

Federal Grants 101





Photo Credit: Chesapeake Conservancy,
PA Team Stream Sampling

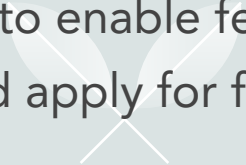
Grants from planning to closeout

- Planning
- Identification / Alignment
- Application Process
- Award Acceptance
- Implementation
- Compliance and Reporting
- Closeout



Planning - Registrations needed to apply

- Dun and Bradstreet Registration (DUNs) <https://www.dnb.com/>
 - Former official identifier for doing business with the federal government
 - Up to 30 days
- System for Award Management (SAM) <https://sam.gov/>
 - A government-wide registry for vendors doing business with the Federal government, and SAM registration requires annual renewal. SAM centralizes information about grant recipients and also provides a central location for grant recipients to change organizational information
 - Where you get your Unique Entity Identifier (UEI)
 - Up to 30 days
- Grants.gov
 - Designed to enable federal grant-making agencies to create funding opportunities and applicants to find and apply for federal grants, up to 30 days





Planning - Registrations needed to apply

- Grants Solutions <https://home.grantsolutions.gov/home/>
 - GrantSolutions supports Federal agencies throughout the full grants lifecycle – from pre-award planning through application, award, and closeout. As a shared service provider, GrantSolutions offerings solve for shared mission needs across agencies while incorporating unique business and regulatory processes for grant programs.
 - Up to 30 days
- Login.gov
 - Use one account and password for secure, private access to participating government agencies.
 - Same day
- USDA EzFed grants <https://www.usda.gov/ocfo/ezfedgrants>
 - ezFedGrants is the USDA solution that will let you apply for and manage USDA grants and agreements online.
 - About a week



Identification

Finding Funding Sources

- Grants.gov - [online tour](#)
- Grants Solutions
 - URL
- State Programs
- Foundations
- Federal Agency List Serves
- CCP Resources



Photo Credit: Conservation Latino, Latino Conservation Day at Masonville Cove

Photo Credit: Chesapeake Conservancy,
Habitat Monitoring Training



Identification - Outreach to Funders

-
- Reach out to past technical leads about your idea.
 - Reach out to current technical leads about your idea.
 - Review who was funded in the past.

Question Break

Application Logistical GO/NO GO Determination

- Determine eligibility
- Access funding floor or ceiling
- Review due date
- Review funding opportunity - READ IT WORD FOR WORD
- Attend webinars or review past webinars
- Determine fit for your project - will the grant fund what you want to do
- Send questions to FAQ email or technical lead

Review the Due Date

- Is there time to complete a good application?
- Do you have time to secure partner/support letters?
- Do you have the bandwidth with development and program staff?
- Are there vacations or other commitments that impact capacity?
- Do you need to get management approval for submission and can that be accomplished within the period allowed?



Photo Credit: JT Dean, Bay Bridge Run

Review funding opportunity

READ IT WORD FOR WORD

- Do not skim announcements.
- All requirements are not always listed.
- Make a to do list of required items so you don't miss something.
- Read even if you have already applied in a past cycle. They do change and the tweaks made can be very important.



Photo Credit: Chesapeake Conservancy; Spring PA Plantings_Juniata Spring

Alignment ~ Mission

GO/NO Go Determination

- Does this opportunity align with your mission?
- Does it fill a programmatic gap?
- Is this a funder the you want to work with/for?
- Is this an area where you need/want to grow?
- Can the project be completed satisfactorily with the budget requested?
 - If not, is there a reason to take on the project that may not have sufficient funding?
- Can the project be completed satisfactorily within the schedule requested?
- Do you have the capacity to do this work?
 - If not, will the budget support the need for additional staff; or contract support?
- Can all the required commitments be secured - internal and external? (e.g., staff, skills, equipment. software)



Photo Credit: Matt Provost, Kayaking at Quiet Waters

Attend webinars or review past webinars

- Listen to the presenter's language. Mirror that when possible in the application
- Webinars will generally provide areas of emphasis and focus.
- Provide opportunities for Q&A. Others questions are often very valuable.
- More detailed questions may need to be submitted for review and feedback.
- Presenters are often area experts for a given grant and can be a great resource outside of a given grant cycle.



Photo Credit: Cody Goddard, Wilkes-Barre

Application Process

Get organized

REVIEW THE PORTAL

- Templates - narrative, budget, letters of support/commitment
- Required forms - application, budget, lobbying, others you might see, logic models
- Optional items - maps, photos, title, surveys
- Review the portal for all documents, to review format and understand what is needed.
- Study the review rubric

TO DO LIST

- Deadlines (all items needed for submission)
- Review at a proposal kick off call with all proposal team members

Online to do list

Question Break

Templates - narrative, budget, letters of support/commitment

- Download all available templates and place in your proposal folder
- Set up folder/files in editable format (i.e. google docs or sharepoint)
- Include all reference materials from grant or grant portal
- Draft a letter of support template for partners to work from



Photo Credit: Matt Provost, Werowocomoco Archeology Surveying

Required forms

- Federal Forms – 424, 424A, 424B, 424C
- Lobbying
- Logic Models
- Contacts List

Sometimes Required:

- Resumes
- National register listing (historic/landmarks)
- Financials (most recent audited)
- Property owner letter of consent




Photo Credit: Chesapeake Conservancy,
Bush Creek

Other Items

Optional / Sometimes Required

Maps

Photos

Titles

Surveys

- Check format for documents
- Check file size limits and page limits for uploads



Photo Credit: Cody Goddard, Heron

Study the review rubric

- Look for and use language in the review rubric or criteria
- Pay attention to how sections are weighted
- Make sure your narrative and supporting documents address each point in the review rubric/criteria
- Follow the narrative format provided or the rubric order



Photo Credit: Chesapeake Conservancy,
Aerial River Shots Eastern Shore

Document Set Up

Narrative, Budget, Letters of Support, Attachments

- Set up template working from the funding opportunity
- Make sure template meets funding opportunity requirements - font size, margins
- Pay attention to submission format - Word, PDF, entry into a portal
- Are there length limitations on the entire narrative or sections. Are they page length or character counts.
- Make note of what can be included in the page counts and what is not included
- Assign leads from proposal team and others as needed and make sure they understand their sections, limitations on length and DUE DATE
- Check in weekly or biweekly depending on complexity
- Adjust deadlines as needed

Budget



- Set up template (if provided, use their template)
- Budget generally includes following categories:
 - Labor, fringe, travel, supplies, meetings, contractual, subawards, other, indirect
- Need to understand how your organization addresses indirect - do you have a negotiated indirect rate (NICRA) if not may be able to apply 10% de minimis rate
- Develop the budget from the bottom up. What hours will it take from various staff to accomplish the tasks in the grant narrative
- Do not forget grants management staff for reports and compliance and human resources if you are hiring staff



Photo Credit: Chesapeake Conservancy, Susquehanna Aerial

Online tour Federal Form 424A

Question Break

Letters of Support / Letters of Commitment

- Set up template for sending to partners
- Develop list of existing/potential LOS/LOC entities or people
- Set up tracking sheet for outreach to these partners, update weekly or as needed
- Assign leads to reach out to contacts
- Check in weekly or biweekly depending on complexity
- Adjust deadlines as needed
- Review as letters come in, especially when match is included
- File for submission

NOTES: Sometimes grants require these, other times not. Sometimes they limit the number you can include. Funding sources often specify if they want just LOS or LOC

Online tour LOS/LOC

Attachments

- Set up attachments tracking sheet on main workflow spreadsheet
- Set up templates
- Assign leads for securing attachments
- Examples include
 - Resumes/Bios, Negotiated Indirect Rate Letter (NICRA); List of Board of Directors; Top Funders for Past year; 990 Form; Audit or Single Audit, Photos, Surveys; Cover letter; Board resolutions; Certifications, etc.
- Upload into main application folder (“Draft Support Docs,” and “Final Support Docs”)
- File for submission



Photo Credit: Chesapeake Conservancy,
Spring Plantings Bucknell

Submission

- Upload all documents in official portal
- **GOAL, Submit 2-3 days before due date**

Potential submission issues:

- Document format - may need to be PDFed and have certain file size limits
- Too many pages or too many characters
- Internet access
- Portals get very busy and therefore slow as the deadlines approach.



Photo Credit: Miles, Wye

Award Acceptance

- Review all documents in detail
- Check to make sure that your deliverables are accurately represented
- Double check budget numbers and any match
- Understand reporting, compliance and invoicing timelines and requirements
- Secure signatures as needed and file documents
- Make sure to set up payment systems – ASAP, FF270

Switch to online agreement



Photo Credit: Sue Buyaskas, Chesapeake Bay
Bridge Run

Implementation

- Coordinate kick off call with agency Program Officer (PO)
- Follow your grant narrative and budget
- If you have any questions, ask your PO
- Do not make deviations from your work plan/narrative without talking with your PO
- Do not make budget changes without talking with your PO
- Meet program reporting deadlines

Compliance and Reporting

- Read all grant agreement documents and attachments carefully
- Follow any referenced requirements and make sure you understand those elements as well
- Often requirements will flow from your agreement to any sub awardees and or contractors
- If you don't understand requirements, ask for help
- Meet reporting deadlines. If you are going to be late reach out and ask for an extension

Closeout

- Talk with the PO 3-6 months before end of agreement about closeout requirements
- Take note of how long you have to retain program files after closeout.





Thank you

Susan Stephenson -

sstephenson@chesapeakeconservancy.org

PH: 443-510-6911

Carolyn Hill -

carolyn@chillfireproductions.com

PH: 410-353-3294

Housekeeping

Introduction

Asking Questions

Thanks to Sponsors

Presenter Backgrounds



Photo Credit: Chesapeake Conservancy, PA Team Stream Sampling

Questions