

Project Planning: Proposal Development & Organizing Your Team

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Overview

- About GNA
 - GNA's Grant Experience
- GNA's Grant Writing Process
- Keys to Grant Writing Success
 - Picking the right project
 - Managing partnerships and approvals
 - Writing and submission
- Organizing Your Team
- Big Picture



Who is GNA?

- Environmental consulting firm
- Offices in Santa Monica and New York City
- 17 years of experience
- Diverse staff of 25
 - Technical
 - Grant Funding Programs
 - Policy & Regulatory
 - Events & Marketing
 - Outreach & Stakeholder Relations
 - Strategic Market Analysis



GNA Grant Experience

- Over \$220M on behalf of clients and clean energy and transportation projects
- 95% success rate
- Expertise on “both sides” of the grant funding process
 - Advise, develop and implement public grant and regulatory programs related to funding
 - Secure funding for a range of fleets (public and private), equipment manufacturers, and energy projects



Recent Grant Success Stories

- **ARRA Clean Cities Funding**
 - 11 GNA and GNA-assisted applications received funding (~\$133M / \$300M)
 - 4 GNA applications (~\$53M, 18% of total)
 - 860 LNG, CNG, HEV, HHV trucks + 15 natural gas stations
- **CEC AB 118 Funding**
 - \$9.3M for SANBAG ARRA Cost-Share
 - \$11M for Biomethane production
 - \$1M for LNG/LCNG station development projects, including biogas-sourced fueling stations
- **Leveraged Funding**
 - \$16M for California Cartage Company from 5 funding sources: 132 trucks, 2 LNG stations



GNA's Grant Writing Process



GNA's Grant Writing Process

- Read the RFP
- Read the RFP again
- Read the Q&A
- Read the Q&A again
- Brainstorm possible project partners, challenges, and viability
 - Fleets
 - Public Agencies
 - Technology Providers
- Do quick analysis to determine eligibility and competitiveness
 - Confirm applicant eligibility
 - Petroleum/Emissions benefit
 - Cost-effectiveness



GNA's Grant Writing Process, Con't

- Bring project partners together and secure commitments
- Read RFP and all supporting documents again
- Develop list of every document and piece of required paperwork for proposal submission
- Assign sections of proposal to GNA team
- Provide partners with list of application needs from their end
- Weekly grant check-in meetings
- Compile draft in appropriate format
- Two rounds of edits
- Submission 24 hours before deadline



Breaking Down Proposal Needs

Task	Format/File Name	Description
Grant Application Form	Adobe Form/DE-PS26-09NT01236-04	Master Document
Application for Federal Assistance - SF 424	Adobe Form	This is part of the Adobe Form under mandatory documents
Commitment Letters	PDF/CLPT.pdf	Commitment Letters are required for each project partner and are attached to the SF-424 in the Adobe Form
List of Congressional Districts	Excel/Congressional Districts for Clean Cities Proposal	The SF-424 requires CDs of the applicant and project to be listed, but only provide room for one CD to be listed. Projects are likely to require a list to be attached in item 16 of the
Project/Performance Site Locations	Adobe Form	This is part of the Adobe Form under mandatory documents
SF 424A File - Budget Information for Non-Construction Programs	Excel/SF424A.xls	This is the budget form for vehicles which is attached under "Other Attachments Form"
SF 424C File - Assurances, Non-Construction Programs	Excel/SF424C.xls	This is the budget form for infrastructure which is attached under "Other Attachments Form"
SF-LLL Disclosure of Lobbying Activities, if applicable	Adobe Form	This is part of the Adobe Form under optional documents



Specialized Approach

- One project manager per proposal
 - Weekly or bi-weekly meetings to identify bottlenecks and problems to therefore identify solutions
- Each staffperson took ownership of at least one of the following areas, across all proposals:
 - SF424
 - SF424a
 - Emissions
 - Petroleum Reduction Calculations
 - Merit Review Criteria
 - Technical review editing
 - Grammar/flow/does this make sense editing



Example Approach: Jobs

- GNA submitted 11 applications/partial applications
- One person at GNA had responsibility for ALL 11 of the jobs calculations and narratives
 - More efficient approach than making one person responsible for entire SANBAG/SCAG LNG truck application
 - Even if the specifics across the 11 applications were different, the process was the same
- One admin/junior staffperson supported jobs research needs (% unemployment by sector).



Keys to Grant Writing Success



Keys to Grant Writing Success

- Filling out forms doesn't win grants
- Understand selection criteria
 - Tailor your application to match
- Prescreen applications for viability
- Only pursue eligible projects
- Understand the funding agencies
 - Programmatically and personally
- Understand your stakeholders' needs
 - Economically and operationally
- Sell how the project will be easy to administer and make the funding agency, your agency, and stakeholders shine in the public's eye
- Develop long-term partnerships with fleets and vendors to ensure success when opportunity arises
- Be ready **before** grant opportunities arise



Right Grant, Right Project

- Review eligibility
 - Selection criteria
 - Applicant eligibility
 - Regulatory limitations
- Review programmatic priorities
 - Application
 - Agency
- Assess how each stakeholder can strengthen or weaken your application



Example: Wrong Grant, Wrong Project

- Grant: EPA NCDC ARRA Funding
- Client: Daimler Trucks North America
- Project Interest: new truck sales
- Opportunity: 25% of new truck cost
- Issues:
 - Cost-effectiveness against retrofits, repowers, idle reduction technologies.
 - Regional priorities, regulations
- Takeaway: **Keep your eye on the prize. Knowing the grant and knowing your goals is critical.** It's hard to turn down a grant, especially when your competitors seem to be pursuing it but be realistic about your competitiveness.



Managing Upfront Approvals Challenges

- An interested project partner is not the same as a secured project partner.
 - Need approvals at all levels of management
 - Need to “sell” private partners in ways that matter to them
- Sales Pitch:
 - grant \$\$\$, ROI, get ahead of regulations, PR
 - How will this make your boss/company look great?
- Don't Gloss Over the Challenges:
 - There is no such thing as free money.
 - Timeframes: grants change the way things are done.
 - Terms and Conditions: review dealkillers upfront



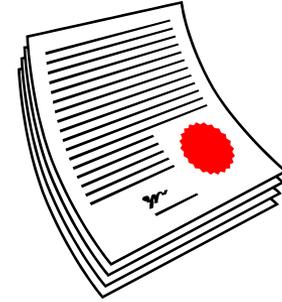
Example: Aramark Uniform Services

- Grant: DOE Clean Cities ARRA
- Applicant: Maryland Energy Administration
- Fleet  **ARAMARK**
- Project: 50 Hybrid Delivery Truck Deployment
- Issues: Short Timeframe, Corporate approval (international, legal), available capital
- Takeaway: Approvals take a lot of handholding and a lot of explanations, all the way up the chain



Paperwork

- Paperwork doesn't win grants, but it certainly *loses* grants.
- Quotes
- Other budget information (cost share, payroll, personnel hours, subcontractor info)
- Anything that requires a signature
- Site plans/permit information
- Letters of commitment / letters of support
- Any information from outside subcontractors or project partners



Beating Your Competition

- Cost-Effectiveness
- Write to the selection criteria and project objectives
 - Never leave a question unanswered.
 - Show how every answer ties back to Objectives
- Meet the agency's stated (and unstated) programmatic priorities
- Show how your project is unique and will bring the agency great PR



Example: Maryland Hybrid Truck Goods Movement Initiative

- Grant: DOE Clean Cities ARRA
- Applicant: Maryland Energy Administration
- Fleets: UPS, Nestle, Aramark, Sysco, Efficiency
- Project: 150 Hybrid Goods Movement Truck Deployment
- Issues: How to make this project more marketable and unique than any other multi-truck project
- Takeaway: Develop your team and application specifics with an eye on the agency's needs



Anticipate Problems Upfront

- **It always takes longer than you think it will**
- Set strict internal deadlines
- Request paperwork and budget needs upfront
- Account for long contracting and deployment timelines
- Know your submission requirements and how to navigate the systems
 - Grants.gov
 - Mail
 - In-Person
- Have an electronic submittal expert, and start several days ahead of time



Example: Grants.gov submittal



- Grant: DOE Clean Cities ARRA AOI4
- Client: Multiple
- Issues: Submittal system not intuitive, system overload created system slowdown and panic, hotlines down after work hours
- Solution: GNA had submitted to Clean Cities AOI3 the pervious month and had worked through submission process ahead of time
- Takeaway: Your real deadline is at least 24 hours before you need to submit/mail/etc



Organizing Your Team



Create Your Own Opportunities

- If you start making plans when the grant is released, it's almost too late
- Relationships Matter
 - Public agencies
 - OEMs
 - Fleets
 - Utilities
 - Infrastructure Developers
 - Fuel Providers
 - Grant writers
- Make proactive pitches



Building Relationships and Projects Now

- Regulations
- Reliable Fleets and Partners with “Brand-name” Recognition
- Project theme/coherence that addresses local priorities
- Keep it Simple



Building Relationships, Con't

- Understand your stakeholders' priorities
 - How will this project benefit their bottom line
- Respect stakeholders' limited time
 - Their first priority is everyday business operations
 - Work with their workflow. Ask about the best times and methods to contact them
 - Respect their inbox. Keep communications short and concise



Ask for Help

- These grants are not a one-person endeavor. You need a team
- Make sure you have appropriate support
 - Management needs to understand the grant is your first priority
 - Appropriate staff support
 - External grant writing support, as needed and available



Big Picture



Keep Focused on the Big Picture

- It's not about winning a grant proposal: it's about successfully implementing a winning proposal
- Don't oversell the benefits of the grant
- Don't undersell the hurdles
 - Timeframes
 - Federalization
- Use the lessons from the last round to build stronger coalitions and projects in the next round



Do What You Need to Stay Focused



Keep Your Eye on the Prize



Thank You



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