

Steps for Grant Readiness

1. **Identify funding needs.** Clearly define the project or program that requires funding and consider how it aligns with your organization's mission and strategic goals.
2. **Research grant opportunities.** Look for grants that match your organization's needs, focus areas and eligibility criteria.
3. **Assess eligibility.** Make sure your organization meets the eligibility requirements for the grants you are considering.
 - When applicable, contact the program specialist to introduce your idea and discuss eligibility.
4. **Develop a project plan.** Create a detailed project plan with objectives, timelines and a budget to demonstrate readiness and feasibility.
5. **Create a grant calendar.** Develop a timeline for application deadlines, proposal drafts and submission dates to stay organized and on track.
6. **Gather documentation.** Prepare essential documents such as your organization's mission statement, financial statements, tax-exempt status and performance reports.
7. **Build a team.** Assemble a team responsible for writing grant proposals, including members with expertise in finance, project management and writing.
8. **Complete an organizational assessment.** Develop an inventory of existing resources and capacity, including documents, policies and accounting capacity.

Must-Have Documents

- Mission statement
- State statute verifying your public agency designation
- Organizational chart
- IRS determination letter
- Names and affiliations of your current board of directors
- List of your current programs
- Strategic plan or goals and their progress
- Current financial statements, tax returns and audits
- List of prior awarded grants and partners

Do You Have Priority Projects?

Do not chase the money. Target grant opportunities that match your priorities, ensuring alignment with organizational needs and avoiding unrelated funding pursuits. Educate leadership with training and resources regarding the grant process, including identification, application and management for informed decision-making.

- **Strategic alignment:** Make sure priority projects are directly aligned with the organization's strategic goals and mission; maintain focus on core objectives.
- **Clear objectives:** Define specific, measurable objectives for each project to guide development and evaluation, ensuring clarity and purpose.
- **Community needs:** Base project prioritization on comprehensive community needs assessments, addressing the most pressing issues.
- **Resource feasibility:** Evaluate available resources, including staff, time and budget required for successful implementation.
- **Impact potential:** Prioritize projects with the highest potential for meaningful impact, maximizing benefits for the community and stakeholders.
- **Sustainability plan:** Develop sustainability plans for each project, ensuring long-term viability and reducing reliance on grant funding.

Review the Eligibility Requirements

- Montana Department of Commerce grants have specific eligibility requirements.
- For many grants, private or nonprofit entities need to apply through a fiscal sponsor and complete a subrecipient agreement if awarded.
- Contact the grant administrator to talk through your project and verify eligibility.

Identify Your Need

- The primary driver of the proposal
- Establishes importance and urgency
- Provides context and foundation
- Articulates the need for funding
- Increases competitiveness
- Supports goals and objectives
- Goes beyond “We need money!”

When Articulating Need, Do

- Narrow the focus.
- Emphasize people served or services offered, not just what the applicant wants.
- Give a detailed description of the current concern or condition. Include supporting documentation such as plans, pictures, letters of support, etc.
- Address causes or contributing factors, as well as past and current efforts to fix the problem.
- Describe the significance of the problem. What will happen if the need is not addressed?
- Describe the target population.
- Connect the need to the mission or goals of the organization.
- Support the need with relevant, recent evidence.
- Compare the proposed project to other projects.

- Be compelling, but rational. Don't overstate need, impact or capacity.
- Demonstrate hopeful urgency.

When Articulating Need, Don't

- Editorialize.
- Make assumptions, particularly about the grant reviewer's familiarity with your organization, community or project.
- Focus only on your organization, rather than broader community.
- Rely solely on anecdotes instead of data.
- Cite facts and figures without supporting documentation or context.
- Include irrelevant data.
- Overstate or exaggerate the projected impact.

Planning for Effective Grant Management

- Establish a primary and secondary point of contact. Remember that changes to contacts should be communicated as soon as possible.
- Understand grant requirements.
- Create a detailed project plan.
- Establish a budget management system.
- Prepare for regular monitoring and reporting.
- Maintain open communication.
- Understand compliance and risk management.
- Evaluate and document impact.

Do You Have a Team?

- Do you have capacity, including time?
- Do you have subject matter experts?
- Is your data person involved?

- Does your team extend beyond your organization?
- Who is the grant manager? This person is the champion of the project. Are you hiring someone external or assigning the task to someone internal?
- Will the grant manager participate in the grant application?
- Are the grant manager and chief financial officer working together on the fiscal management?

Do You Have Partners?

- Funders expect collaboration.
- Successful grants require partnerships to ensure community impact.
- Cultivate partnerships before grant applications open. This may include project specialists at Commerce.
- Involve partners in the project design phase.
- Guide partner letters of support.
- Include meaningful commitments from partners demonstrating engagement and action.

Why Do Partnerships Matter?

- Funder expectation or requirement
- Enhanced credibility and competitiveness
- Broadened scope and impact of projects
- Decreased risk of public/community resistance
- Potential for pooling resources and expertise
- Increased chances of sustainability

Benefits of Partnerships

- Nonprofits
 - Access to new funding opportunities

- Shared mission and goals
- Public agencies
 - Opportunities to strengthen community ties
 - Enhanced service delivery
- Government
 - Alignment with public policy
 - Improvement of community services

Key Elements of Successful Partnerships

- **Clear objectives:** Define shared goals and outcomes.
- **Communication:** Establish open and regular communication channels.
- **Trust and respect:** Build mutual trust and respect among partners.
- **Defined roles:** Clearly outline roles and responsibilities.

Strategies for Building Strong Partnerships

- **Networking:** Attend industry events, workshops and conferences.
- **Collaboration platforms:** Use digital tools to facilitate collaboration.
- **Shared vision:** Develop a common vision and strategy.
- **Memoranda of understanding:** Formalize agreements or MOUs.

Potential Partners

- Local businesses
- Local property owners
- Chambers of commerce
- Municipal governments
- Historical societies
- Nonprofit organizations
- Educational institutions

- Tourism boards
- Community foundations
- State and federal agencies
- Other downtown organizations

Letters of Support

- Successful applications include letters of support from a range of entities.
- The organization applying for the funding can draft a template letter of support for the partner organization. However, the partner organization should personalize the letter before signing and submitting it.

Components of a Strong Letter of Support

- Always include a date, address, printed signature and wet signature. If applicable, use the organization's letterhead.
- Opening: "I am writing on behalf of (organization) to express our enthusiastic support for (applicant organization) applying for..."
- Second paragraph: Introduce the organization submitting the letter of support and its relationship to or partnership with the applicant.
- Third paragraph: Explain the shared vision.
- Last paragraph: Closing statement, such as, "We look forward to..."
- Closing remarks: "Thank you for considering... Please feel free to contact me (support organization's info) at phone number and email..."
- Sign the letter with the title/affiliation.

Implementation Plan

Consider using the [SMART](#) framework:

- **Objectives:** The specific and measurable objectives are a roadmap for achieving the desired outcomes, showing funders a clear path to success. Well-crafted

objectives aid in assessing the feasibility and scope of the project, reassuring funders of its practicality.

- **Outcomes:** Clearly defined outcomes show the long-term benefits and impact of the project, helping funders understand the value and relevance of the investment. Strong outcomes demonstrate alignment with the funder's mission and priorities, increasing the proposal's attractiveness.
- **Methods:** Detailed methods outline the approach and techniques to be used, illustrating the project's feasibility and the team's capability to execute it. Strong methods demonstrate innovation and evidence-based practices, appealing to funders looking for impactful and efficient solutions.
- **Outputs:** Clearly defined outputs translate to tangible, measurable results that can be tracked and evaluated, giving funders confidence in the project's accountability. Outputs serve as benchmarks for success, enabling funders to assess progress and impact throughout the project's lifecycle.
- **Action Steps:** Specific action steps outline the timeline and tasks necessary to achieve the objectives, showing funders a well-organized plan. A detailed action plan ensures that the project is manageable and that resources will be used effectively, reducing risk and increasing funder trust.

Timeline and Budget

- A timeline should include:
 - Timeframe
 - Action steps
 - Responsible party
- A budget should include:
 - Supporting bids/documentation
 - Secured match requirements, e.g., letters from secured sources, bank statements showing funds earmarked for said project, etc.
 - Total costs
 - Partner or other funding contributions