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<div align="center">Report from my sabbatical leave</div>

<div align="center">Spring 2008</div>

My one term sabbatical leave project, that in the spring of 2007, was deemed meritorious enough by my colleagues and therefore funded for Spring of 2008, focused on learning grant-writing skills. I do want to preface this by saying that even though I did take the series of classes I had intended to and that was well worth it, I did not focus yet on writing the grant for many reasons, the main being that we are presently, at the beginning of September 2008, unsure of the format our Spanish classes will be having, due to a still unresolved litigation with the Administration (we are still, as of the time of writing this, awaiting the results of the arbitration that took place in June 2008.) If I do get to doing that, it will be in order to bring back the instructional assistants whose help we used to enlist to cover the fifth credit of our language acquisition places, but that would necessitate the support of the administration which we are unsure of having at this point.

But in any case, the skills that I acquired were extremely helpful, in this time of self-reliance, and I hope to be able to put them in practice in the future.

When I was looking for a good class to take, I had investigated a very big number of classes over the Internet, discovering surprising differences in price (I could not very well judge the quality, but I'm sure there were big differences as well) ranging from $75 to $5,000 for a complete course. I settled on a distance learning class out of Galveston Community College, (I admit to being a bit partial to community colleges) located in Galveston, Texas, class titled "Get Grants!" and taught by Bo Morton and Janet Levine. Their credentials sounded impressive: Bo Morton, initially a director of ESL and Adult Ed. programs, started writing grant proposals out of necessity as the college's budget barely covered half of the cost of the programs. Now she has been, for ten years, a full time Director of Grants Development an Management at a large CC and works on some 40+ proposals a year, generating over $5 million in grants funding. Janet Levine is the Vice President for University Advancement at a public urban institution, has been the Executive Director of the Foundation at the CC where Bo Morton works, has been the Director of Development for a public policy think tank, and has held many more relevant high profile positions.

Together, they developed and taught this particular online class for 8 years now. By my judgement not only did it meet my goals in giving me very in-depth information on the process, it made me realize how intricate, yet necessary those skills are in our new

century society where it seems like the systems that used to fund education on a national level are getting seriously frayed, and the lack needs to be remedied via more and more frequent grant applications.

The class was spread over 6 weeks, sessions being held twice a week (with a certain grace period for completion, and a quiz at the end of each chapter as well as a comprehensive test at the end of the 6 week period) and the syllabus was as follows (each lesson being divided, for clarity's sake, into five chapters):

Lesson	Title	Date
1.	Basic Grant Writing Concepts	4/16
2.	Overview of a Grant Proposal	4/18
3.	Proposal Components: Need Statement	4/23
4.	Goals and Objectives	4/25
5.	Evaluation Plan	4/30
6.	Methods and Activities	5/2
7.	Budget	5/7
8.	Dissemination and Future Funding	5/9
9.	Summary, Preproposal and Query Letter	5/14
10.	Researching Funding Sources	5/16
11.	Putting It All Together	5/21
12.	How To Make Your Proposal a Star	5/23

Final Exam Released:	5/23
Final Exam Due:	6/6

Each lesson was accompanied by a list of relevant, pertinent and useful web sites in lieu of bibliography as well as directories and catalogs of the many governmental and non-governmental agencies that need to be consulted when studying the question of grants.

LESSON ONE

Talks about the preliminary steps needed to take before deciding to compete for a grant. It also talks about the difference between proposal development and proposal writing and the critical factors that make a project or an idea fundable. The students learn what to consider when deciding if an announced grant opportunity is appropriate for their goals and worth pursuing.

To decide whether a project is fundable, it is essential first to determine "who cares" about it (i.e. who the potential funders might be) and the students learn the concept of impact, contribution, replicability and transferability and about the six essential elements that make a project fundable: it needs to solve an existing problem, be of reasonable scope, be relevant to the funding organization's concerns and interests, be well planned, cost effective and deliver measurable results.

The concepts of Request for Proposals (RFP) and Request for Applications (RFA) are discussed as well as how to attain the necessary clarity of format by asking oneself the right questions. Proposal Writing vs. Proposal development is discussed; writing a proposal is a part of the entire process that includes three interrelated components: developing a project, researching potential funding sources and building relationships with those sources where appropriate.

LESSON TWO

Deals with the eight parts of a standard proposal (and suggests to the students to work on one of these parts). They are:
1. A summary, also called the "executive summary" and the "statement of request" is a mini-proposal that defines/describes what the writer wants to accomplish, the need, and why the writer's organization should be considered for funding. It should be between a few paragraphs and two pages long.

2. The introduction talks about the organization and not about the project. It tells the funder who the applying organization is.

3. The need statement is the crux of the matter. It is also called the needs assessment or the problem statement, it tells why the writer is asking for support and what problem is the project going to solve.

4. Goals and objectives tell what the outcomes of the grant will be. Objectives must be specific and measurable. Goals and objectives must not be confused with activities.

5. Methods are where the writer describes the specifics steps that will be undertaken. It explains how the suggested outcomes will be achieved (activities are described here).

6. An evaluation is the plan for determining the degree to which the objectives have been met and the methods followed. This is the "success meter".

7. Future funding needs to be addressed (what will happen after the grant is up. This is where the availability of other resources necessary to implement the grant should be defined.)

8. The budget is the final piece. It explains why the organization needs the level of funding it is requesting, it clearly shows the entire cost of the project, with a distinction between the costs covered by the grant and which will come from other sources. It needs to very clear in itself.

However, the pieces are best not developed in this order, for instance the summary seems to often be developed at the end yet needs to be placed as the first element. The timeliness (how long it typically takes to produce a [roposal and what are the best times to apply) and length of a proposal are also addressed,(which can vary between 3 and

300 pages, depending on whether it is to a federal or to a private funder), and many more other elements are included.

<div align="right">LESSON THREE</div>

NEED STATEMENT: this lesson examines this essential piece (the "why" of the proposal) which is where the funder becomes convinced (or not) of the need. It is crucial to remember that a lack is not necessarily a need to a funder. A need is what ultimately ought to be accomplished with the clients of the organization and the lack is what is not in place to do so. (The problem and the solution must be clearly differentiated.) A need statement must be very clearly documented, as formally as possible. Clear examples are provided.

<div align="right">LESSON FOUR</div>

 GOALS AND OBJECTIVES: the difference is essential. A goal is a broad statement of something the writer is seeking to accomplish, it is the ultimate result of the change undertaken, but it is not measurable or reachable in the short term. Unlike goals, objectives are specific and very measurable. Typically, they have at least three of the following four forms to measurement: time, quantity, quality and money.

Objectives come in several different "flavors" of which two are critical: process and outcome objectives. Process objectives deal with the way to reach goal, they measure how efficient the processes and activities are. For a non-profit, they would quantify some of the key activities or processes the writer will implement to achieve the goal or the stated outcomes. Outcome objectives on the other hand, have to do with the specific amount of change he project will accomplish (examples are provided in the lesson.)

When developing objectives, a number of items need to be considered, namely specifically who or what will change/benefit, whether the objective is achievable, and meaningful.

IN order to accomplish all this, there needs to be a constant checking back with the needs statement, to make sure they continue to be matched. For every need presented in the need statement, there should be a goal that specifies the change this project will accomplish. For every goal there should be at least one specific and measurable objective that will inform the funder of the change this project will produce.

<div align="right">LESSON FIVE</div>

THE EVALUATION: TYPES AND PURPOSES. They, too, come in different flavors. There are process evaluations, concerned with the way the project has been/is being implemented. They also evaluate the relationship of the program activities with the effectiveness of the program. Process evaluations carried out during the project are called formative evaluations.

Another type of evaluation is the outcome evaluation, which looks at the extent to which the program has achieved its stated objectives and tests the degree to which the accomplishment of those objectives can be attributed to the program.

Evaluations that you carry out after the project has been completed are called summative evaluations, they let the writer know how well his/her project did in meeting the overall objectives. They also help tell what part(s) of the project were the most successful and they assess whether others will be able to replicate the project, an essential criterion of success.

This component can be very long and detailed. It needs a constant checking back with the objectives to make sure they are matched and possible revisions.

LESSON SIX

METHODS AND ACTIVITIES: they explain how the writer of the grant is going to reach the objectives set earlier and it must flow from those objectives, just like the evaluation should. The writer will need to describe the precise steps s/he will take to carry out each objective, step by detailed step. This part needs to present a clear picture of what will be done and why. Many federal proposals require an accompanying documentation re. the selection of a particular method/approach. To do that, one would need to carefully review methods and approaches currently used by similar organizations: who will participate in the project, how they will be recruited, what criteria will be used to select the participants and why. The target group described here must be the same as the one identified in the needs section.

Next step is to identify who will provide the service to the target group and who will manage the project. Another reason to be as precise as possible in this piece of the proposal is because it'll need to tie in very closely with the budget and this will help determine it. This is called the project implementation plan and the best way to develop it is a spreadsheet (gulp!) (But a detailed model follows.)

LESSON SEVEN

THE BUDGET: this section, too, requires very detailed and precise numbers, obviously, but it should be facilitated by a careful preparation of the previous section. The direct vs. indirect costs have to be itemized. Typically, direct costs are divided into personnel and non-personnel items. Personnel items will include such things as salaries or wages, consultant fees, and fringe or employee benefits, i.e. the money it takes to pay people to do the work. Non-personnel items include equipment, supplies, travel, printing, etc. Indirect costs, harder to understand, include some of the general organizational services that the project will use, such as the cost of having the payroll prepared, accounting services, general facilities upkeep, etc. (basically, costs that the organization would pay for anyway, but to a lesser extent were it not for the project targeted by the grant.) But they are distinct from administrative costs which are direct costs, also

referred to as overhead.

The concept of cost-sharing defines what the organization will contribute towards the total project costs, in $$ or in-kind. Many federal grants require cost charing and call it a match or matching requirements and the general rule is that the same type of funding cannot be used for the project and for the match, in other terms, one cannot match federal dollars with federal dollars or state dollars with state dollars, but the opposite it allowed.

In government grant proposals, the budget usually consists of two parts, one being a form provided by the funder where specific costs are summarized into a few major categories. This is the Federal Budget Form with a very detailed narrative.

LESSON EIGHT

DISSEMINATION AND FUTURE FUNDING: often overlooked in proposals, they are nevertheless essential as they deal with how replicable your project will be, a piece of big interest to the funder. It should discuss the strategies considered for dissemination (in-person sharing, written documents, media, electronic and others) and levels of dissemination (institutional, community, state, national.)

Future funding focuses on the post-grant future, with different strategies to insure either in-house funding or other forms. This is where the evaluation ties in to determine which strategies will be worth putting forward. Here the difficulty is how to plan and foresee this piece while still at the beginning of the process (fundraising, etc.)

LESSON NINE

SUMMARY: This is a piece that gets included at the beginning of the proposal, yet it is wise to elaborate it at this stage. It is also called abstract, executive summary or proposal summary. It is accompanied by a query letter and pre-proposals. This is not an introduction, rather it is a precis of all the key points necessary to communicate to the reader what the project is and why it is worth being funded (possibly funded above others.) Like a mini-proposal, it needs to answer the questions: what is the project and why is it needed? What will it accomplish and who will it benefit? How will the work be done? How long will it take and who will staff it? What will happen to the project when the grant is over? Financial questions should be addressed briefly as well as benefits and long-term impact.

Before sending in a proposal, permission should be sought with a document called pre-proposal or notice of intent, a brief summary of the project, personnel and budget, using the proposal's template.

Private foundations usually prefer to receive a query letter, just a bit less formal and always in the form of correspondence. The query letter should be signed by the highest ranking person in the organization and sometimes it is preceded by a personal letter.

The question of timing is again addressed here as well as to whom the proposal should be directed.

<div align="right">LESSON TEN</div>

FUNDING SOURCES: GOVERNMENT AND PRIVATE: this chapter presents the biggest funding agencies, governmental such as the Department of education, with its seven offices who have their own grant programs, the National Institute of Health, the National Science Foundation, the Centers for Disease Control, the Child Welfare Services, the Health Resources and Services Administration, the National Endowment for the Humanities, the National Endowment for Arts, and the U.S. Department of State, totaling over 1,400 federal grant programs. It tells about the database and how to access all that information.

The non-profits are divided into public charities and operating foundations, both tax exempt, yet very different. An operating foundation is a non-profit corporation or a charitable trust and its primary purpose is to make grants to unrelated organizations or institutions or to individuals for scientific, educational, cultural, religious or other charitable purposes. Operating foundations can be either private or public, differing only in the way their assets have been received. (The fact that a public charity may use the word "foundation" does not make it an operating foundation.)

Corporate funding is a relatively small percentage of charitable giving. Many companies seems to give through separate, limited programs.

This information is substantiated by a whole array of directories and "tricks of the trade", federal guidelines being by far the toughest to understand and follow and the most daunting.

<div align="right">LESSON ELEVEN</div>

PUTTING IT ALL TOGETHER: this lesson deals with assembling, packaging and putting the proposal in the mail in an adequate and timely manner along with all the supporting data (appendices, etc.) It also suggest the appropriate follow up for both federal and private funders.

<div align="right">LESSON TWELVE</div>

HOW TO MAKE YOUR PROPOSAL A STAR: this lesson deals with elements like style, what to include and what to avoid ("the seven deadly sins of grant writing".) Being clear, concise and compelling is a must. Passion, persuasion and precision are strongly suggested. Finally some ethical issues are addressed.

While this outstanding online class to some extent demystified for me the topic of grant writing, it also taught me that it is infinitely harder and more complex that I imagined and that it is truly a full time job. It requires an immense expertise in many areas as different

as budgeting and knowledge of social and educational tickings, and should be teamwork by all means. If I ever do get a chance to apply what I have learned in this class I sincerely hope that it will not be without the wholehearted support of my team, from the immediate to the top, as it should be, the class suggests, for a full success.

On a lighter side, it was my and my husband's personal decision to spend those three months in Guanajuato, Mexico, and that added a very colorful and valuable cultural component to my sabbatical experience, and I am sure I will be able to use this unexpected bonus in my professional endeavors. Thank you.