CLEAR
HORIZONS
CONSULTING LLC
Grants • Research • Policy

1. **Grant identification**

   We perform grant exploratory research for all of our clients on roughly a quarterly basis. We also sign up for foundation mailing lists on your behalf in order to monitor any new grant announcements. Once a possible funding line is found, we proceed through the process in (2) below. If you ever come across a grant or fund that you think might work for your goals, email it to us. It's possible we have already seen the grant or it's possible that it is new and we have not come across it - always better to be safe than sorry and we are happy to look into anything that looks promising.

2. **Grant assessment and methodology**

   We perform a complete project alignment and eligibility assessment for each grant that we recommend moving forward on. There are two stages to this process:

   2.1 An initial look at alignment and general eligibility to determine if the grant is worth a deeper dive into the Request For Proposal (RFP), which is the document(s) that outlines all the granting details (eligibility, fund availability, etc.); and

   2.2 If it passes the first assessment, we complete a thorough review of the entire RFP, granting organization and projects that were previously awarded - only those grants that pass the second more detailed assessment are recommended for application.

   This process is very intentional, it saves time and saves you funding. Since our goal is to secure you funding, we make every effort to do so as efficiently as possible.

3. **Direct personal contacts with granting organizations**

   Direct connections are like gold. They can even get you around some of the stipulations in an RFP that would otherwise make an applicant ineligible. If you ever have or make a direct contact with a granting organization - tell us asap, especially if they suggest that you should apply despite RFP limitations. We will likely ask you to establish a meeting between all parties - at which point we can evaluate their interest in a given projects as well as available funds. Alternatively, we can reach out to your contacts on your behalf.

4. **Grant request amount**

Our research in (2) above includes an assessment of maximum grant request, fund total, and how much the organization typically awarded in the past, including for projects similar to yours.

First, we strongly discourage requesting more funding from an organization than their "maximum request" amount – the request will likely be rejected, *unless* you have a direct networking connection and are told to request more.

Second, the amount the organization has awarded in the past, and the number of awards they make in a year gives a good idea of how much they are willing to invest in a single project/award.

Third, the total amount of funds gives us a sense of how competitive the awards are. That is if they say that the total amount of funding available for 2021 is $ 100,000, and the maximum award is $ 20,000, you can assume that they will award at least 5 grants - at a national level this could be very competitive.

However, in these instances, it may be prudent to ask for less than the total amount, especially if they have previously rejected your grant requests, you do not have a direct contact with them, and/or if they have not awarded other organizations with similar projects the maximum amount in the past.

We can attest that from our own conversations with grant managers at state-level foundations, that they may shy away from large requests by organizations they do not personally know.

On the other side of the coin, it can also make a lot of sense to request up to the maximum request amount - In these cases, the foundation can even decide to award you partial funding.

When we prepare grants for you we are making an evaluation of how much to request based on the above factors. *Typically, it makes sense to request the maximum award amount - we will often recommend this, unless there is a specific reason to do otherwise.*

5. Grant Writing

We review the granting organizations verbiage, mission, vision statement, past awarded projects prior to and during the grant writing process – a substantial effort goes into this. Our goal is to frame your project in a way that directly aligns with the granting organization's funding goals and mission. Sometimes this means using their same language, and more or less "spelling out" how what you are doing provides a solution to their goal/mission. There should be no question

in a grant reviewer's mind as to how you are furthering their goals with your work. This approach does take more time compared to the copy and paste approach that some grant writers may take. However, it also ensures the best chance for getting funded. We a big proponent of putting in the extra customization effort.

6. **Grant Awards and Follow up**
Regardless of everything above, grants are still very competitive. A grating organization's total fund may shrink (e.g. during COVID). Or they simply may decide to give out more grants for less money each, or shift what types of projects they are funding. There are many uncontrollable factors.

We will follow up with the granting organization after a grant is awarded or rejected. In the event that the award amount is much lower than requested (e.g. Cliff Bar), or was denied all together, it's good to gently and tactfully inquire why the award was less than the request. These conversations can clarify if the project was out of our control, or if there are ways to improve future requests. Sometimes a granting organization simply wants to meet you first so they can better advocate for your request to be fully funded.

7. **Business Correspondences**

Emailing - Emails are ideal for any issue with a 2+ business day turnaround timeline. We typically get to emails within 2 business days. This is especially the case if you have additional requests that take more than a couple sentences to respond or fulfill. Otherwise, we would be on email all day and would not get to write your grants. If it's past 3 days, just send us a reminder email.

Text – We are open to receiving texts regarding your grant and client support needs. Please limit texts to questions, comments, or concerns that refer to day-of action items, or last-minute changes or cancellations. Needs that have a turnaround time of 2 or more business days should be initially addressed via email.

Phone – We love to work with our clients on Zoom or over the phone. Telecommunications are best suited for scheduled calls or more complex, day-of or last-minute changes or cancellations. Needs that have a turnaround time of 2 or more business days should be initially addressed via email.