

# *Helpful Tips for Developing Fundable Proposals*



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# An Introductory Thought...

"Anything that is sustainable,  
must mimic a process already  
found in nature."

-Anonymous



# Getting the Most Out of This Session

- Get the big picture.
  - What do I need to know to get started?
- Don't sweat the details.
  - The goal is to give you the basics and strategies for learning how to get to the details when you need them.





# Objectives

**What's Your "WHY"?**

**Sources of support and assistance**

**The funding mechanisms**

**Best role for your organization**

# Outlining An Approach

- **What are your proposal writing strengths and what are your challenges?**
- **What is your area of interest (e.g., STEM programs, Youth, Financial Literacy, etc.)?**
- **What “need” are you trying to address in your community?**
- **What topics are most important (e.g., budget preparation)?**



# Things To Consider...

- Before you launch into the proposal development process, consider the following questions:
  - Do you have sufficient time to prepare a high-quality proposal?
  - Are the facilities and space available to you appropriate and sufficient for the project?
  - Does the sponsor allow full recovery of facilities and administrative (indirect costs)?
  - Does the sponsor require any cost sharing of direct costs?

# What Strings are Attached?

- You must help ALL of the people in the target group regardless of faith or political persuasion.
- You cannot use the federal government's money to recruit members for your church or organization.

# Planning Ahead

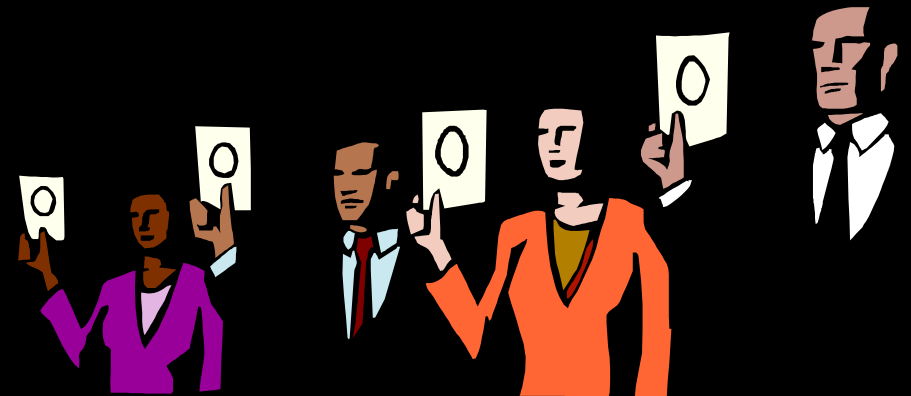
Once you have identified a funding opportunity, obtain and review the guidelines and all other materials pertinent to preparing a proposal for the particular sponsor.

Participate in any Pre-Award Technical Trainings offered by the funding agency.



# Cheat Sheet

- Will the agency fund your needs?
- What are the eligibility requirements?
- How many pages, what font?
- Are there any priorities or preferences listed by the agency?
  - Preferences may be for specific subsets of the population. (Women, Teens, Disabled, Disadvantaged Communities...)



# Cheat Sheet (Cont.)

- **Priority means the applicant's score is enhanced by speaking to the priority.**
- **How many awards will the agency grant?**
- **Are there any matching requirements?**



# Don't Forget...

- Plan your WORK and work your PLAN!
- Discuss equipment and where it is going to be housed
- Solidify partnering relationships early in the process through Letters of Support

# Follow the Recipe

Introduce

Introduce your organization's previous successes.

Describe

Describe your group's qualifications as an applicant for funding.

Be

In an application to a foundation or federal agency, be as extensive as allowed in the introduction or background statement.

# Gather Your Ingredients

- Rationale
  - Problem Statement
  - Justification
  - Statement of Needs
  - Assessment of Needs
- 
- When funders use these terms, they want hard data.
  - Compare data on at least two levels to illustrate your need.



# Basic Parts of the Proposal

Introduction	Rationale	Methodology
Key Personnel	Evaluation	Budget

# The Introduction



# Program Objectives

Do not use words like these to begin your objectives.	To Provide... To Establish... To Create...
Use these and other words to indicate measurable objectives.	To Increase... To Decrease... To Reduce...

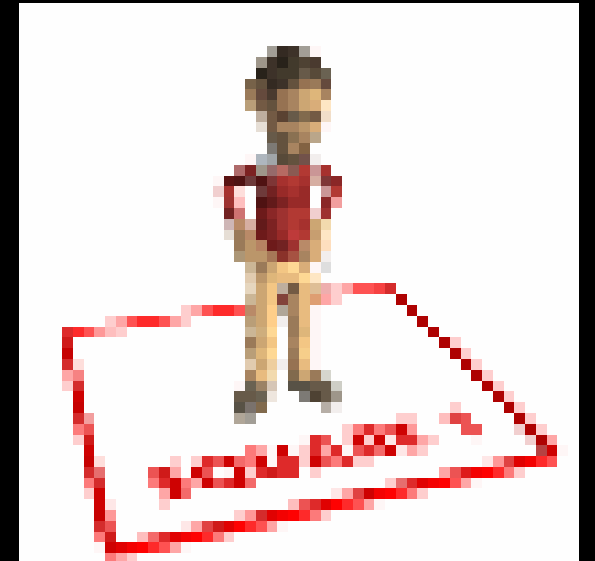
# Blending The Ingredients

Tell the funder how you will address your needs and objectives to achieve the desired outcome.

In the Methodology, the terms may be different, but you want to concentrate on **“how.”**

# Look For These Terms

- Methodology
- Implementation
- Strategy
- Plan of Operation
- Statement of Work
- Description of Work Plan





## Discuss Key Personnel

In this section, discuss the persons who will be **paid**. Why are they qualified to manage this program?

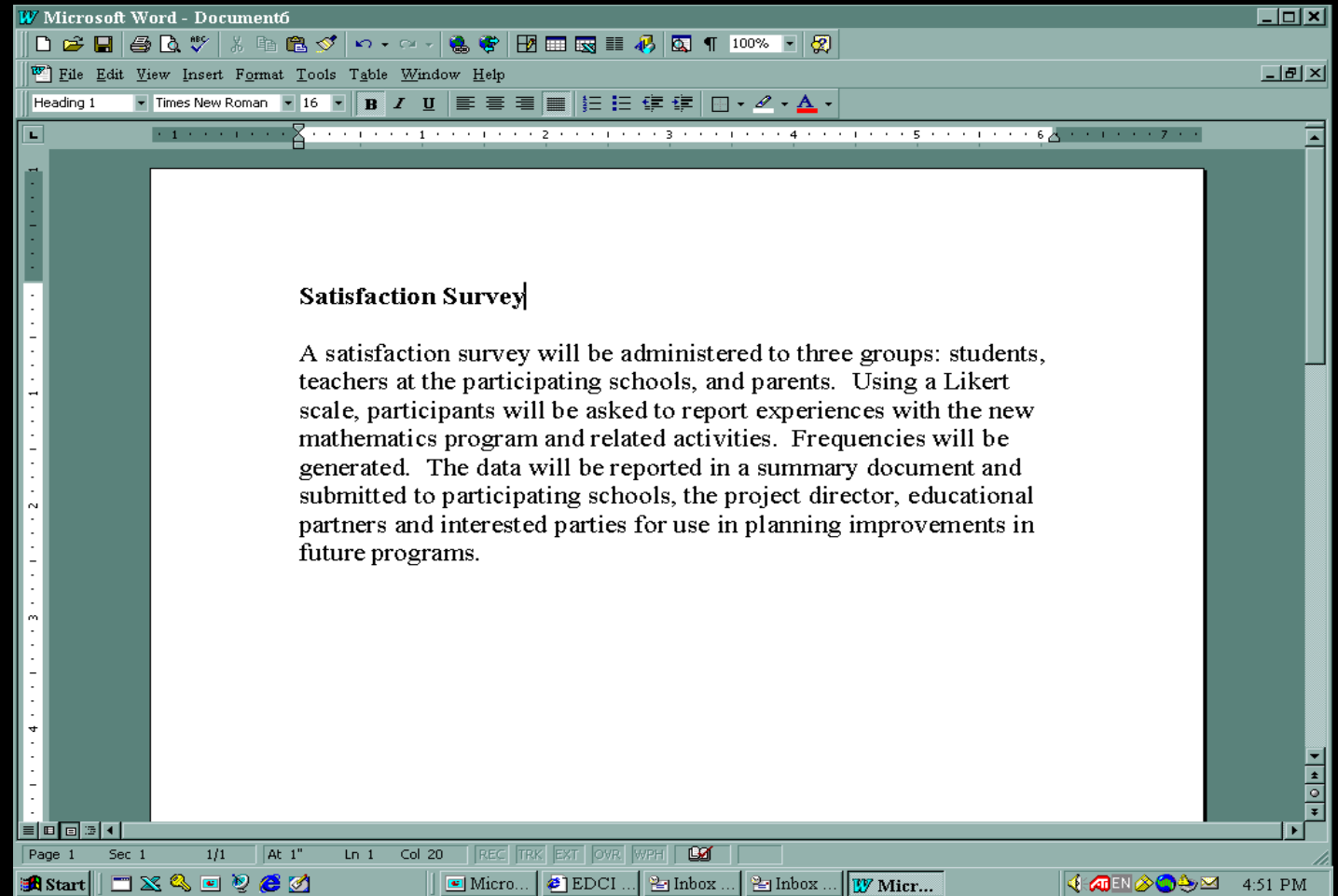
Include a job description if you have not yet found a person to manage a key component of the program.

# Six Deadly Phrases to Avoid in Proposals

- **Best Efforts**
  - **Legal Requirement to Go Beyond Normal Duty**
- **Ensure**
  - **Binding Legal Agreement**
- **Guarantee**
  - **Amounts to Warranty**
- **Partner/partnership**
  - **Assumes Liability for Each Other's Acts, Debts, Omissions**
- **Will Meet Your Needs/requirements**
  - **Holds You Liable**
- **Joint/jointly**
  - **Ownership Will Be Shared by Other Parties**

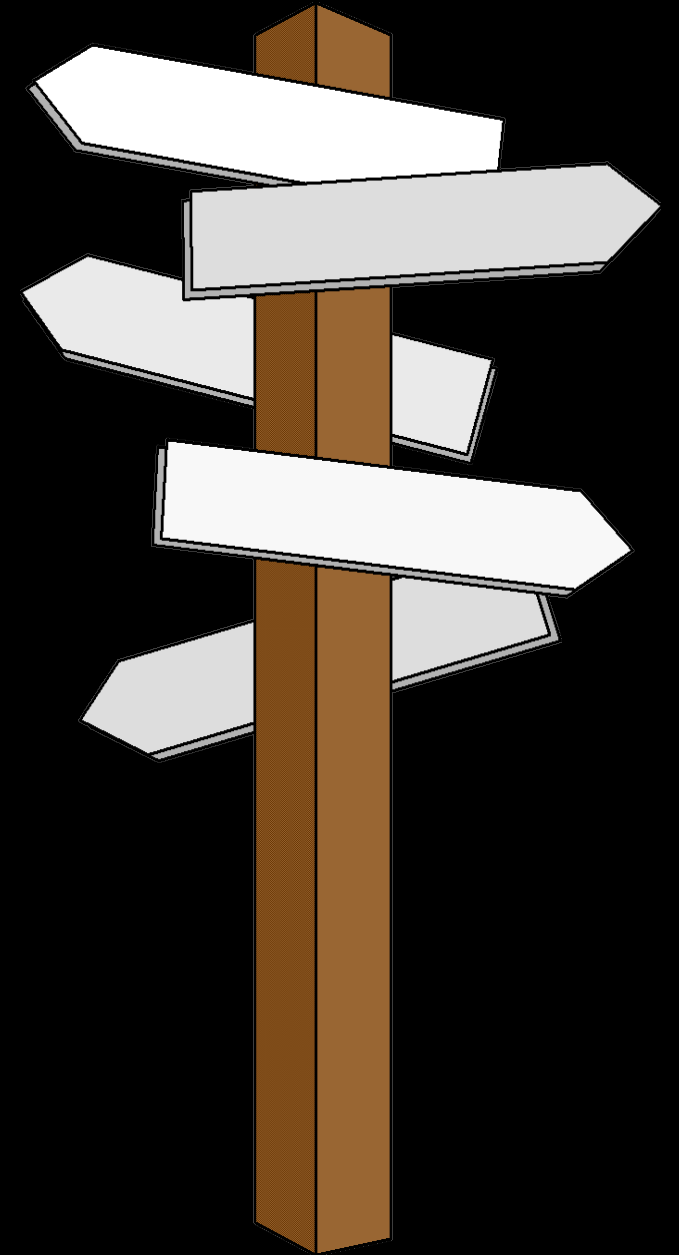
# Developing Evaluation Strategies

- **Pre- and Post-Test Assessments**
- **Focus Groups**
- **Satisfaction Surveys**
- **and on and on...**



# Using Graphics to Highlight Text

- **Charts**
  - **Organization**
  - **Project Work Flow**
  - **Decision Making**
- **Tables**
  - **Timeline**
  - **Skill Matrix**
  - **Staffing Loads**
- **Figures**
  - **Financial**
  - **Statistical**
- **Pictures**



# The Two Part Budget

- Summary Budget
- Basic categories are shown in summary.
- Arrange material so that numbers line up.
- Budget Narrative
- Discuss why you need each line item
- Include the numbers again



# Developing the Budget

## Direct Costs

- **Personnel**
  - **Salary (e.g., 12 months, 9 months, Summer)**
  - **Fringe Benefits (e.g., Workman's Comp, Insurance, Vacation, Social Security, Pension)**
- **Other Direct Costs**
  - **Consultant**
  - **Travel**
  - **Equipment/Supplies**
  - **Subcontracts**

## Indirect Costs

**(Matching/Cost Sharing are Not  
Required on Contracts)**



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Go C:\my documents\EPA 2000 draft budget1.xls

Use a Spreadsheet

EPA 2000 draft budget1

	Quantity	Unit	Extended
<b>I Personnel</b>			
<b>Environmental Scientists</b>			
High End	5	\$45,500	\$227,500
Middle Level	5	\$38,500	\$192,500
Entry Level	5	\$28,500	\$142,500
<b>Scientific and Technical Support Staff</b>			
Middle Level	1	\$40,000	\$40,000
Entry Level	1	\$31,500	\$31,500
<b>Technical Writing Capabilities</b>			
Middle Level	1	\$36,500	\$36,500
Entry Level	1	\$30,000	\$30,000
<b>Total Personnel</b>			<b>\$700,500</b>
<b>II Benefits (27% of Total Personnel)</b>			<b>\$189,135</b>

Draw AutoShapes

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# Budget No No's



- **Budget**
  - **Math Errors**
  - **No Justification**
    - **No Clear Role for Personnel or Consultant(s)**
    - **3rd Year Request for Equipment**
  - **Budget Exceeds Allowable Amount**
  - **Budget Was Insufficient**
  - **Incomplete Forms**

# Make the Reviewer Remember You



The justification, rationale or needs assessment is one of the most critical parts of the proposal.



Use statistics, and data from authoritative sources and testimony from persons known to be knowledgeable about the situation.



Make the reviewer remember your data.

# Avoid The Big No-Nos!

Failing	Failing to Follow the Directions
Trying	Trying to Hide Service Programs As Research
Applying	Applying for Projects Beyond Your Training or Experience
Asking	Asking for Too Much or Too Little Money
Failing	Failing to Obtain the Organization's Permission
Writing	Writing a \$1M Proposal in Three Days
Forgetting	Forgetting to Give The Agency or Foundation What It Wants
Finding	Finding Money to Pay Your Salary
Applying	Applying Blindly on an Announcement



# Conducting the Literature Search for Your Proposal Content

**Journals**

**Specialty  
Libraries**

- National Library of Medicine

**Conference  
Proceedings**

**Institute  
Homepages**

**Government  
Publications**

**How Do I Find These Resources?**

**[www.google.com](http://www.google.com)**

# Last Tips for Everyone...

Be	Be specific and avoid buzz words and jargon.
Include	Include a glossary if you use acronyms.
Don't take	Don't take it personal if you don't get funded the first time.
Prepare	Prepare to give up having a life for about two months for 1st timers - two weeks for experienced persons.



# Proposal Checklist & Evaluation Form

- **Use Your Smartphone To Scan This QR-Code**
- **It's A Helpful Resource To Guide You As You Develop Your Proposal**

# Thank You!

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