



Worksheet for Grant Training Participants

To be filled out BEFORE attending the training

Significant considerations

- Remember deadline and timetables
- Adhere to grant writing guidelines
- Be specific in developing project performance targets, milestones and activities
- Clearly justify your project's purpose; answer "So what?"
- Consider your proposal's competitiveness – are there others doing similar work?
- Evaluate project's proposed impact
- Develop relevant budget justification and detail

The following sections (abstract; target beneficiaries; performance targets; milestones; activities; and budget) walk you through the steps to developing a coherent grant application!

Abstract

Short summary of the project. Understandable to someone unfamiliar with your work – you never know who will be reviewing the grant and you want the abstract to grab the reader/reviewer from the start. Avoid jargon, hyperbole, and overly-technical language. Focus on your project, avoid grant statements and digressions.

Target Beneficiaries

Who will benefit from this project (short-term and long-term). Where will the project happen? Is this in a community that has particular needs/challenges? Be specific.

Performance Target

Overview

Performance targets are specific outcomes that define program success. In other words, performance targets are aiming points – reaching them defines achievement. Performance targets are about change. In most cases, this means the number of people served by a program or project that modify a behavior.

Building performance targets:

1. Identify the changes or conditions you seek;
2. Specifying the degree of change you consider a success;
3. Estimating how many people/organizations/farmers/communities will change;
4. Stating how you will verify that it happened

Example from the Colorado Building Farmers program: 100 direct market producers develop a business plan in a short course led by local agribusiness leaders, leading to one new marketing strategy and one new business network contact.

Write a performance target for your project: _____

Milestones

Overview

Critical interim steps that projects must attain. Attaining these milestones leads to the achievement of performance targets.

Things to keep in mind writing milestones:

1. Milestones must be specific and measurable (i.e., include numbers and dates).
2. Focus on the target beneficiaries.
3. Keep the performance target in mind; milestones should contribute to achievement of the performance target.

Example from the Northern Colorado Food Cluster Winter Market:

Performance Target: 50 food system stakeholders will extend their market season using the Winter Markets, leading to 15% increase in annual sales and initial market access for three new food businesses.

Milestone 1: Fifty ag producers and food businesses recruited and accepted as vendors.

Milestone 2: Vendor sales for the winter market season show sales volumes equivalent to at least 15% of summer market sales for existing vendors.

Milestone 3: Three new producer or food vendors are accepted into the Winter Markets and use it as their initial market channel.

One way to get to milestones is to start with activities and ask the question “so what?” until you get to a specific change or impact.

- Outreach to summer market vendors to recruit those interested in market season extension.
- Recruitment of vendors based on list of summer market applicants.
- Scheduling of 12-15 markets from the months of November through April when other farmers markets are inactive.
- Tracking of customer traffic and sales to report and measure vendor sales progress.
 - This is your performance target!

Write 3 milestones for your project: _____

Activities

Overview

Actions are employed by the project to achieve milestones. These are usually the most visible part of a specific project.

Example from a hypothetical food hub project:

Performance Target: Fifteen producers get access to new wholesale accounts, resulting in \$150,000 in new revenues and increase of 10% in production volume across the set of producers.

Milestone 1: One-on-one sessions with 20 producers by 12/31/2016. 15 producers proceed to join hub cooperative.

Milestone 2: Develop production plans with 15 food hub producers by February 15, 2017 that include specific production areas and crops dedicated to wholesale account sales forecasts.

Milestone 3: Distribute expected product availability and price sheets to wholesale account managers by March 31, 2017.

Activities: Producer technical assistance one-on-one sessions to establish pre-season production plans, agreed upon price points, post-harvest quality control check sheets, wholesale account sales forecasts, and final product availability and price sheets.

Write 3 activities for your project: _____

Performance Target:		
Milestone 1:		Milestone 2:
Activities:		Activities
Milestone 3:		
Activities:		

Budget development and justification for your grant

Overview

Developing a realistic budget is really fundamental to your grant proposal. This includes several considerations:

1. Only ask for the amount of funding you need in categories explicitly listed as allowed in the RFP. Grant review panels will scrutinize large, unusual or non-allowed requests.
2. Make sure you can justify and provide detail for the full amount of your request in your budget narrative. For personnel costs, link to activities and expected hours per activity where possible.
3. Choose project partners in whom you have confidence to complete the work and use the grant resources wisely. If matching funding is required, make sure you can identify and document who, how much and when this matching will be provided to your project. Letters with this information are commonly required in grant submissions.
4. Select a fiscal agent and grant manager before you apply for a grant. These may be two different people and organizations. Your fiscal agent¹ will hold the grant funding in its account and pay invoices based on this fund. A grant manager will track your expenses under the grant, make sure you do not exceed your budget line items, and track any in-kind (time or materials donated to the project) that you may have committed to. The grant manager will also record any income the project takes in such as registration fees for workshops.

Your project's budget will consist of two parts: 1) the budget numbers with detailed breakdown by subcategories, and 2) the budget narrative. Use the following sections to build your budget. Note: this is only a worksheet! Please complete your project's budget on the required form(s) where provided.

Budget outline

List activities that will be completed under your project, along with an estimated cost for each one.

Activity	Who	When in project timeline	What	How much it will cost
<i>Ex. Hold a networking meeting for farmers interested in selling to food hub.</i>	<i>Estimated 20 farmers + 4 people from project planning committee</i>	<i>Month 2 (Nov 2016)</i>	<i>1. Reception 2. Handouts on pricing & food safety requirements</i>	<ul style="list-style-type: none"> • <i>Food (24 people at \$5/pp)</i> • <i>Building rental (\$50)</i> • <i>Copies (20 people * 10 copies each)</i>

Budget line items

Using the information you noted in your budget outline above, now compile your budget by line item (e.g. group all personnel costs together, by each year of your project).

Typical items	Include <i>(this detail will become your budget justification)</i>	Example
<u>Personnel</u> - people who will receive salaries + benefits or hourly compensation for work on the project)	Hours worked * hourly rate (or percentage of time spent on project if salaried), for each individual	
<u>Equipment</u> – purchases necessary to the project (if allowed)	Cost, anticipated useful life of item, rationale for purchased	
<u>Travel</u> – to workshops, to farms or ranches, to project pilot sites	Purpose of trip and miles to be traveled * reimbursement rate * number of travelers	
<u>Supplies</u> – copies, seeds, small equipment	Reason for purchase and number of items * per item cost	
<u>Other</u> – any items not mentioned above but needed (rentals, etc.)	Reason for purchase and cost of each item	
<u>Indirect costs</u> – these funds cover your organization’s overhead and may be capped at 10% or 15% of your project’s total direct costs	Typically calculated as a percentage of all direct costs (e.g. personnel + equipment + travel + supplies + other).	

Budget justification

For each line item you noted above, use the required text to build your budget narrative, so the grant reviewers understand the purpose and specific costs of each item you intend to use for your project, and why each line item is relevant to your project’s success.

Checklist

- Did you complete your budget on the correct form(s)?
- Include ONLY costs *allowed* by the grant program?
- Did you include any required letters justifying matching funds contributed to your project?
- Did you include an explanation/narrative for each line item requested in your budget?