



# Essential Techniques for Grant Writing Success

## Grants Management Services

June 25, 2025

**forv/s**  
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# Presenters



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Forvis Mazars presenters are not providing legal advice. This presentation is meant to be an overview of grant writing techniques & should not be taken as legal guidance from Forvis Mazars.

# Essential Techniques for Grant Writing Success

## Agenda



Understanding the Grant Landscape



Grant Portfolio and Annual Grant Strategy



Applying for Grants



Tips and Tricks for Grant Writing

# 1

## Understanding the Current Grant Landscape

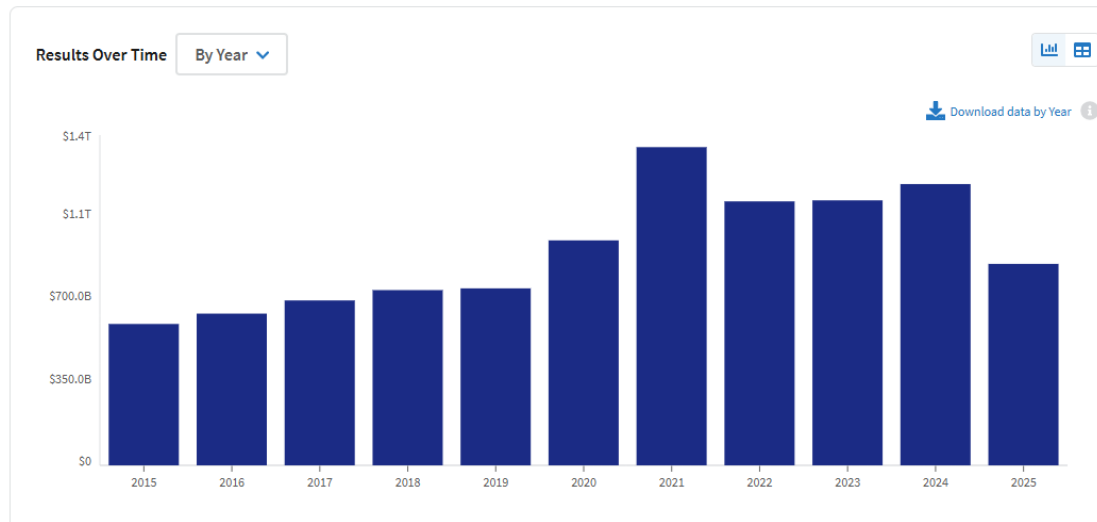




# Understanding the Current Grant Landscape

## What's Changed in 2025?

### Federal Grant Spending By Fiscal Year

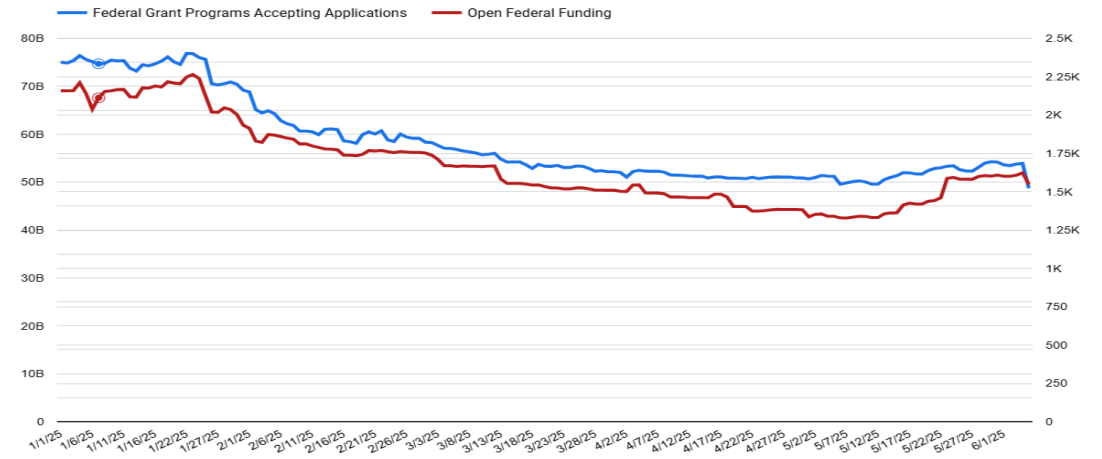


Source - USAspending.gov - U.S. Department of the Treasury, Accessed 6 June 2025.  
<https://www.usaspending.gov/search-> As of June 5, 2025

- Major Federal Budget Cuts and Service Interruptions
- Changes in Policy and Shifting Funding Priorities
- Indirect Cost Caps and Constraints on Margins and Budgets
- Heightened Focus on Performance Metric
- Increased Oversight and Audit Scrutiny

### U.S. Federal Grant Market Trends: 1.1.2025 to Present

Jun 5, 2025



Source - Federal Grants Dashboard: Grant Exec – As of June 5, 2025



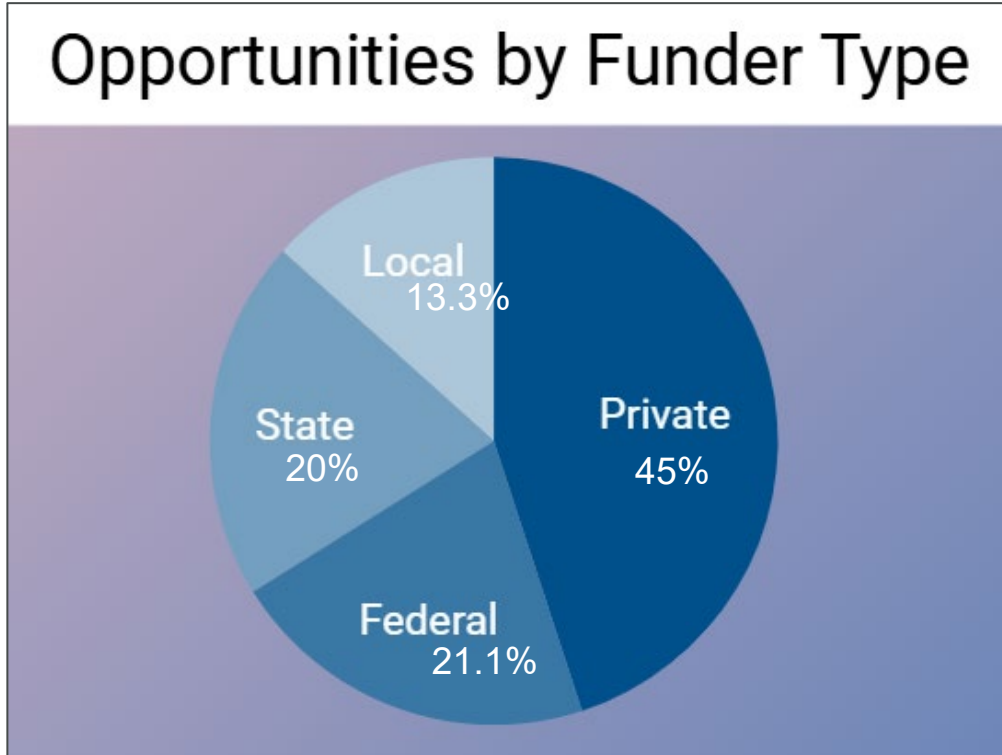
Understanding the Impact of  
Federal Freeze on Grant  
Funding

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# Understanding the Current Grant Landscape

## Opportunities Amid Uncertainty



Source - [Federal Grants Dashboard: Grant Exec](#) – As of June 5, 2025

- Return on Investment (ROI) Driven Proposals
- Segment Programs Based on Funding Priorities
- Focus Funding on Activities Driving the Best Outcomes
- Diversify Funding
- Highlight Cost Efficiency and Mission Alignment
- Collaborate to Build Stronger Partnerships

# 2

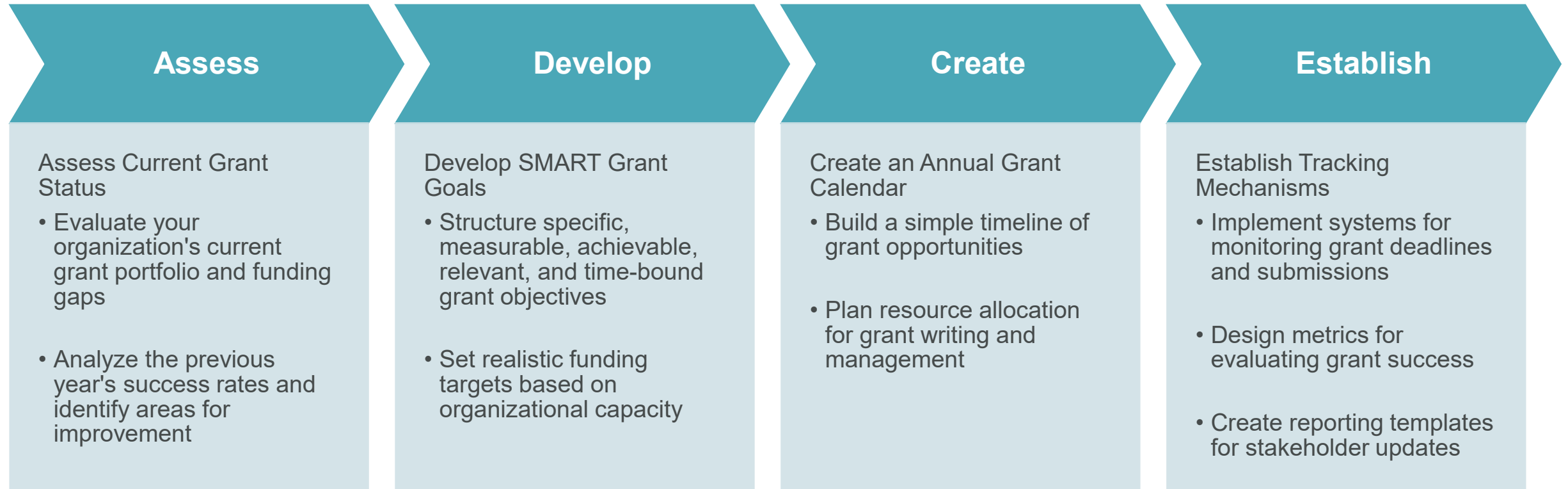
## Grant Portfolio & Annual Grant Strategy





# Grant Portfolio & Annual Grant Strategy

## Setting Your Grant Goals for the Year



# Grant Portfolio & Annual Grant Strategy

## Components of a Strong Grant Portfolio



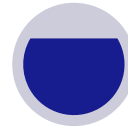
### Grant Type Diversity

- What percentage of organizational grant funding comes from each grant type (federal, state, local, foundation, corporation)?
- What percentage of organizational grant funding comes from old and new grants?



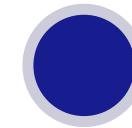
### Funder Alignment

- Does our proposal and mission align with funder's strategic priorities?
- Do we understand the funder's decision-making processes and language?



### Lifecycle management

- Are we balancing new opportunities with renewals and long-term grants?
- What is our stewardship process?



### Risk Assessment

- Are we over-relying on grants to fund core operations?
- What is our contingency plan if we lose a major grant?
- Do we have reserves or flexible funding to buffer against unexpected changes?

# Grant Portfolio & Annual Grant Strategy

## Mapping Out Your Annual Grants Calendar

Grant Name	Funding Organization	Primary Contact at the Funding Organization	Funding Purpose
Letter of Intent (LOI) and/or Application Deadline	Internal Deadlines	Link to Grant Page/ Submission Method	Amount You Plan to Request
Project Status	Grant writing/ Application Development Owner	Notes	



# Grant Portfolio & Annual Grant Strategy

## Mapping Out Your Annual Grants Calendar

### Tools to build Grant calendars

- Free grant calendar templates
- Spreadsheet based tools
- Project or grants management software platforms

GRANT INFORMATION				STATUS				IMPLEMENTATION				REPORTING					CLOSEOUT
FUNDING ORGANIZATION	PURPOSE OF GRANT	OPPORTUNITY / FUNDER NOTES	AMOUNT REQUESTED	APPLICATION SUBMITTED	ACCEPTED / REJECTED	AMOUNT RECEIVED	NEXT STEPS	DELIVERABLE DEADLINE 1	DELIVERABLE DEADLINE 2	DELIVERABLE DEADLINE 3	DELIVERABLE DEADLINE 4	INTERIM REPO DEADLINE 1	INTERIM REPO DEADLINE 2	INTERIM REPO DEADLINE 3	INTERIM REPO DEADLINE 4	FINAL REPORT DEADLINE	DEADLINE

# Grant Portfolio & Annual Grant Strategy

## Annual Grant Strategic Planning



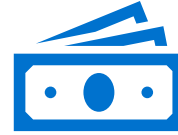
### Q1: Foundation Research & Relationship Building

- Research potential funders
- Attend funder presentations and networking events
- Update grant tracking database
- Conduct post-award evaluation of previous grants



### Q2: Proposal Development & Submission

- Submit major foundation proposals
- Develop core program descriptions and budgets
- Create multimedia materials and case studies
- Begin government grant research



### Q3: Government & Corporate Grant Focus

- Submit federal and state applications
- Pursue corporate partnership grants
- Mid-year strategy assessment



### Q4: Stewardship & Planning

- Submit reports on current grants
- Plan next year's strategy
- Cultivate funder relationships
- Prepare annual sustainability plan



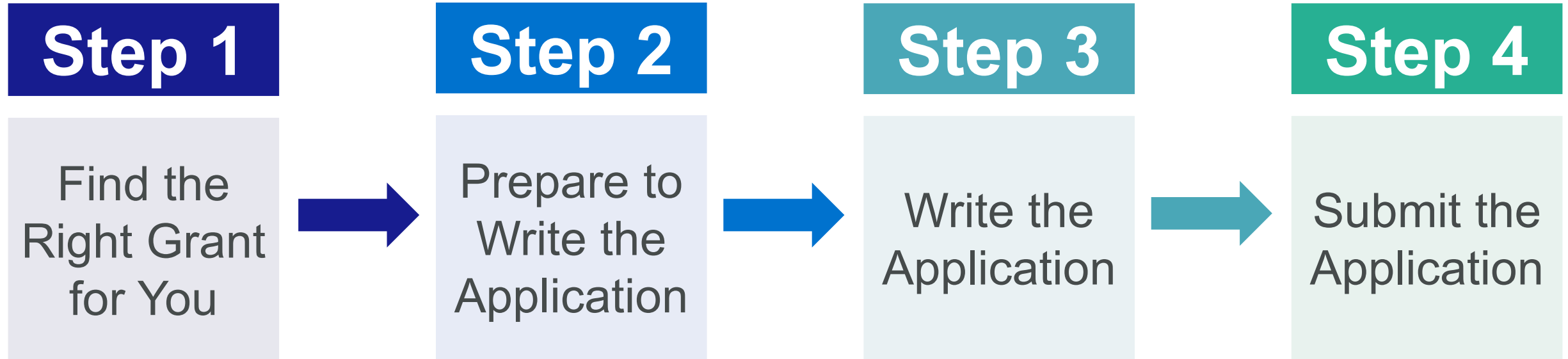
# 3

## Applying for Grants



# Applying for Grants

## The Four Big Steps



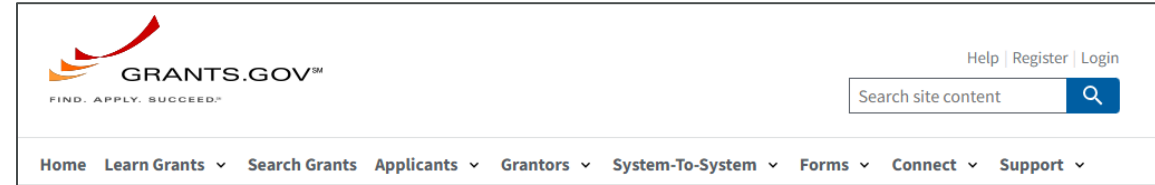
# Applying for Grants

## Step 1: Finding the Right Grant for You

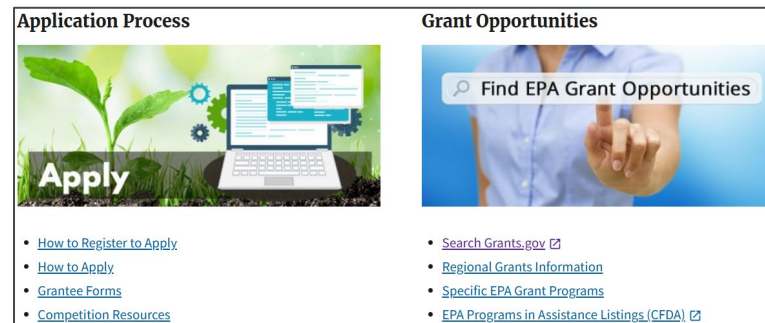
### Federal Grants

- [Grants.gov](https://www.grants.gov) is an excellent place to find federal grants and other forms of federal financial assistance
- Agency websites are a great place to find federal grants
  - [Environmental Protection Agency](#)
  - [Health and Human Services](#)
  - [United States Department of Agriculture](#)
  - [United States Department of Justice](#)

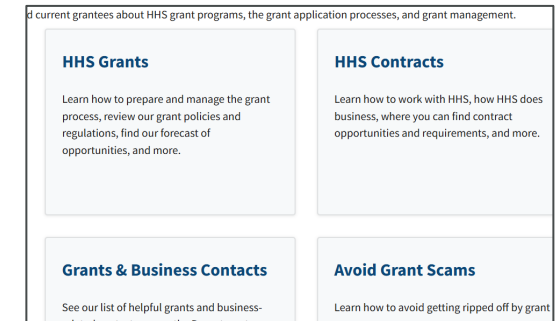
### Grant.gov



### EPA Grants Page



### HHS Grants Page



# Applying for Grants

## Step 1: Finding the Right Grant for You

### State Grants & Local Grants

#### State Grants

- Search Grants.gov and state agency websites
  - Economic development agencies
  - Educational agencies
  - Housing agencies
  - Health agencies

#### Local Grants

- Can be offered through local governments, private foundations, and organizations
- Where to look?
  - Local Grants – Local government websites
  - Private Grants – Individual foundations and organizations

# Applying for Grants

## Step 1: Finding the Right Grant for You

### Selecting the Grant

- Submitting a strong grant application can be a lengthy process
  - It is better to find one grant that aligns well with your project/program and create one very strong application
  - Applying for several grants, if not aligned with your goals, might not be a good use of your time



# Case Study

## Step 1: Finding the Right Grant for You

A small business is looking for a grant to help fund the addition of solar panels to their facility to increase their energy efficiency. They also anticipate the solar panels will offset the cost of the electricity and reduce their need to draw from the local power grid.

### Grant Option 1

**Purpose:** Provide funding for communities and organizations to invest in green energy infrastructure

### Grant Option 2

**Purpose:** Provide funding to small businesses to update their facilities to be more energy efficient, particularly as it relates to green energy infrastructure

### Grant Option 3

**Purpose:** Provide funding to organizations to update their facilities and operational practices to reduce the output of greenhouse gas emissions

# Case Study

## Step 1: Finding the Right Grant for You

A small business is looking for a grant to help fund the addition of solar panels to their facility to increase their energy efficiency. They also anticipate the solar panels will offset the cost of the electricity and reduce their need to draw from the local power grid.

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### Grant Option 3

**Purpose:** Provide funding to organization to update their facilities and operational practices to reduce the output of greenhouse gas emissions.

# Applying for Grants

## Step 2: Preparing to Write the Application

### The Notice of Funding Opportunity

- Read the grant notice, often called a Notice of Funding Opportunity (NOFO), in detail
- Leverage technology tools to help you summarize the NOFO and pull-out key details and requirements
- Disclaimer: Technology tools should not replace the need for manual review and human judgment

## Case Study

Grant: Rural Energy for America (REAP)

### NOFO Summary

- Application Deadlines
- Eligibility Requirements
- Areas of Focus
- Application Requirements
- Budget Requirements
- Attachments
- Evaluation Criteria
- Links/Resources to Aid in Completing the Application

# Applying for Grants

## Step 2: Prepare to Write the Application

- Checklist Tools:
  - Compliance
  - Project Management

### Case Study

Grant: Rural Energy for America (REAP)

Grant Application Compliance Matrix				
Grant Title:	REAP	Maximum Funding Request:	\$1,000,000.00	
Application Due Date:	XX-XX-XXXX	Amount of Funding to Request:	\$750,000.00	
Supplemental List of Items Needed				
Section of the Application	Item Needed	Page Limit	Completed (Y/N)	Notes
Executive Summary	Entire thing	1	N	Complete last
Organization Information	Name, Address, Phone Number	<1 Page	Y	
	Organizational History and Structure	1	Y	
	Previous Experience	1	Y	
Project Narrative	Specific Goals and Objectives	1	N	
	Timeline	1	N	
	Evaluation Methods	1	N	Add evaluation of power grid energy
	Key Personnel	1	Y	
Budget	Budget Form	1 - Template	Y	
	Written Justification	1	N	
Attachments	Financial Statements	N/A	Y	
	Letters of Support	2	N	Request from Bob Smith

# Applying for Grants

## Step 2: Prepare to Write the Application

- Checklist Tools:
  - Compliance
  - Project Management

## Case Study

Grant: Rural Energy for America (REAP)

Document Requested	WBS	Responsible	Received?	Status
Resumes - Stakeholder 1	2.6.2	Stakeholder 1	TRUE	In Review
Subrecipient Budget Justification - Stakeholder	2.9.1	Stakeholder 1	TRUE	In Review
Instructions and Summary	2.9.1.1	Stakeholder 1	TRUE	In Review
a. Personnel	2.9.1.2	Stakeholder 1	TRUE	In Review
b. Fringe	2.9.1.3	Stakeholder 1	TRUE	In Review
c. Travel	2.9.1.4	Stakeholder 1	TRUE	In Review
f. Contractual	2.9.1.7	Stakeholder 1	TRUE	In Review
Technical Volume	2.5	Your Organization		In Review
Cover Page	2.5.1	Your Organization	TRUE	In Review
Project Overview	2.5.2	Your Organization	TRUE	In Review
Resumes - Your Organization	2.6.1	Your Organization	TRUE	In Review
Prime Budget Justification Workbook - Your Organization	2.8.1	Your Organization	TRUE	Backlog
f. Contractual	2.8.1.7	Your Organization	TRUE	In Review
j. Cost Share	2.8.1.11	Your Organization	TRUE	In Review
Summary of Project for Public Release	2.10.1	Your Organization		Backlog
Completion of Summary Slides	2.11.1	Your Organization		Backlog



# Applying for Grants

## Step 3: Writing the Application

### Common Parts of a Grant Application

**Executive  
Summary**

**Organization  
Information**

**Statement  
of Need**

**Project  
Narrative**

**Sustainability  
Plan**

**Budget &  
Justification**

**Supporting  
Materials**

# Applying for Grants

## Step 3: Writing the Application

### The Executive Summary

- A concise, yet compelling, overview of the project, goals, methods, and expected outcomes
- Typically one page or less

## Case Study

Grant: Rural Energy for America (REAP)

### Executive Summary Sections



### Example Section

#### Objectives:

- 1. Energy Independence:** Achieve 100% offset through solar energy generation
- 2. Financial Impact:** Significantly reduce operational costs associated with electricity consumption. Reinvest savings back into the business
- 3. Environmental Impact:** Decrease carbon footprint by reducing reliance on non-renewable energy sources
- 4. Community Support:** Contribute to the local energy grid by selling excess energy, enhancing energy stability and availability

# Applying for Grants

## Step 3: Writing the Application

### Organizational Information

- Demonstrates capacity to successfully manage the project
- Typically 1–2 pages

## Case Study

Grant: Rural Energy for America (REAP)

### Organizational Information Requirements

Type of Applicant	Applicant Description
Financial Information Financial Statements: Previous, Current, and Proforma	Certifications Legal Status, Available Equipment, Compliance with Laws and Regulations
Previous Grant and Loan Experience	Sam.gov Registration

### Example Section

**Applicant Description:** ABC Manufacturing is a small family-owned business located in Anywhere, a small town in Missouri. We have been in operation for over 25 years and have a mission to produce metal products crafted with care, quality, and excellence. Our business 100% family owned and operated by the by the Doe family. The company employs 25 dedicated staff members who contribute to our success and growth. We maintain full ownership and control of the business, facility, and land on which the facility is located.

# Applying for Grants

## Step 3: Writing the Application

### Statement of Need

- Define the need/problem
- Detail how program/project meets such need

This is an opportunity to connect your identified need to awarding agencies strategic funding objectives.

## Case Study

### Grant: Rural Energy for America (REAP)

REAP Funding Priorities	Alignment With Case Study
Promote Renewable Energy	Adding a renewable energy source: Solar
Enhance Energy Efficiency	Reduce reliance on non-renewable energy
Economic Development	Financial savings put back into business = growth and potentially creating new jobs
Environmental Sustainability	Reduce reliance on non-renewable energy = Decrease carbon footprint
Energy Independence	100% energy generation by solar = energy independence
Community Resilience	Selling excess energy to the grid = enhancing energy stability and availability within the community

# Applying for Grants

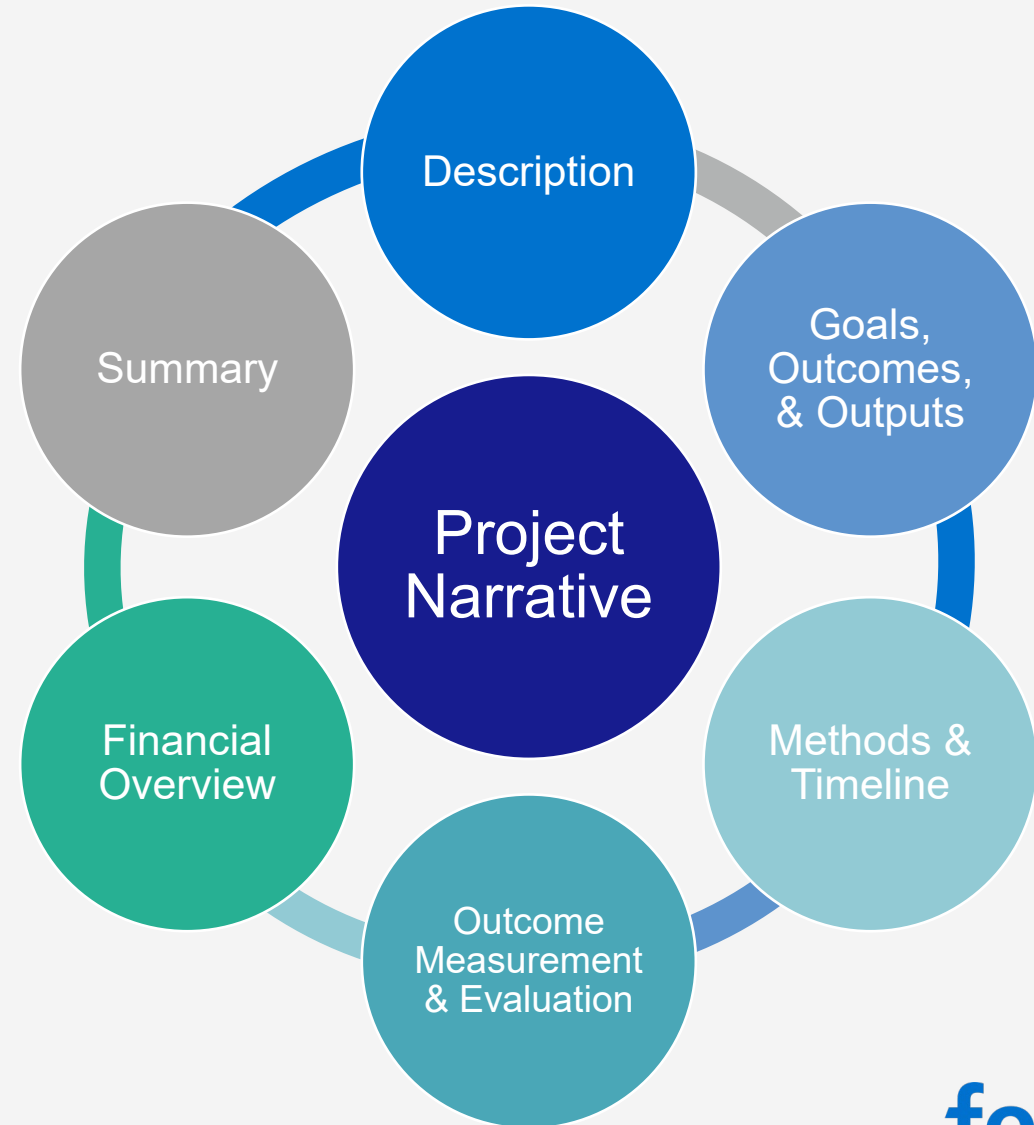
## Step 3: Writing the Application

### Project Narrative

- Details of the project, how it will be carried out, and what the anticipated outcomes are
- The longest portion of the application

## Case Study

Grant: Rural Energy for America (REAP)





# Applying for Grants

## Step 3: Writing the Application

### Budget & Justification

- Budget – Cost Breakdown
- Budget Justification – Cost Explanation

## Case Study

### Grant: Rural Energy for America (REAP)

BUDGET INFORMATION - Construction Programs				OMB Approval No. 0348-004
NOTE: Certain Federal assistance programs require additional computations to arrive at the Federal share of project costs eligible for participation. If such is the case, you will be notified.				
COST CLASSIFICATION	a. Total Cost	b. Costs Not Allowable for Participation	c. Total Allowable Costs (Columns a-b)	
1. Administrative and legal expenses	\$ .00	\$ .00	\$ .00	
2. Land, structures, rights-of-way, appraisals, etc.	\$ .00	\$ .00	\$ .00	
3. Relocation expenses and payments	\$ .00	\$ .00	\$ .00	

Budget Category	Amount	Justification Sample
Project Management	\$25,000.00	Salary at 30% allocation for 8 months for resident project manager
Engineering/Architecture	\$75,000.00	Works with construction team and manufacturer to create plants that meet the needs of the building and business
Construction	\$250,000.00	Completes the worked related to facility preparation and installation of the solar panels
Equipment	\$400,000.00	Cost of the solar panels based on market research and other supplies needed to get panels up and running

# Applying for Grants

## Step 3: Writing the Application

### Sustainability Plan

- Explains:
  - Long-term impacts of the award
  - How the project will continue post award
- Can be included in other sections depending on the NOFO

## Case Study

### Grant: Rural Energy for America (REAP)

#### Elements of the Application/Grant that Address Sustainability:

##### Prior Application Sections

- Pro Forma Financial Statements & Outcomes and Evaluation Methods

##### Technical Report

- Demonstrates commitment to long-term sustainability and reliability of the system
- Includes details on how system will be operated and maintained over its useful life

##### Feasibility Study – Optional/Recommended

- Helps Agency assess likeliness of the project to succeed after the grant
- Summarizes the long-term viability of the project

##### Annual Performance Reporting

- Creates accountability to make sure the project delivers as expected, and benefits are tracked real time
- Three years of reporting required

# Applying for Grants

## Step 3: Writing the Application

### Supporting Materials

- Documents that can reinforce both your organizations and applications, credibility, capacity, and community support
- Examples:
  - Letters of Support
  - Resumes or Bios of Key Personnel
  - Organizational Chart
  - Financial Statements or Audit Reports
  - Entity Setup Documents: 501(c)3 letter, SAM.gov registration, etc.

# Applying for Grants

## Step 3: Writing the Application

### Review

- A final quality review prior to submission
- Review encompasses:
  - Checking for answers to required questions
  - Checking for general readability and grammar
  - Reviewing NOFO evaluation criteria for preliminary anticipated scoring

Best practice is to have someone that is not deeply involved in the writing process provide the review.

# Applying for Grants

## Step 4: Application Submission

- Submit applications early
- Only submit the application when:
  - Required questions/prompts have been answered
  - Required exhibits/attachments have been gathered and uploaded
  - Any reviews have been completed

It is better to take the time to double and triple check your application than it is to submit an incomplete or poor application. Plan Accordingly!

# 5

## Tips & Tricks for Grant Writing



# Tips & Tricks

## Grant Preparation Toolbox





# Tips & Tricks

## Key Insights



Answer clearly & concisely



Use NOFO language and buzz words



Avoid redundancies



Emphasize outcomes & evaluation



Alignment with funder's priorities

# Tips & Tricks

## Success Tactics



**48 hours**



**3–5**  
Reviewers



**90 seconds**



**The**  
"Parking  
Lot" Method



**Reviewer**  
Psychology



**The "So**  
What?" Test

# Essential Techniques for Grant Writing Success

## Final Thoughts

“Grants are not just financial assistance; they are a catalyst that transforms dreams into reality.”  
— Anonymous

“There’s no shortage of grant funding—only a shift in how and where to win it. The real challenge isn’t a lack of opportunities—it’s keeping track of them.”  
— Kristin Alcorn

“Receiving a grant is not just about the money; it is about the validation and belief in your vision.”  
— Robert Johnson



# Thank you!

## Contact Information

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