

Better Grant Applications ... straightaway.



Presented in conjunction with:

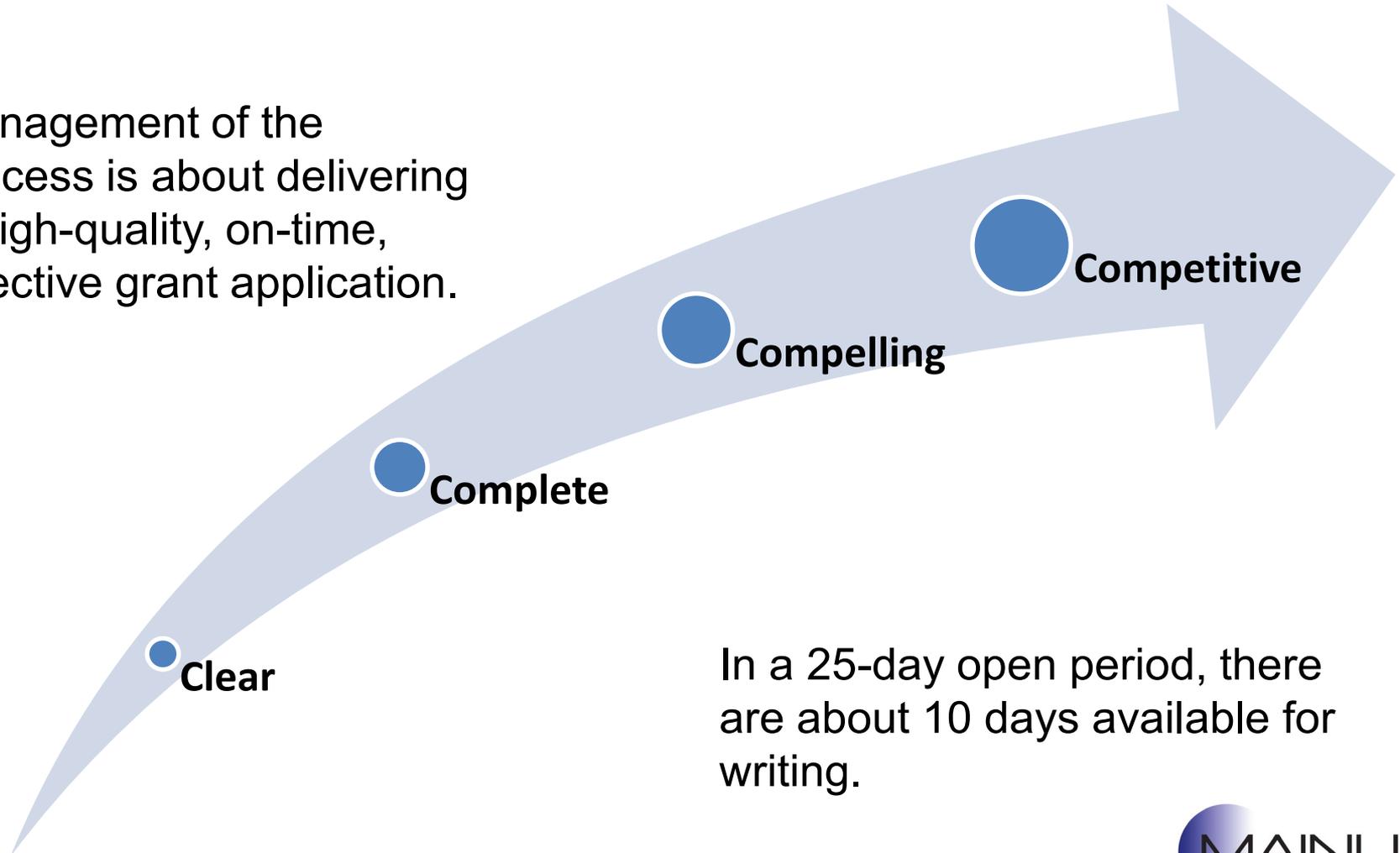


Introductions



Characteristics of a successful grant application

Management of the process is about delivering a high-quality, on-time, effective grant application.

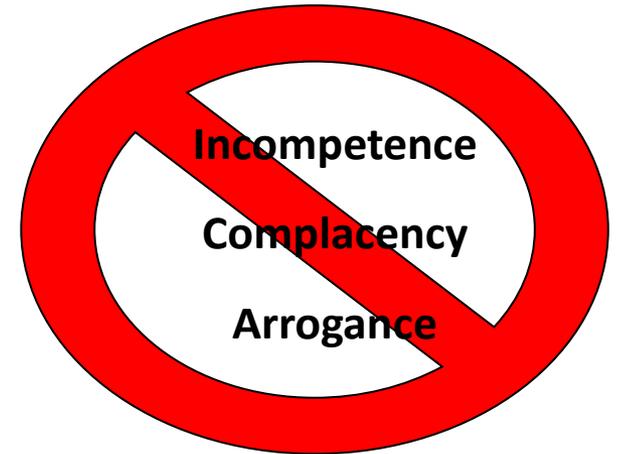


In a 25-day open period, there are about 10 days available for writing.

Characteristics of a successful grant application

Winning applications (also called “bids”) are based on:

- Understanding the grant process
- Recognising stakeholders
- Good market knowledge
- Customer empathy
- Knowing your SWOT
- Considered writing



The purpose of your bid: to sell

- Providing information to help the evaluation team
- Clearly articulating the value proposition to support decision making

Understanding the grant process

Building Better Regions Fund – Community Investment Stream:

- Eligibility
 - a local governing body as defined by the Local Government (Financial Assistance) Act 1995
 - a not for profit organisation
 - demonstration that co-funding requirements are met.
- Eligible projects
 - local events and activities
 - strategic planning
 - regional leadership and capability

Understanding the grant process

Building Better Regions Fund – Community Investment Stream:

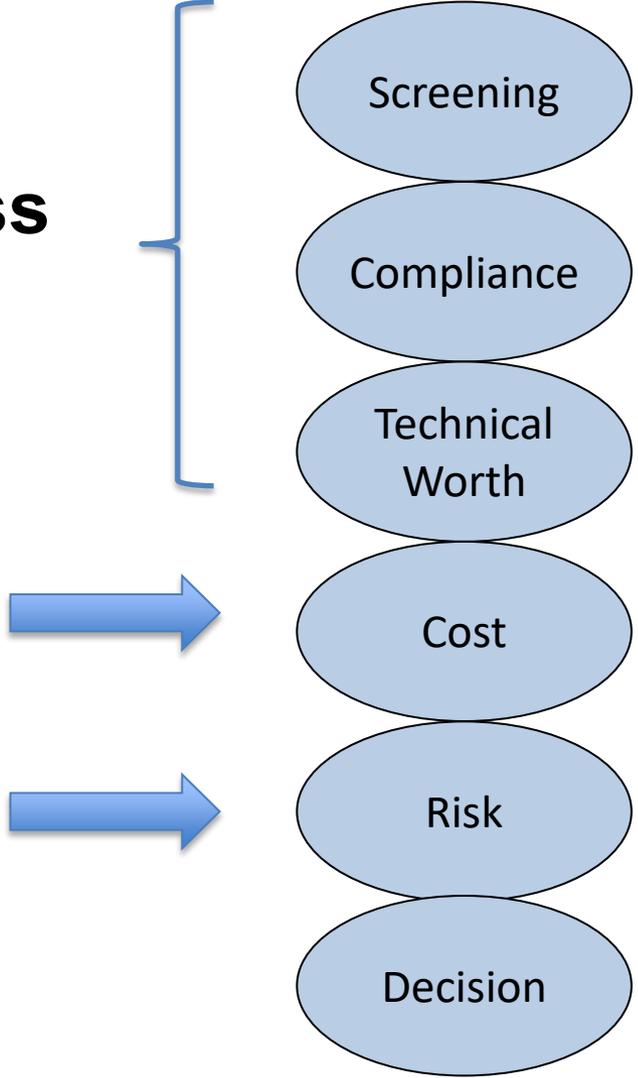
- “we will assess applications against eligibility and merit criteria and compare them to other applications in a funding round”
- “The program has been designed to achieve the following outcomes...”
 - create jobs
 - have a positive impact on economic activity, including Indigenous economic participation through employment and supplier-use outcomes
 - enhance community facilities
 - enhance leadership capacity
 - encourage community cohesion and sense of identity.
- Evaluation/Merit Criteria
 - Economic benefit
 - Social benefit
 - Value for money
 - Project delivery.

Value for money

- **Technical effectiveness**
 - Eligibility Criteria
 - Merit Criteria

- **Cost**

- **Acceptable risk**



What influences the grant process?

The grant context

- Ministerial discretion
- Government jurisdiction
- Probity and ethics

- Ministerial Panel
- National Infrastructure Committee of Cabinet

How is the process influenced?

Politics

Policy

Attitudes

Legislation

Process

Ignorance

Regulation

Procedures

Corruption

Who influences the grant process?

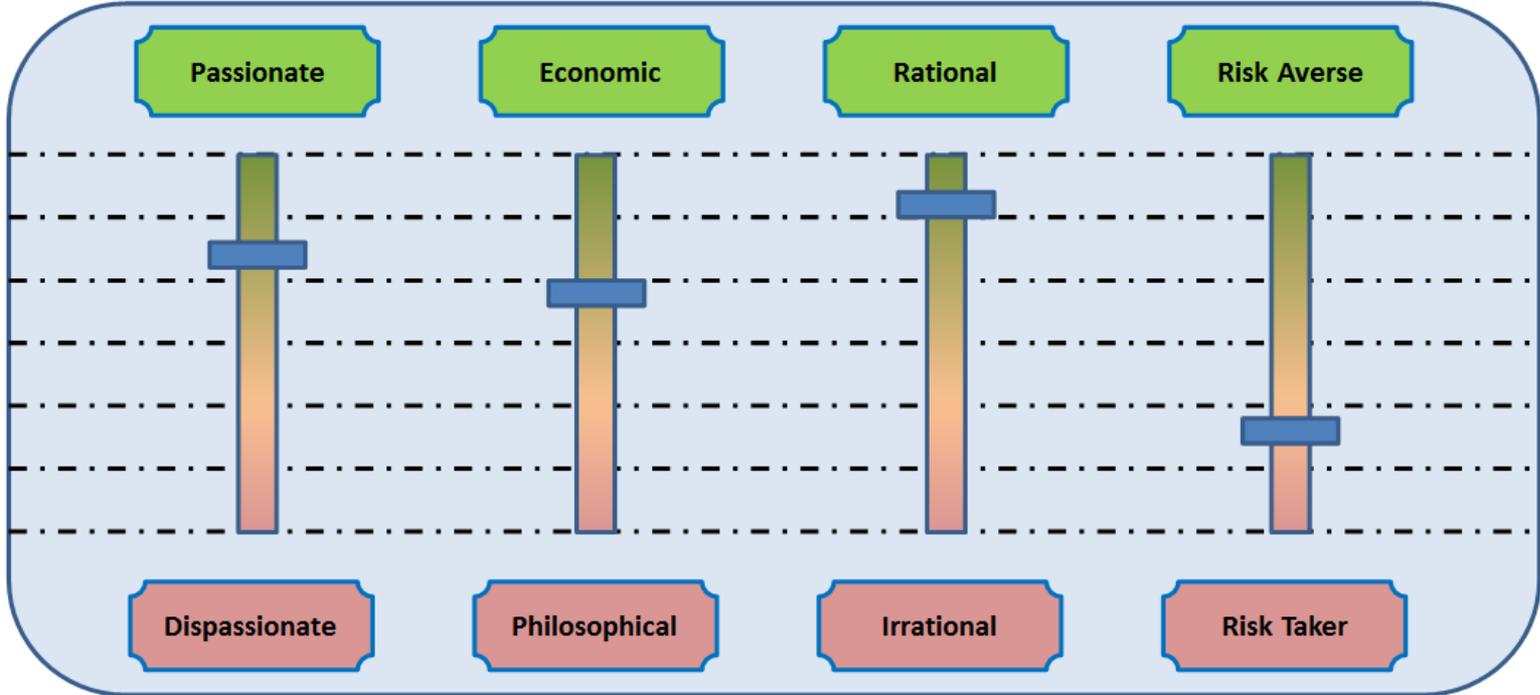
Stakeholders

- Community members / groups
- Politicians (Commonwealth / State / Local)
- Wannabe politicians
- Those positively/negatively affected by the proposal
- Self-proclaimed spokespeople
- Competitors
- Media (mainstream and social media)
- Delegate (CEO, Senior Executive)
- Program management
- Evaluation Working Groups
- Probity/Legal/External Consultants
- Any more?



Stakeholder engagement

Quickly setting your stakeholder dials correctly



Stakeholder engagement

Stakeholder engagement

- Make sure your proposal is “talking” to stakeholders in the right way
- The more we understand what drives a person (in a decision making process) the easier it is to target messages towards them
- Our messages must be ‘music to their ears’



My cardinal rules of bid writing

- **Grant applications require an investment (effort/money)**
- Never rely on brochures and other market collateral
- Respond to the questions with some thought
- Answer the questions... each component
- Accuracy and simplicity
- Never assume the evaluation team 'knows you'
- Ensure you submit a compliant application
- Be sympathetic with Assessors

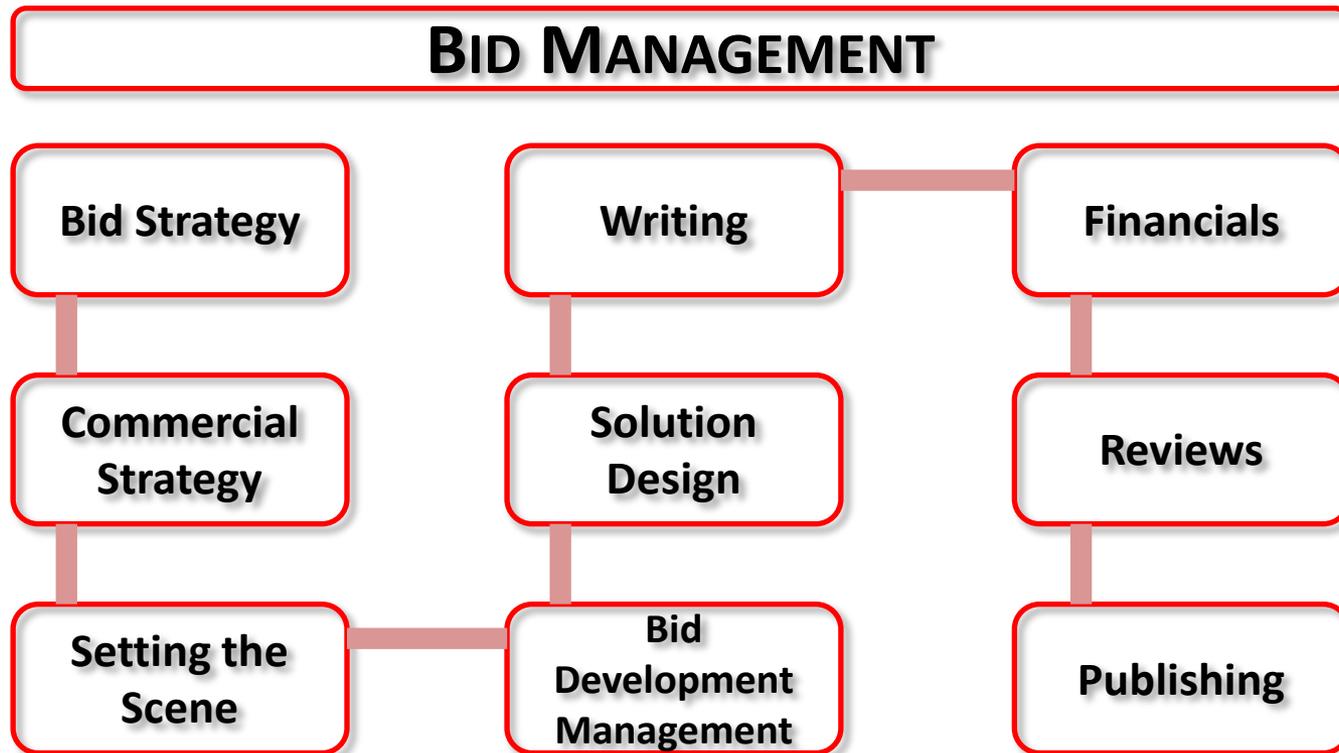


Time invested in bid planning and preparation reduces stress, improves productivity and increases the probability of winning.

Bid management process

Function of the bid ☞ TO SELL

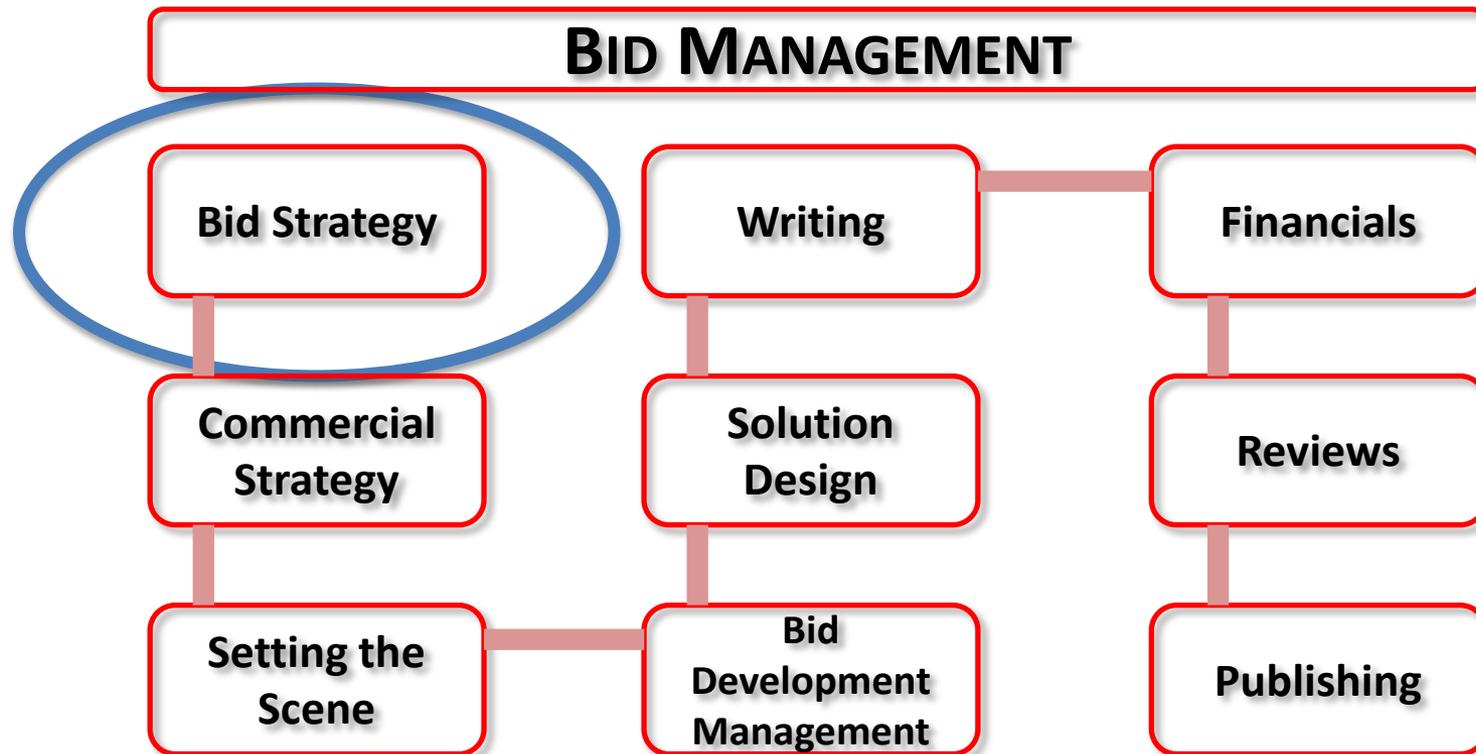
- It's a sales process!



Bid management process

Function of the bid 🖱️ TO SELL

- It's a sales process!



Bid Strategy

Information is critical

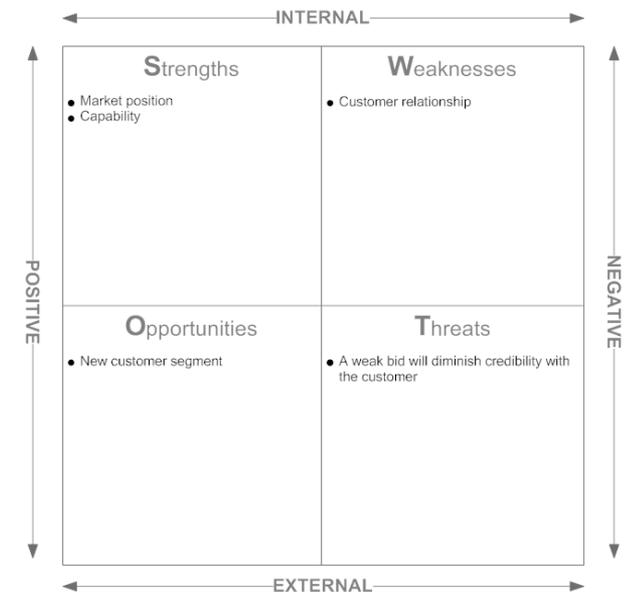
- What do you know about the market?
 - Who are your competitors?
 - What do they offer?
 - How good are they?
 - What are their strengths and weaknesses?
- What do you know about the program?
 - What's driving the program objectives?
 - Do you have existing relationships?
 - How are your relationships affected by the grant process?

Bid Strategy

Information is critical

- What do you know about the program?
 - What projects are most likely to win?
 - What skills and experience are asked for?
 - What are the resource requirements?
 - What are the key dates?
 - What are the funding arrangements?
- What about your organisation?
 - What are your strengths and weaknesses?
 - What is your track record and credibility?
 - How important is this opportunity for you?

Turn **Weaknesses** into **Strengths** and focus on your strengths to overcome **Threats** to harness **Opportunities**



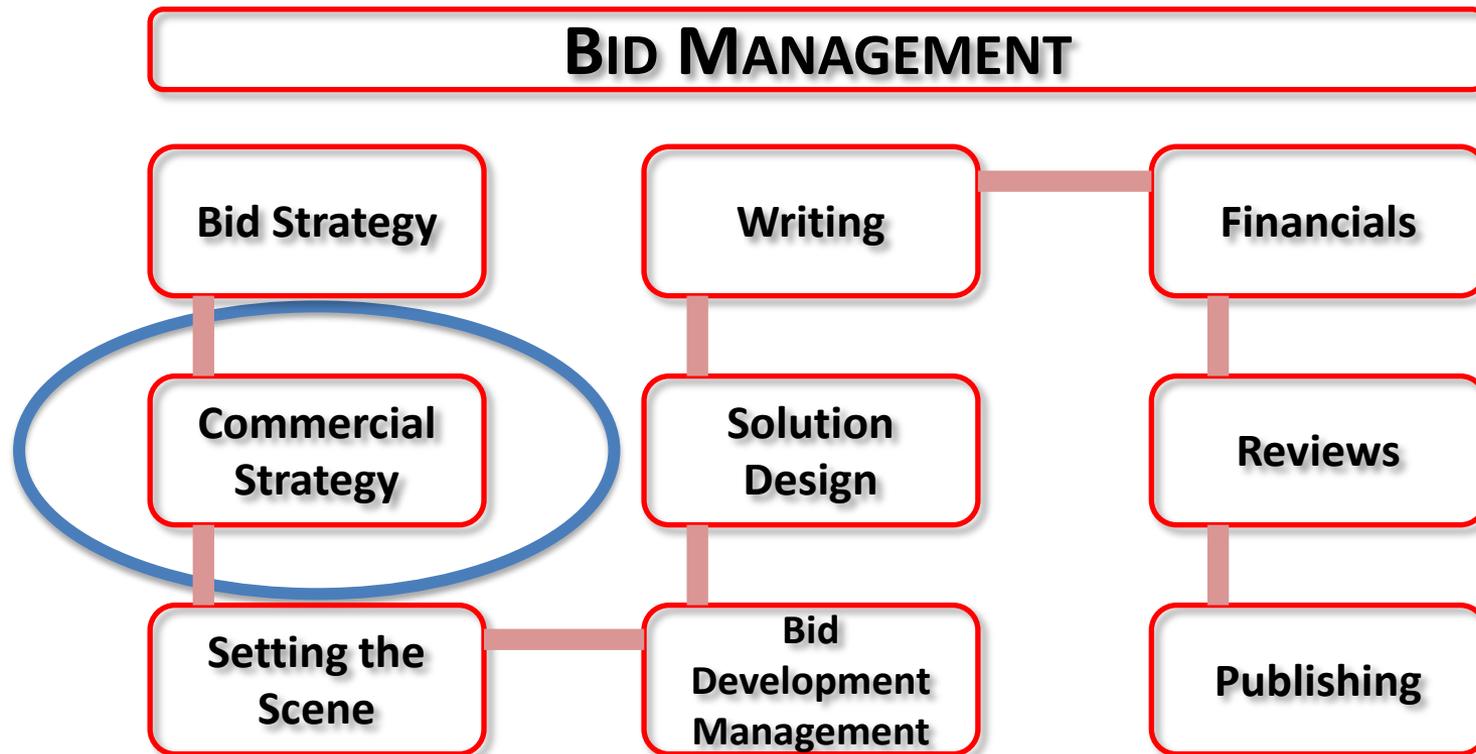
To bid or not to bid

- Realistically, can you win a grant?
 - Do you have the capability and experience?
 - Do you have good governance to manage the project?
 - Do you have the capacity (financial and people)?
 - Should you partner?
 - consortium
 - joint venture
 - subcontract
 - Do you have the resources to prepare and write the application?
 - What are the risks?

Bid management process

Function of the bid 🖱️ TO SELL

- It's a sales process!



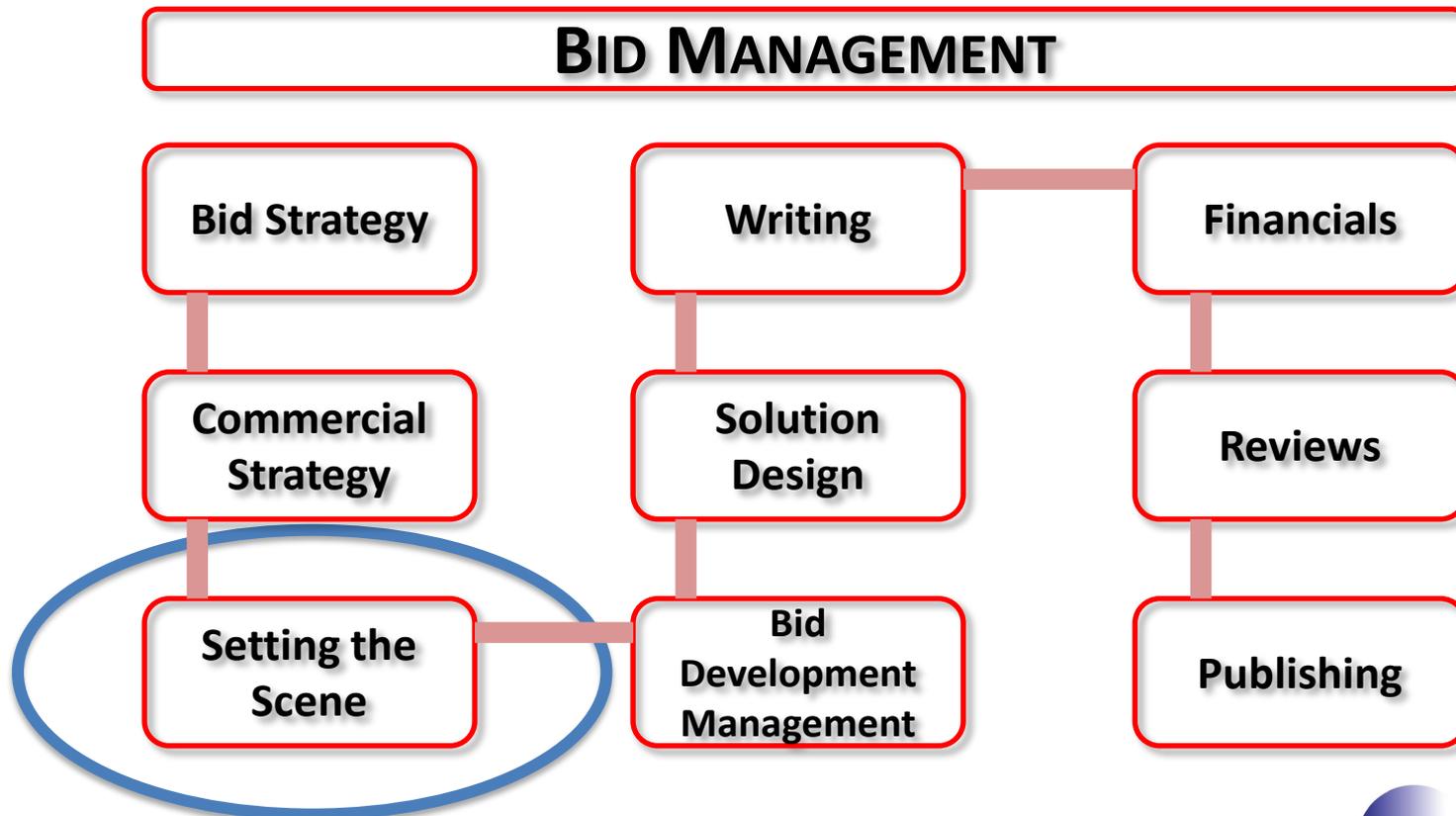
Commercial Strategy

- **Commercial strategy links to strategic objectives & financial viability**
 - Proposed project needs to link to strategic objectives of your organisation
 - Grant funding received needs to cover your project costs (making allowance for your co-funding obligations)
 - Important to understand your underlying costs to set an appropriate commercial strategy
 - If you 'under-cook' your application, it may be seen as a risk
 - If you 'over-cook' your application, it may be seen as unrealistic
 - How will you demonstrate your credentials in managing grant funds?
- **Establish the high-level funding principles at the outset**
 - What level of funding is required?
 - What justification is there for the funding?

Bid management process

Function of the bid 🖱️ TO SELL

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Scene setting

What is going to set you apart from everyone else?

- Create differentiators
 - is there something you can offer to stand out
- Sales Theme
 - a point of importance
- Key Sales Theme (sometimes called win themes)
 - something your competitors don't have
- Use Sales Themes as a bid management tool

Scene setting

Separators

- Something that makes you different from your competitors

Wow's

- A major attention getter.
(Are you going to offer something really outstanding?)

Crikey's

- Something that might worry the customer.
(A weakness of your competitor perhaps)

Groan's

- What will the competition say about you?
(They will look to expose your weaknesses)

Scene setting

Theme template

Theme	Demonstrated By ...	Benefit	Type
Community leader	Proven track-record	Quality Outcomes	Common
Innovation	Methodology uses mobile app to track progress	Better governance	Competitive

Theme type

- Common themes – to all bidders
- Unique themes – to you
- Competitive themes – to neutralise competitors

} **Key Sales Themes**

Scene setting

Confident and persuasive messaging

The Executive Summary sets the tone for the whole bid

- Show vision to the customer
- Focus attention on win themes
- Demonstrate your appreciation of the grant criteria
- Answer: what, who, how, when and why
 - What* will you deliver
 - Who* will deliver it
 - How* will it be delivered
 - When* will it be delivered
 - Why* you should receive a grant
- Articulate the value for money proposition
- Summary – yes, it means succinct

Write the Executive Summary **FIRST and as early as possible**

Scene setting - Confident and persuasive messaging

Executive Summary – it's about your customer

The Australia Government is transforming its delivery model for building stronger and more sustainable communities. Community plays a key role in building better regions; however, governments have traditionally driven projects to advance economic and regional development. Under its Building Better Regions Fund program, the government is empowering communities and stakeholders to participate in delivery partnerships.

Recognising the program's aspirational context, Better Bogs for the Northern Suburbs (BBNS) is applying to fund an investment business case for sewerage infrastructure in the far-reaching corners of the northern Wollongong suburbs. We align our application to the program's key priorities and the Community Investments Stream's linkage to strategic regional planning.

To ensure a balance between local social and economic outcomes, and broader community needs, our project is influenced by the following key characteristics:

- Project location, noting the need to support the well-being of those much-maligned people living in the Illawarra's remote areas
- The clear need to mitigate existing environmental risk by introducing better sanitation, with community involvement to advance the status-quo and reduce septic seep-out
- Demonstrated stakeholder commitment, including a co-funding requirement
- Underpinning value for money through robust project delivery, including quality and risk management, and
- Driving enduring outcomes through job creation and economic activity.

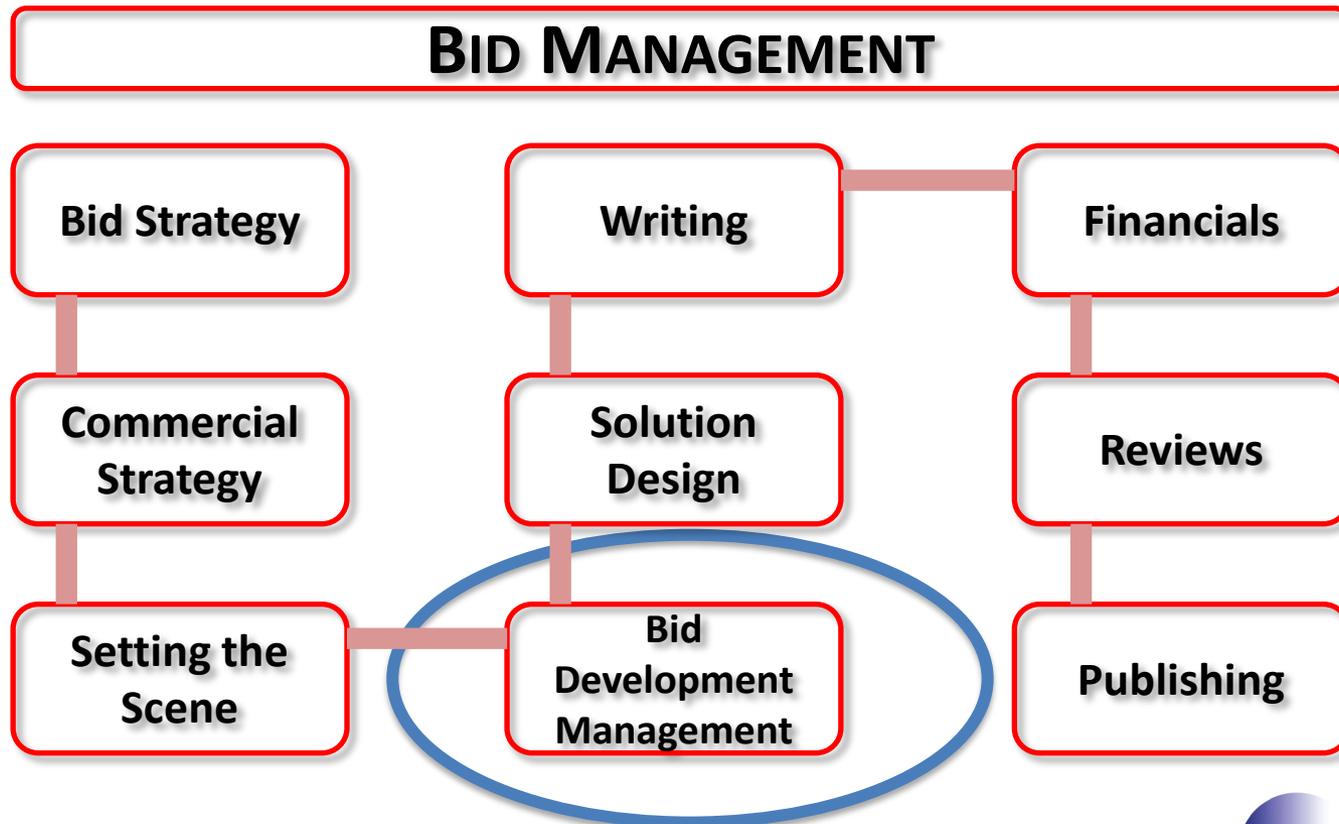
BBNS harness industry partnerships to articulate economic benefit and research capacity provided by local higher-education institutions. As an eligible not-for-profit organisation, BBNS will...

Particular
project concerns
– straightaway
they know we're
focused

Bid management process

Function of the bid 🖱️ TO SELL

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Bid development management

Appoint a **Bid Manager**

- Is responsible for developing and submitting the grant application
- Is responsible for obtaining and managing bid resources
- Is the link between different content contributors (subject matter experts)
- May be responsible for developing the financials
- Often doesn't get much sleep!

Win or lose, successful bid management centres on empowering a virtual team of subject matter experts to submit a professional response. The size and value of the opportunity will influence what level of resourcing is applied.

Bid development management

Bid Resources

- Venue
- Information Technology
- Stationery & Printing
- Marketing

Kick-off Meeting

- Sets ground rules for bid preparation and defines roles
- Set regular status updates
- Foundation for team cohesion and cooperation

What will help you do a good job?

- Project management software (e.g. Smartsheet)
- Screen capture tools (e.g. Snagit)
- Mind Mapping Software (e.g. MindMapper)
- Drawing tools (e.g. Smartdraw)
- Knowledge management system (e.g. SharePoint)

Bid development management

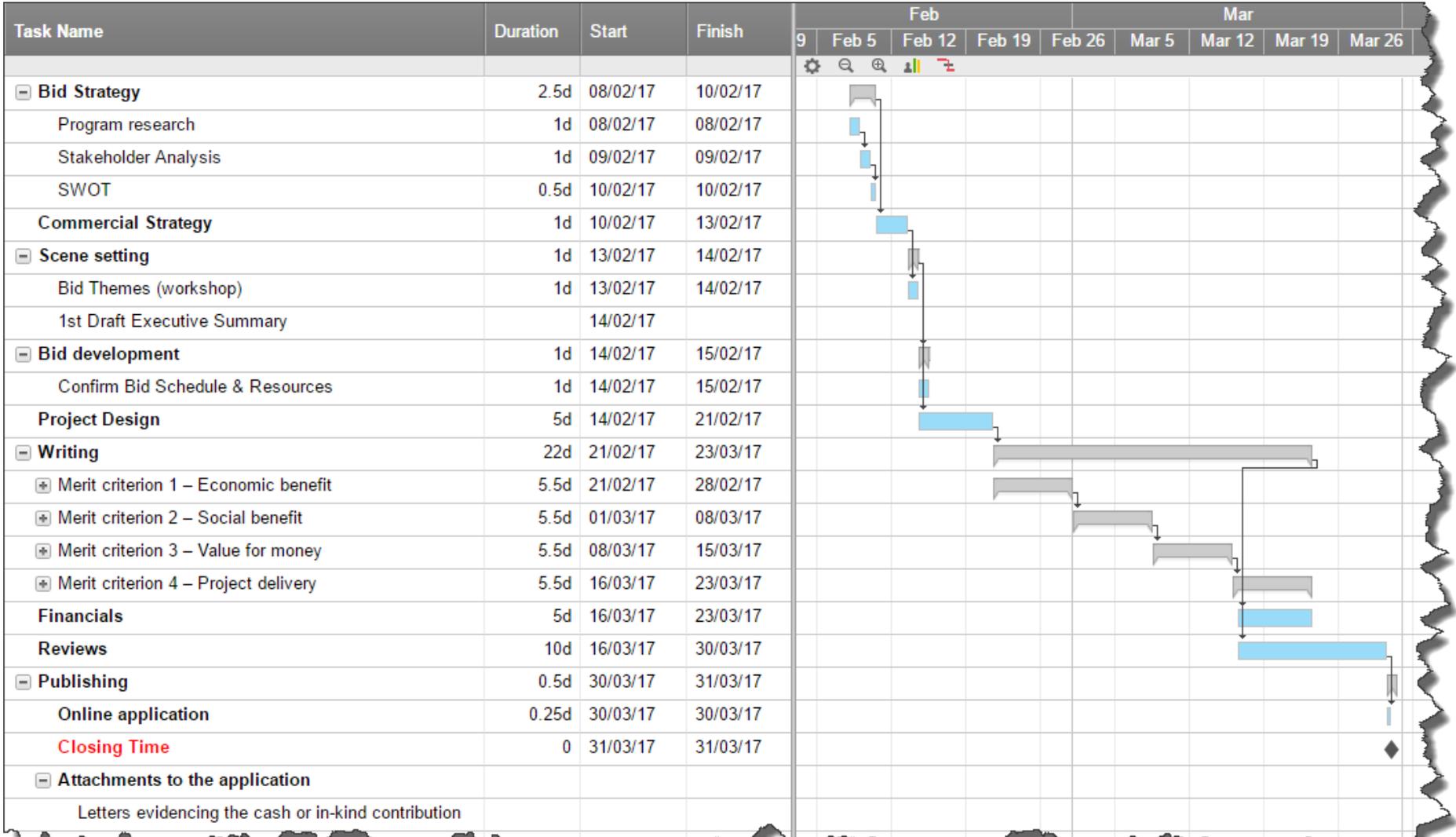
Bid Structure, Requirements, Terms & Conditions

Sections of the Grant Documentation

- Eligibility criteria
- Merit criteria
- Application Requirements
- Grant agreement
- Reporting requirements

Allow sufficient time to deal with all 'process' requirements

Bid development management



Bid management process

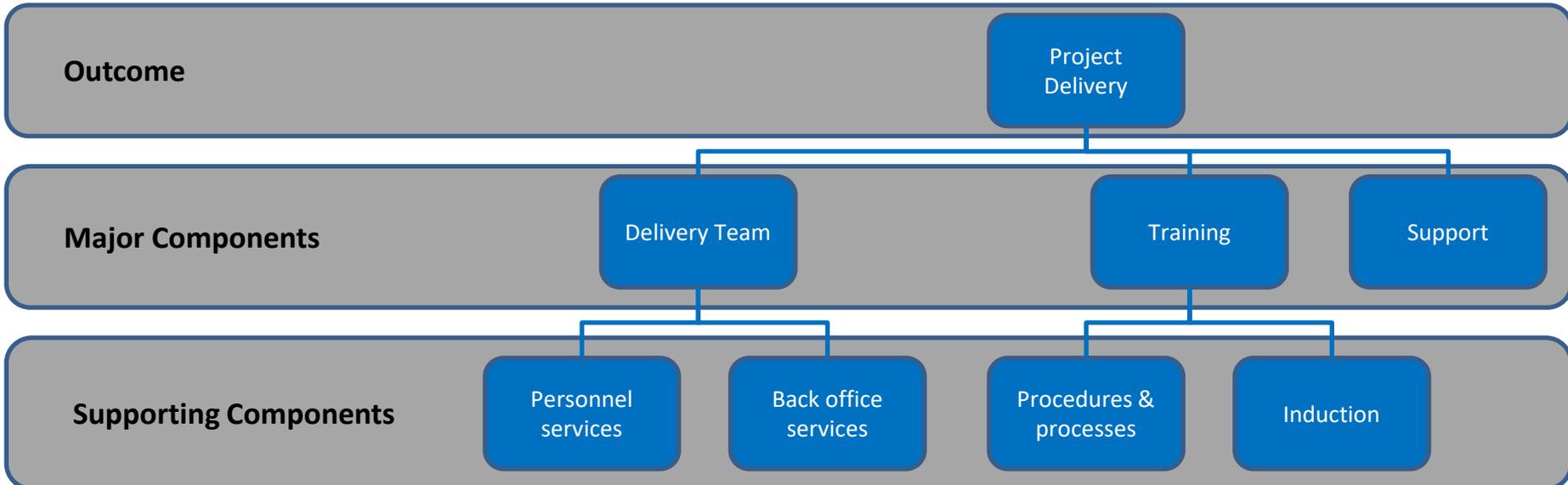
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Solution/Project Design

Develop a Work Breakdown Structure (WBS).



Solution/Project Design

Solution Work Breakdown Structure (WBS)

- Gantt Chart / Project Schedule
- Timeline of activities, duration and responsibilities, and milestones

Estimating Effort:

- List the tasks
- Estimate best, likely, worst case effort for each task
- Conduct a risk assessment for each task
- Delphi Technique - risk based selection of estimated effort

Do not Guess nor “Guesstimate”

Estimates are based on sound knowledge and experience

Solution/Project Design

Project Governance

- Project Plan, including a Project Schedule
- Probity Management Plan
- Risk Management Plan
- Quality Management Plan – and understand the difference between quality assurance and quality control events

Performance	Specific, Measurable, Achievable, Relevant, Timely (SMART) delivery targets
Quality	Quality Assurance – proactive (e.g. Peer reviews) Quality Control – reactive (e.g. Audit)
<i>Compliance</i>	Meeting legislative, regulatory, contractual and policy requirements in relation to roles, responsibilities and accountabilities
<i>Conformance</i>	Meeting process/procedural requirements (i.e. ensuring compliance and performance is achieved in the 'right' way).

Bid management process

Function of the bid 🖱️ TO SELL

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Why good writing is important

Grant processes are difficult to win

- Evaluation is about reducing the number of applications
- Plenty of competition
- Competitors are hungry to win too!
- Why give an evaluation team a reason to mark your bid down?

Your writing reflects the following characteristics

- Professionalism & quality
- Expertise
- Commitment
- Attention to detail
- Responsiveness
- Empathy

**Confident
Service
Delivery**

**Customer
Leadership**



Clear and complete writing

Tips to improve your writing:

- Use plain English where possible
- Imagine you are talking to your reader in a professional manner
- Sentences should have an easy flow, rhythm, pace and a logical connection to preceding and following sentences within a paragraph
- Be concise and use short words. Long words may not impress as they could be perceived as ‘trying too hard’ or ‘boasting’
- Keep sentence length down to an average of 15 to 20 words
- Stick to one main idea in a sentence
- Use active rather than passive language
- Avoid weasel words – “Typically, in most cases”
- Always check your writing – is it clear, helpful, human and polite?

Clear and complete writing

Focus your radar to keywords in questions:

Keyword	Meaning
Demonstrate	Need to <u>show</u> your track-record; e.g. use case studies.
Detail	Show 'how' and provide substance; i.e. what's under the bonnet. Provide evidence; e.g. attached example document.
Describe	A thorough narrative is required. But it's a good place to use case studies showing outcomes.
Comprehensive	Means more than a paragraph!

If you don't respond to keywords, your narrative will not be clear or complete!

Exercise



Clear and complete writing

Pick 2 questions from the following list and identify keywords and question elements which you would use to guide your response:

1. Broadly describe your organisation's experience in managing the delivery of projects similar to your proposal, and how this previous experience influences your project governance approach.
2. Provide recent examples of your project delivery, which are similar to your proposal, and detail outcomes achieved.
3. Provide the methodology your organisation will use to deliver the project, including specific detail on how you meet legislative and/or policy requirements.
4. The applicant must detail key risks and challenges it considers would arise from this project and how it would mitigate or eliminate them.
5. The applicant must demonstrate how it will manage quality in project delivery and methodology to be used.

Compelling and competitive writing

Stop and think:

- Everyone focuses on 'corporate' and 'product/service' strengths
- Many forget to focus on 'team' strengths
- Your team can be a key differentiator
- Strong CVs reflect a strong team!
 - Why do so many organisations submit terrible CVs?
 - Why do so many organisations fail to link delivery with specific team members (and their strengths)?
- What's better:
 - We will ensure all tasks are completed on time, or
 - Our nominated project manager (Jill Thegunpm) will ensure all tasks are completed on time. Jill has Prince2 and PMBOK qualifications and injects 25 years' project management experience in...

Compelling and competitive writing

Management Plans

- Good plans demonstrate good governance
- Good plans ooze professionalism
(they look good, smell good, feel good, navigate easily)
- Good plans are tailored
- Good plans articulate what you will do
- Good plans are a differentiator

Management Plans must not contain marketing hype

- Management plans are written as if you have won the grant

Dealing with contract assumptions

- Management plans should highlight assumptions made

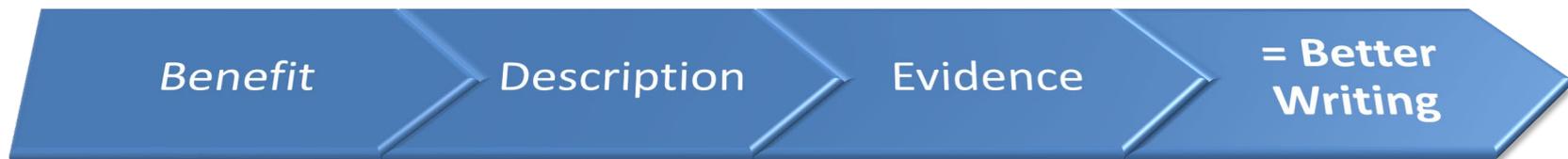
Identify and substantiate claims

Unsubstantiated claims can harm your bid

- We have a proven track-record...
- Our proven approach...
- We are the leading provider

Importance of proposal evidence

- Back your claims up with evidence - clear and factual
- Put the emphasis on outcomes
- Don't exaggerate
- Organise your arguments



Benefit statements

Understand the problem(s)

- What is the problem
- Who is impacted

What you bring to solve the problem(s)

- How are you solving the problem
- Who is impacted

Articulate outcomes

- What will change
- How will it change (key performance indicators)
- Who will be impacted

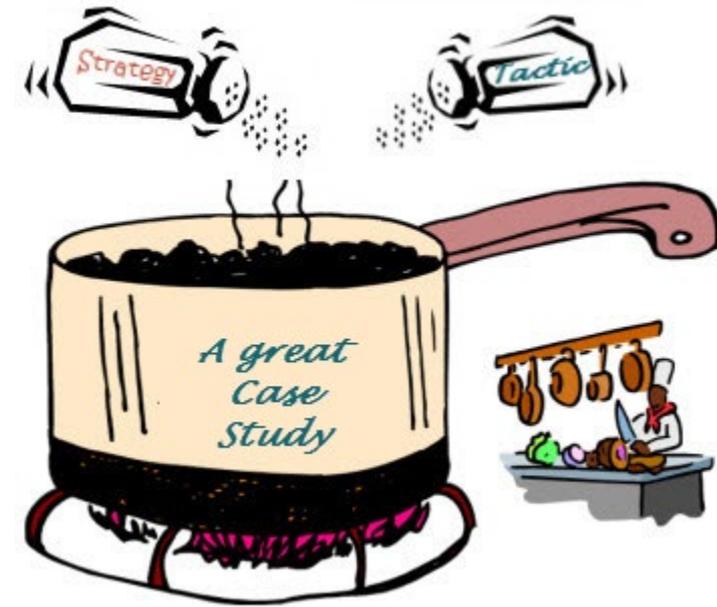
The power of good case studies

Case studies demonstrate experience

- Prove capability
- Show 'similar experience' to instil confidence
- Develop rapport with the reader
- Selected for their specific relevance
(i.e. flagship projects may not be relevant)

Case study ingredients

- 1kg of facts – but not too long!
- 1 cup of benefits
- 1/3 cup of understanding and response to challenges
- 2 tablespoons of collaboration – yum yum
- Pinch of strategies and tactics used
- 1/2 teaspoon marketing hype – use with caution



Planning to write

Structured writing using storyboards

- A planning tool to help writers
- A quality assurance tool to help the bid manager
- A sanity check for the writer
- A disciplined approach to writing

By using storyboards you will increase your productivity straightaway

Storyboard sample

- **Thesis** – why are they asking this question
- **Problem/Challenge** – what’s the context
- **Solution** – what we are offering
- **Key Points** – evidence of our capability and capacity
- **Exit** – the value proposition in a nutshell

Thesis Sentence
With the Australian Government’s long history of stated commitment to corporate social responsibility, robust environmental management is a cornerstone requirement in this project.
Problem/Challenge
<ul style="list-style-type: none"> • This project is set within an environmentally sensitive area. • Key environmental risks identified
Solution
<ul style="list-style-type: none"> • We understand the legislative, regulatory and policy frameworks • Strong project governance • Environmental Management System – provide overview as an attachment • Environmental Management Plan <ul style="list-style-type: none"> ○ Project induction (environmental briefing) ○ Work instructions for high risk tasks • Monitoring Resources <ul style="list-style-type: none"> ○ Full-time advisor (Environmental Coordinator) on the project team ○ Independent auditor advising Steering Committee (<i>Key Theme</i>) • Project team experience - Environmental Coordinator and Auditor • Address key risk identified with project-specific measures (<i>Key Theme</i>)
Key Points
<ul style="list-style-type: none"> • Address key risk identified with project-specific measures • Previous project experience • Two Case Studies (half-page each)
Exit
<ul style="list-style-type: none"> • We recognise environmental risk and respond with an effective environmental management system. • No incidents in past 3 years • Experienced people augmented by independent external expertise • Approach has been used successfully in the past on projects.
Figure 5 - Environmental Management System
<ul style="list-style-type: none"> • From corporate EMS overview

Writing

The link between writing and cognitive psychology

- Cognitive psychology: how people think, perceive, remember and learn
- Capturing attention = taking possession of the mind
 - Attention implies withdrawal from some things in order to deal with others
 - When readers become distracted, it is very hard to get them refocused
- As you read, the mind highlights particular content (good or bad)
- In tendering, you must capture the reader's attention with good writing
- Be remembered for positive recall and perception
- Offer stimulating content to support learning (e.g. innovation)

Writing

The link between writing and cognitive psychology

- You capture a reader's attention first
- Give readers a reason to pay attention: the art of creating a hook
- Make headings relevant and captivating
- Subtitles act as guides to the main context
- Titles and headings often pre-empt the narrative
- Precise communication creates stickiness
(i.e. creating a narrative to sustain the reader's attention)
- Sustain attention by avoiding distraction
(e.g. spelling mistakes and grammatical errors)

Writing

Write personably – but not informally

- Use 'we' and 'our'
- Capitalise proper nouns - e.g. Commonwealth
- Avoid pub talk – e.g. We'll get this project firing on all cylinders

Minimise capitalisation

- Common nouns – avoid
 - Federal... only when part of an official title
 - the Education Minister... the minister
- Capitalise the principal words in headings

Avoid highlighting words in **bold**, different **colours** or by underlining

- Highlighting can change the message and distract the reader
- Bold is best for headings and sub-headings

Writing personably

Write personably

Mainline Solutions will minimise risk, by integrating project elements using Mainline Solutions' mature project management framework. Mainline Solutions project management framework has been used on 15 successful projects in the last 12 months. Mainline Solutions will use its professional consultants to inject insightfulness by drawing on similar project experience and applying effective treatments.

What's wrong with this paragraph?

Exercise



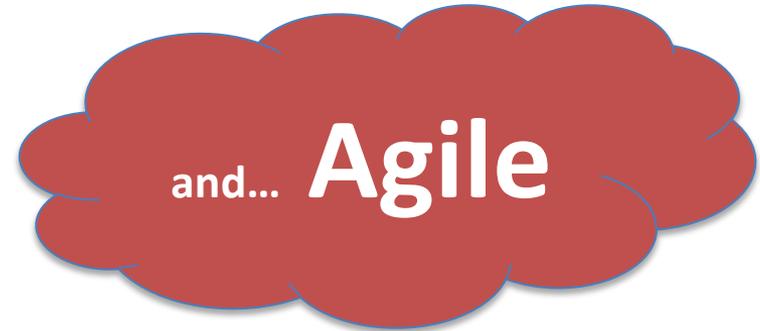
Words to avoid

- What are some of the words/phrases you don't like?
- Are any of them frequently used in your company/organisation?

Writing

Words to avoid

- Irregardless (it's not a word!)
- Paradigm
- Really (and truly)
- Synergy
- Towards (use toward instead)
- Upwards (use upward instead)
- Very
- Impact (as a verb)
- Overuse of 'action' words such as 'prioritisation' and 'implementation'
- Unsubstantiated superlatives such as 'unique', 'best', 'totally', 'unparalleled', 'renowned', 'perfect' and 'ideal'
- Best practice / best-in-class (can be perceived as arrogant)
- Exceeds world's best practice (can be seen as stupid!)



Writing succinctly

Mark Twain said, “If I’d had the time I would have written you a shorter letter.”

Readers are time poor

- Evaluation teams are content-driven and decision-focused
- Many business writers can produce a lot of text with little substance
- No substance = reader frustration and no scoring points
- Use as few words as possible to deliver your message
- Brevity does not mean you must sacrifice clarity and critical information

Succinct writing conveys a tone of confidence

Writing to win themes

Win themes and discriminators

- Know them before you start writing
- Decompose win themes into messages before you start writing
 - “Proven” means what for the customer....
- Win themes – link to customer needs; things that’ll switch them on
- Discriminators – reflects your competitive advantage
- You must gain the readers’ trust for win themes to be effective
- Gain trust by demonstrating empathy, credibility, reliability and evidence
- If you want to lose trust quickly, use weasel words

Common-sense cross referencing

Better practice cross referencing

- In cases where the response is lengthy, a comprehensive response should be provided in one document and then cross-referenced as required
- When cross referencing, provide a teaser

Improvements of up to 17% have been achieved in turn-around-times for the XYZ program's critical requirements since July 2016. These improvements underpinned a 14% cost reduction and contributed to a 7% increase in defined program outcomes. The processes we used to achieve XYZ program improvements are described in Attachment 1.

Layout and use of graphics

Graphics

- When selecting graphic displays for conveying information consider the following research (Levy, Zacks, Tversky, & Schiano, 1996):
 - Use bar charts for conveying detailed information about individual data points
 - Use lines for conveying trends
- Graphics “speak” to those who are visual learners
- People with visual-spatial intelligence have a strong photogenic memory
- Graphics convey detail in a simplistic manner
- Graphics can create an emotional connection with the reader

Layout and use of graphics

Layout

- Publishers carefully design newspapers and magazine layouts
- Design your layout to help the reader
- Design your layout to help cognitive recognition
- When people are in a positive mood they will perform better on cognitive tasks
- Research demonstrates high-quality typography induces a positive mood (Larson & Picard, *The Aesthetics of Reading*)
- Good page layout includes typographically correct headers, paragraph indentation, good figure placement, and block quoting
- Readers notice symmetry

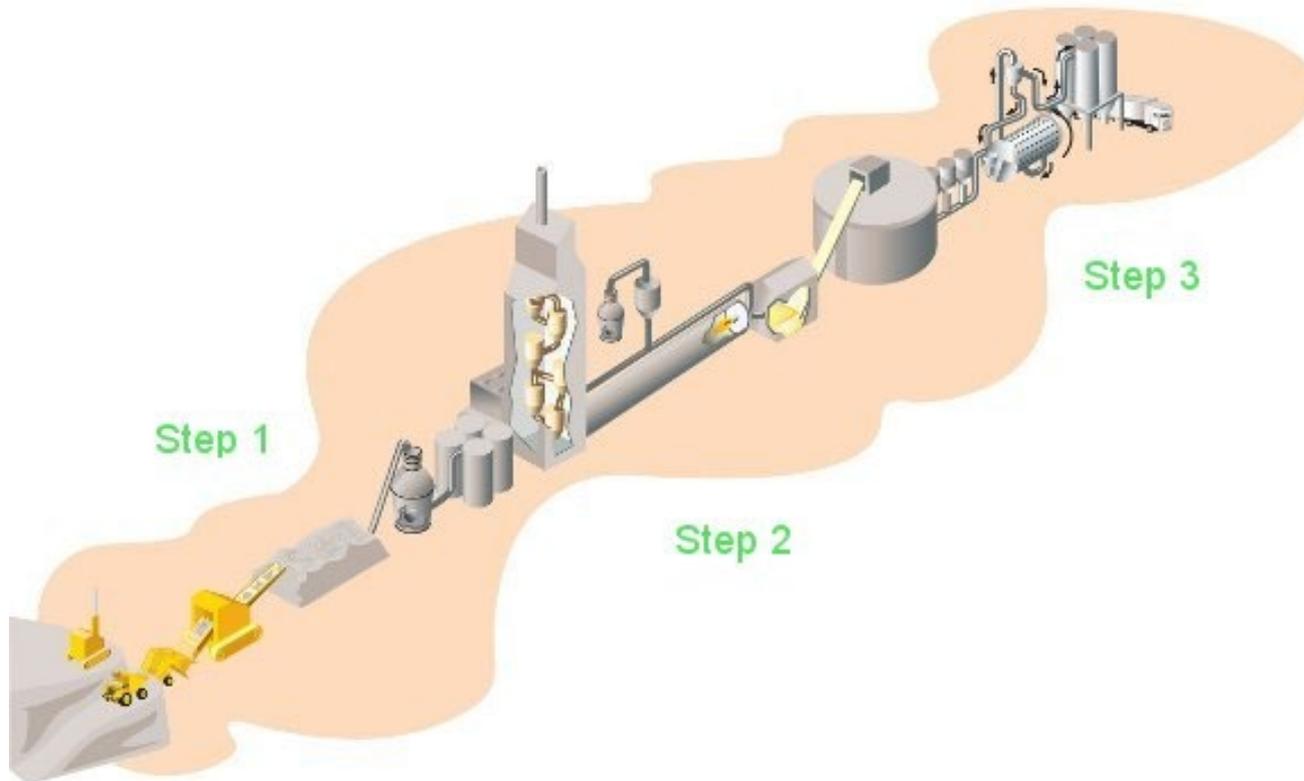
Layout and use of graphics

Example of poor layout



Layout and use of graphics

The writer can bring this graphic to life



Proofreading and editing

Check your own work

- Avoid relying on someone else to edit your content
- Don't just copy what has been done before
- Be known for your high quality and timely content
- Simple quality assurance techniques
 - Read backwards (!! – but that is a journalistic technique)
 - Expand your font to 150% zoom, change your workflow from a writing to editing
 - Read aloud (even using software)
 - Print and read
 - Peer review
 - Check against the Style Guide, A Guide to Writing Proposals, dictionaries and other reference sources

Present a professional narrative, which reflects your business.

Financials

A difficult part of bidding

- How much should you ask for?
- Will you be able to sustain your business?
- What other projects/activities could be impacted?

Benefit of preparation

- Commercial strategy
- Solution/project design provides cost inputs
- Market knowledge identifies competitive pressures
- Risk assessment (Negative/Positive)

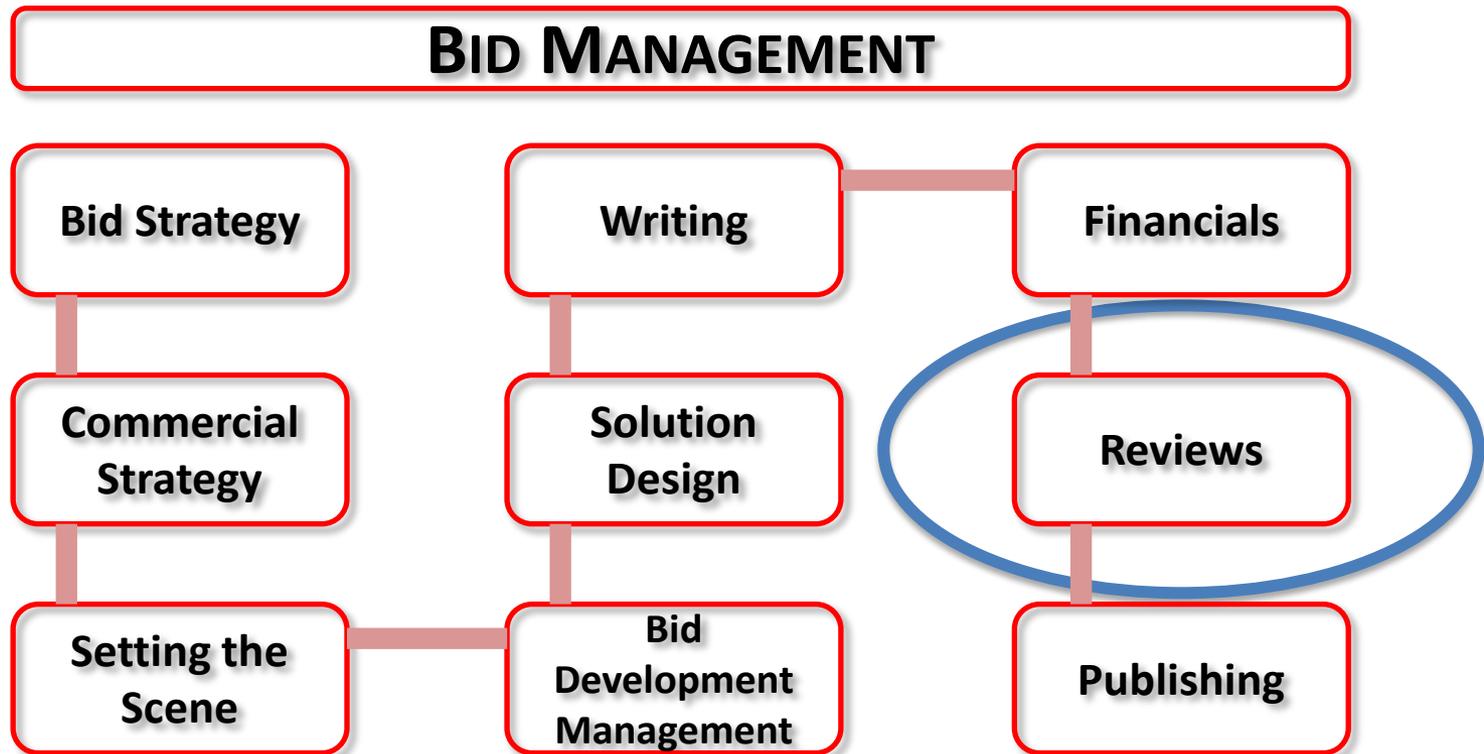
Life cycle costing

- Cost of set-up
 - project management
 - solution development
 - recruitment
 - training
 - mobilisation
- Cost of delivery
 - internal resources
 - specialised product/service support
 - external resources
 - administration
- Cost of wind-down
 - asset disposals
 - office make-good
 - decommissioning

Bid management process

Function of the bid 🖱️ TO SELL

- It's a sales process!



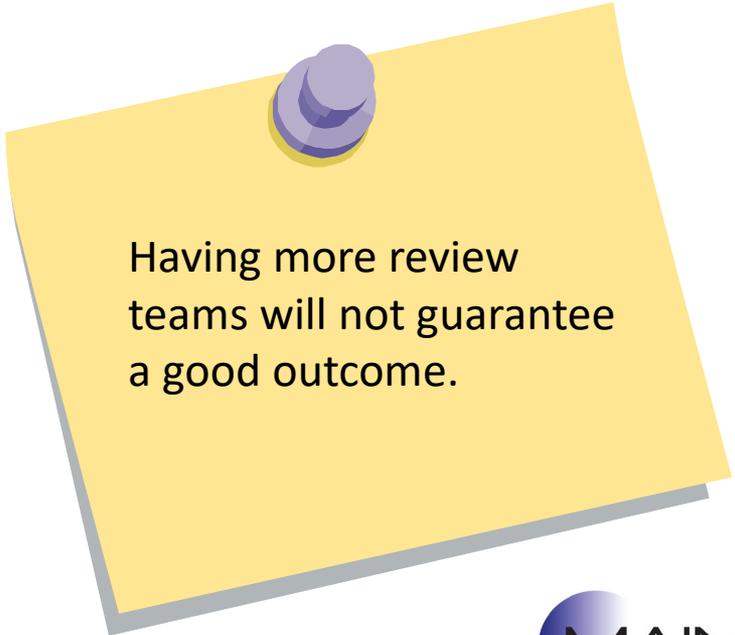
Reviews

Red Team

- Quality Assurance
- Constructive Criticism
- Could be External

Gold Team

- Money issues
- Approval to submit



Having more review teams will not guarantee a good outcome.

Reviews

Review teams must have

- a defined scope
- a defined methodology
- guidance
- defined outcomes

Review processes must

- not stop the bid development
- involve the 'right' people
- be managed

Editing

- Syntax, structure, single voice, tone and message delivery
- Version control

Why, after putting in so much effort, would you want to submit a poorly printed bid?

Plan ahead

Submission

Submit your bid

- On time
- In the right format
- With the correct number of copies
- In the right place
- Addressed correctly

The finish line



The finish line

Handling clarifications

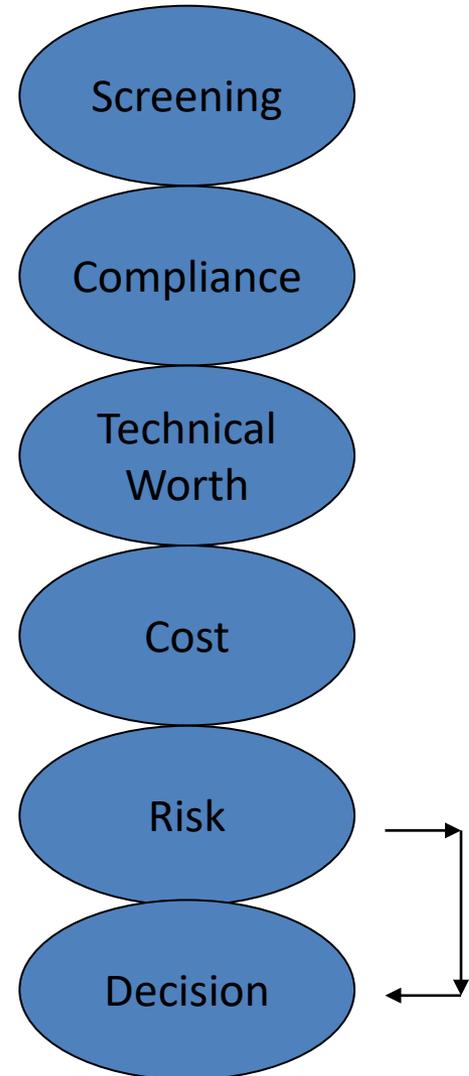
- Read 'between the lines'
- Do not avoid answering questions
- Reconsider your initial response and work out why your message was not fully understood
- Do not re-hash material already presented in your bid

The finish line

Presentations (Part of Risk Assessment)

- Can this organisation really deliver?
- Does this team really have the experience to deliver?
- Will their project meet program governance requirements?

Your Presentation may be your final Differentiator



The finish line

Presentations

- Prepare well before & rehearse
- If asked to address certain aspects of your application make sure to cover these thoroughly
 - Embed Key Sales Themes in your answers
- Do not introduce new material
- Do not ask about other presentations – if you do, your actually asking them to divulge confidential information
- Think about ‘who’ does the presentation
- Delivery Style
 - Be natural... try not to stage the delivery
 - Be succinct
 - Don't waste time or over-sell

Thanks

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