

## Grant Writing for the Rest of Us

by Tom Stocker

Want some free money for something you were going to pay for anyway? This article is not for those who write scientific, medical or biotech grants. This is for everyday companies, big or small that have an opportunity to take advantage of state and federal grants.

The RI Workforce Training Grant is a case in point. It is an annual grant open to all RI employers who have paid payroll taxes. The RFP for this year's grant is open now, but closes on February 5. You can find it on [www.rihric.com](http://www.rihric.com). All it takes to apply is a little thought and an ability to follow the directions.

The current grant covers almost any type of employee training. It can include everything from computer training, to sales training to CEO training to lean training. It also covers college tuition reimbursements, training seminars and conferences, and professional development training. Trainers can be in-house or consultants.

So, where do you start? Don't be intimidated by the number of steps or by having to write essays. Grant writing needs to be done in a logical order. Every business can do it. When internal help is not available, consultants like my firm or other sources can help. Just don't wait until the last minute.

Step 1: Collect information - history and plans. I counsel my clients to review their last two years worth of accounting records to see how much was spent and for what. You may have to look at various expense categories to get the full picture of what you have spent. Many grant naysayers are

surprised when they see how much they have been investing in the grant categories.

The next thing I have them do is review their current year budget for the same things. I also recommend they discuss the intent with all managers who may have ideas for training they may want to do for the following year. For the significant discount the grant offers, most times it is a very good deal to pull that training forward.

Step 2: Organize your programs. For this grant, few of you will have only one training need. After you have looked at all the different categories that can be considered training, you will be able to put things into several major categories. You will need to estimate the cost for each, time periods training will be conducted and by whom. Once you have those together estimate the costs for each (more about costs later).

Step 3: Think about how you will define the success of each program. Most grants want to have tangible evidence the money they gave you was well spent. The criteria for success should be quantifiable and it needs to be documented. Required training may be as simple as a count of the number of people trained. For CE credits, the number of credits required was earned. For other training it may mean follow-up work is required.

Step 4: Write your detailed narrative. The RI training grant, as do most grants, wants a short summary of your request. Put that aside until you've finished all of the details. It will be much easier to summarize once you have finished the details. The RI grant

also asks for a needs statement. Put that aside as well.

Start your narrative with a statement about how many different programs you will be doing and note you will describe each individually. Then take each program one at a time. Name each and describe what it will do for the company. If you have an outline provided by the trainer, use that description as a base statement and modify it to fit your company's need. Include who (level) will be trained. Names aren't important, general positions are, such as administrative staff, factory workers, managers and so on.

Briefly write who will be doing the training. If you aren't sure right now, use the company or trainer you think you will use. You can change your mind and let the grant provider know when you submit your quarterly update report. Include where the training will take place, in-house, local or out of the area. One sentence is all you need. Indicate the month or months you expect to conduct the training how many hours the training will take. If you aren't sure of the dates that is ok, pick a date as a placeholder. You will be able to change it in your updates.

Step 5: Write the executive summary and needs assessments. Now that you have completed all the details, you can summarize what you are trying to accomplish. The executive summary should start with a description of your company and its unique product. Use your elevator speech. Next write a summary of the training programs you will be conducting. One or two sentences for each are fine. For the smallest of programs, lump several together. Keep it brief.

Your needs assessment should be a description of the competitive pressures your company is under and the need for a highly trained staff. In general terms

describe your expectations for improvements to the business.

Step 6: Document your outcome expectations and evaluation plan (from step 3). Complete this section in the same manner and detail as step 4. It must be clear to the reader what it is you expect to happen and how you plan to prove or measure it.

Step 7: Use an Excel spreadsheet to estimate your budget. *Be careful with your cost estimates.* In many cases you don't yet know the exact costs or who will do the training, so estimate high but reasonable. It is much better to have the money available and not use it, than find you grossly underestimated the cost and must now compromise the training. Include an evaluation line for each program. Evaluation costs are reimbursable.

Lay out each program in the same order you wrote your narrative. Include columns for each program description, each quarter in the grant and a total. By item, insert the cost in the quarter you wrote in your narrative.

Once you have completed your spreadsheet, you will have totals for each quarter and the grand total of all costs you will be requesting for your grant. You will also be able to complete your budget narrative.

Step 8: Complete your budget narrative. The budget narrative simply helps the grant raters understand how you estimated your costs. You've used Excel to do that. Now write out the calculations for each line. You don't have to do the quarterly breakdown calculation, do each line in total. *Important: The math must agree with the budget details for each item and in total.*

Step 9: Fill out all the forms at the beginning of the grant package and check over your work. **VERY IMPORTANT: *have someone read over your completed grant package.*** This will help make sure your commentaries

are clear and make sense, that the numbers all seem reasonable, the logic is sound and even eliminate grammatical errors.

the end, your IRR for whatever the grant is for will rise dramatically and your cash flow will benefit greatly.

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