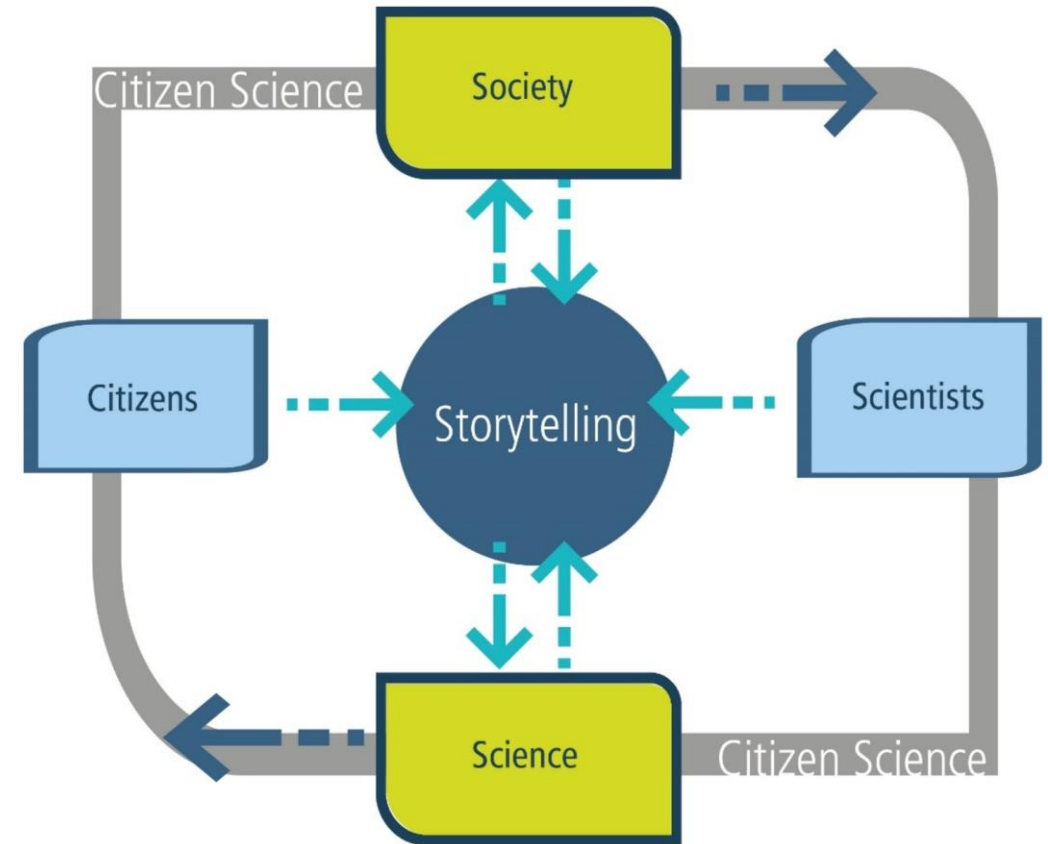


Great Story Telling Essentials

6. Use facts and data to establish credibility
7. Make the story personal, explain the impacts on real people.
8. The entire proposal must support the project story.
9. Avoid jargon, such as planning and engineer speak.

How to tell a story effectively for a powerful grant proposal,
<https://grantfundingexpert.org/how-to-tell-a-story-effectively-for-a-powerful-grant-proposal/>

Tips for telling your nonprofits story in your grant proposal,
<https://www.rbwstrategy.com/tips-for-telling-and-selling-your-nonprofits-story-in-your-grant-proposal/>



Step #8 – Address the Grant Proposal Components

- Cover letter, title page, and abstract
- Statement of the Problem / Needs Statement (Your Story!)
- Project Description (goals/objectives, methods/activities, and sustainability)
- Evaluation Plan
- Budget Request and Budget Justification
- Applicant Qualifications
- Future Funding Plans
- Appendices



Grant Writer Tips

- Who is your audience?
- Why Should the Funder Care? –
 - Tips to help you align your story with the funder's interests
- Do you have a logical, clear, actionable p that will provide positive results
 - KISS
 - Always ask “So What?”



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Grant Writer Tips

- What are your project goals, are they clear and measurable?
- What are the expected outcomes, who gets helped?
- Who is involved, build partnerships and community support?
- What is your story, it is ok to get personal in telling your story
- Write your grant application clearly and boldly

Research Paper Writing



Step #9 – Preparing a *Winning* Grant Proposal

- You are your proposal - Do what you set out to do
- Issue Statement - must address the Funder's priorities
- Show you're ready
 - Clear Need & Goal
 - Organizational structure
 - Projected budgets
 - Sound evaluation plan
- Learn from rejection



Why do Grants Fail?

- **Submission Errors**
 - Missing the deadline
 - Ineligible entity
 - Exceeds page limit
 - Missing documents
 - Inclusion of ineligible expenses in the budget
- **Writing Errors**
 - Misspelling, incomplete sentences
 - Failure to show the failure of the status quo
 - No plan for evaluation and measurement
 - No plan for long-term sustainability
 - Weak objectives



Public Facilities (CDBG-PF) Program



- Grant to local government (towns, villages, and non-urban cities and counties).
- Maximum Award = up to \$1,000,000.
- 50% Match required.
- 24 months to complete project.
- Must meet a National Objective (LMI Benefit, Slum/Blight Removal or Urgent Local Need).
- Eligible funded activities :
 - Streets,
 - Drainage Systems,
 - Water and Sewer Systems,
 - Community Buildings (Fire Station, Senior Center, Community Center, Library)
- Annual Competition (Applications due May 2023).

Village of Lake Delton Senior Center
Public Facilities Project



Village of Camp Douglas Main Street
Public Facilities Project



Village of New Auburn Fire Station
Public Facilities Project



Private Foundation Types

- Family
- Independent
- Community
- Corporate

got philanthropy?

What are the Funder Motivations

- **Public Entities**

- Primarily want to fulfill Legislative goals and interests through an objective process

- **Private Foundations**

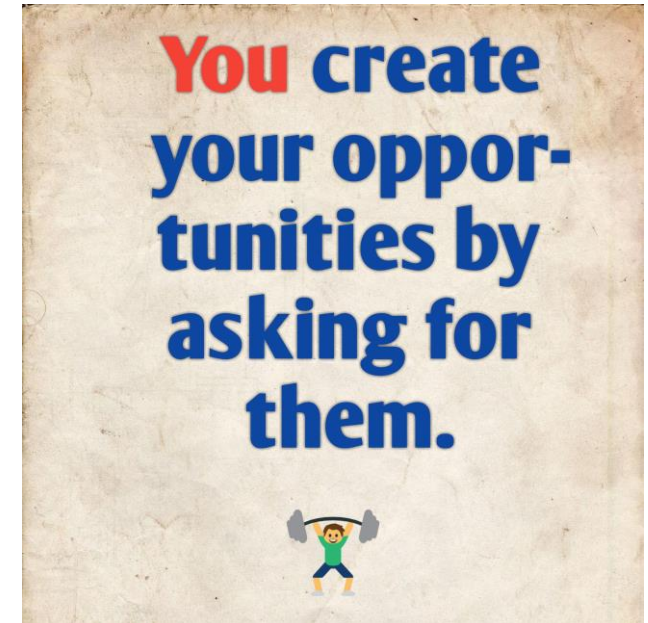
- Primarily want to fulfill philanthropic goals and interests while supporting a variety of issues through an objective process

- **Corporate Giving**

- Tend to focus more on branding, visibility and Corporate Social Responsibility (CSR)

- **Grantmaking Public Charities/Foundations**

- Typically want to make an impact in designated communities or regions, or focus on specific population groups or issue areas



Local Funding Sources

- Who in your area shares your vision and priorities?
- Are there local businesses that would be willing to fund or contribute to your project? Or a portion of it?
- What local non-profits and community groups exist that could provide funding (or in-kind donations)
- Are there individuals who would be willing to make a contribution?

Corporate Giving Programs

- Typically, a minimal application process
- A corporate giving program is a grantmaking program established and administered within a profit-making company.
- Gifts or grants go directly to charitable organizations from the corporation.
- Corporate giving expense is planned as part of the company's annual budgeting process
- Usually is funded with pre-tax income.

Wisconsin Corporate Giving -Snapshot:

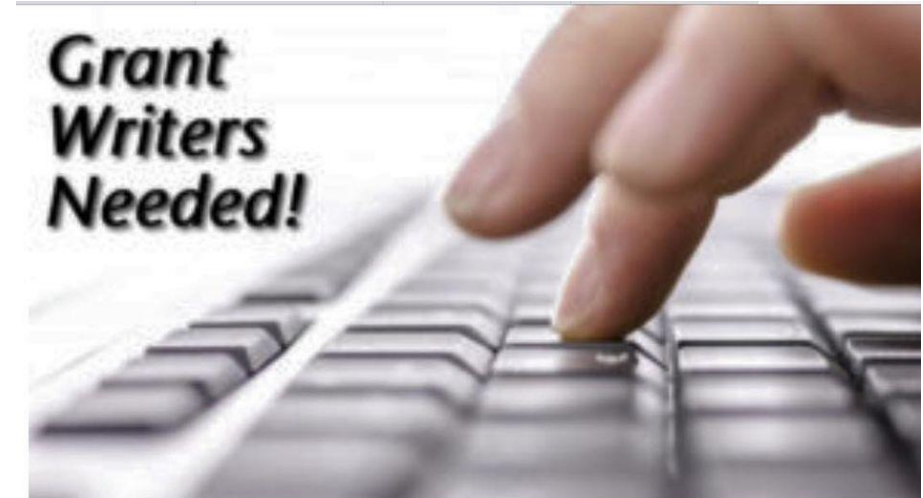
- Cardinal Capital Management,
- Foley & Lardner, LLP,
- Great Lakes Higher Education Guaranty Corporation,
- Johnson Bank Wealth Management,
- Kohl's Corporation,
- Marking Services,
- MillerCoors,
- National Guardian Life Insurance Co.,
- National Investment Services,
- Potawatomi Hotel & Casino,
- Quarles & Brady LLP,
- Rockwell Automation,
- TASC,
- The Northern Trust Company,
- UW Health,
- Whyte Hirschboeck Dudek S.C.,
- WPS Health Solutions

Funder Assessment

- Thoroughly read the instructions with the grant application to understand what the funder will allow
- Research the funder, what other types of projects have they funded?
- Reach out to the funder with any questions, or to “pitch” an idea if you are unsure
- Identify local match requirements

Considerations for hiring a grant writer

- What will you need the grant writer to do?
- Finding grant writers and understand their experience and expertise
- Understanding the process and approach
- Cost and contract considerations
 - Consider a joint grant writer with other nearby jurisdictions
 - Waupaca School District, Chamber of Commerce and City of Waupaca



Grant Administration

- Decision to administer the grant internally or hire a third-party grant administrator? Consider this.....
 - Cost?
 - Staff Time Commitment?
 - Complexity of Administrative Requirements?
- Grant requirements can be complex and require unique experience and knowledge such as.....
 - Financial Management
 - Wage Rate Monitoring
 - Environmental Review
 - Uniform Relocation Act

Grant administration

- Procurement
- Reporting
- Audit
- Closeout

Understanding Grant Requirements

- What did we propose to accomplish?
- How will we demonstrate successful completion of the project?
- What does the funding agency require?
- Read enacting legislation and regulations.
- Read your Grant Agreement!!
- Q&A with Assigned Program Representative(s)

Implementation Requirements

- **Duties & Responsibilities**
 - Commitments (Application & Award Letter)
 - Record Keeping & File Management
 - Grant Agreement compliance
 - Monitoring (including Reporting)
- **Paperwork & File Organization**
- **Resources: Utilize the Tools Provided**
 - Project File Checklist
 - Self-Monitoring Checklist

Understand Your Responsibilities

- As a grantee, you accept full responsibility to manage the grant.
- Third-party administrators **are NOT** directly responsible (to the funding agency) for grant compliance; they are not the grantee with whom a funding agency has a grant agreement.
- Understand the key provisions within a grant agreement:
 - Scope of Work
 - Budget – grant vs. match
 - Reporting
 - Timeline
- Typically, “boilerplate” language within a grant agreement is non-negotiable, focusing on scope, budget, and timeline.
- Use your Assigned Program Representative as a resource!

Reporting Requirements

- How often are we required to file reports?
- Use reporting forms provided by the funding agency when available.
- Do reports require municipal approval and official signatures?
- Build in time before the deadline to obtain approval and signature.
- Provide details of progress, and identify issues!
- Details within reports help you to obtain amendments.

Closeout Requirements

- Project complete.
- Final invoices/costs are incurred and paid, conform to grant agreement budget.
- Certify project was completed as proposed in grant agreement.
- Document who benefitted from the project, do beneficiaries match those identified in the application and do they meet programmatic requirements. Ex. Low to moderate income, homeless persons, job training, job creation.
- Complete and submit the closeout report on time. Failure results in delayed payment.
- Details within reports help you to obtain amendments.

What Happens if My Project Fails? -

- Worst Case....full immediate repayment of the grant.
- Not much better case....partial repayment of the grant.
- Project monitoring or audit findings are issued.
 - Must be resolved.
 - Could render municipality ineligible for future awards.
- Could result in restrictions placed on future awards:
 - Ex. Require third-party administrator

Be a Proactive Participant in Grant Management

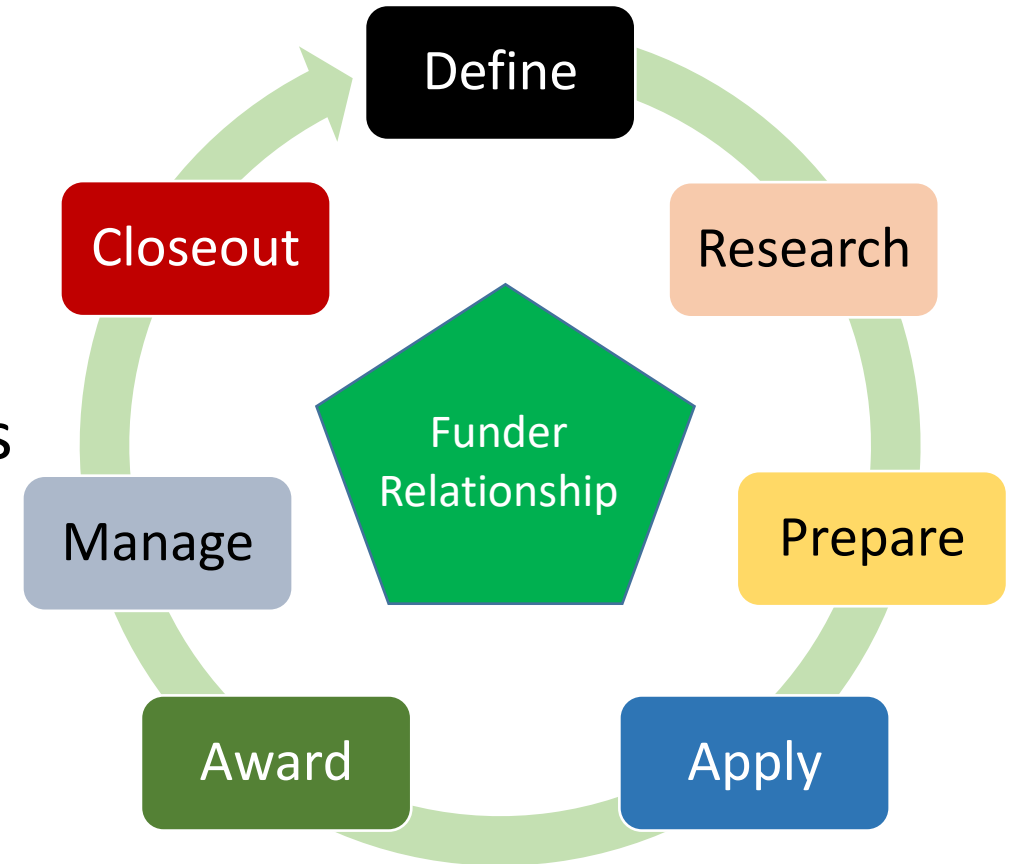
- Attend Grant Program Training, if offered.
- Assign a staff person to manage/oversee the grant, review consultant work. Consultants are not perfect!!
- Maintain communication with agency staff throughout the project.
- Ask questions, anticipate issues!

Grant Funder Relationship

- Approach your project as a team....funder, municipality, and consultants.
- Never hurts to contact funding agencies and ask about new or upcoming programs and changes. Could identify an opportunity.
- Use agency staff as a resource to plan for future applications and assist with funding strategies.
- The more funding agency staff know about future projects, the better.

Key Takeaways

- Understand Your Needs
- Be prepared—know who you're approaching and why
- Create an Inclusive Grants Team
- Find the right fit
- Always focus on the funder's motivations and interests—show what's in it for them
- Communicate, communicate and communicate to funder(s), team and community
- Prove that you are credible



Using AI to Search, Complete and Administer Grants

- Two Sessions in July-August, 2026
 - Virtual
 - In-person - Vote
 - Sessions will be staggered – two-three apart
- Session One – Grant Basics - Similar to this presentation
- Session Two – Using AI

U.S. Federal Government Grants

- Federal - <https://www.grants.gov/>
 - Environment
 - Infrastructure
 - Economic Development
 - Others
 - Learn to use Grants.gov - <https://www.grants.gov/web/grants/learn-grants.html>
- US Department of Transportation
 - <https://www.transportation.gov/grants/dot-navigator/find-federal-grant-opportunities>

State of Wisconsin Grants

- State of Wisconsin Grants
 - <https://doa.wi.gov/pages/SearchResults.aspx?q=local%20government%20grants#>
- WISDOT
 - <https://wisconsin.dot.gov/Pages/doing-bus/local-gov/astnce-pgms/default.aspx>
- DOA - Division of Energy, Housing and Community Resources
 - Community Development Block Grant-**Public Facilities** for Economic Development (CDBG-PFED) & Community Development Block Grant-**Economic Development** (CDBG-ED) -
<https://doa.wi.gov/Pages/LocalGovtsGrants/CommunityDevelopmentPrograms.aspx>
- Wisconsin Economic Development Corporation
 - <https://ruralwi.com/resources> & <https://wedc.org/community/>
- Wisconsin Housing & Economic Development Authority (WHEDA)
 - <https://www.wheda.com/lending-partnerships/community-and-economic-development>



Extension

UNIVERSITY OF WISCONSIN - MADISON
LOCAL GOVERNMENT EDUCATION PROGRAM