

10 Tips for a Successful Planning Grant Application

Tip 1: Learn from the errors of previous applicants. All grants are reviewed by at least three readers and each response is ranked from 0 to 4 with 4 being Excellent. The following table shows the questions, from 2009-2011 applications, with the lowest scores. Questions are ranked by the percentage of applicants with scores of 0, 1 or 2 – those questions ranked as fair, weak or not addressed. Items highlighted in yellow show questions with 40% or more of the grants scoring 2 or lower.

Responses to the Rubric ranked by the questions with the lowest scores

	Score on Rubric with 0 being lowest score					
	Less than average or Average rating	Not addressed- 0	Weak- 1	Fair-2	Very Good- 3	Excellent- 4
Detail competitive advantages that will set proposed school apart and attract students (St.Pop)	61%	11%	24%	27%	25%	13%
Evaluation of curriculum and instructional design against state-of-the-art alternatives relevant to school's population (Ed Prog)	59%	3%	35%	21%	25%	16%
Detail anticipated enrollment for years 1-5 (St.Pop)	56%	4%	13%	39%	23%	21%
Retention strategies (At&Par)	55%	4%	33%	17%	21%	24%
Contractual relationships don't show related-party relationships (Proj Tm)	55%	9%	33%	12%	17%	28%
Detail proposed grade levels. Demonstrate understanding of the developmental needs of students (St.Pop)	53%	0%	17%	36%	24%	23%
Describe characteristics of anticipated student pop. Identify why targeted students will choose the proposed charter school. (Ast Comm Need)	52%	1%	17%	33%	31%	17%
Describe measurable, discrete educational goals innovative enough that school will provide leadership (Ed Prog)	47%	1%	25%	20%	32%	21%
Pre and post opening budget is realistic; Management plan is aligned with budget detail and costs explained. All proposed vendors names with rates (Fin Op)	45%	1%	12%	32%	33%	21%
Clear overview of the instructional design including how design will enhance student achievement. Include teacher professional development (Ed Prog)	44%	0%	19%	25%	33%	23%
General description of the curricula and how all students will meet MI expectations (Ed prog)	41%	3%	13%	25%	35%	24%
Support services included (Ed Prog)	41%	0%	9%	32%	31%	28%
Parent and community involvement in design of school and education of enrolled students (At&Par)	41%	0%	12%	29%	39%	20%
Describe annual standards for student achievement (As&Eval)	37%	4%	13%	20%	27%	36%
Plan to collect student achievement data and self-assess SIP data (As&Eval)	37%	1%	19%	17%	32%	31%
Development team is proactive in plans to obtain authorizer; working relationship w authorizer is described (ProjTm)	36%	0%	19%	17%	15%	49%
Governance board membership has been identified, training desc. and oriented to governance resp (ProjTm)	35%	0%	8%	27%	33%	32%
Plans for managing the subgrant including the subgrant funds are identified; non-profit board understands its resp.for grant funds (Fin Op)	35%	0%	16%	19%	24%	41%
Facility and planning process show understanding of MI's legal requirements and cost implications (Fac)	35%	3%	4%	28%	35%	31%

Abbreviations: As&Eval: Assessment of Community Need, St Pop: Student Population, Ed Prog: Educational Program, At&Par: Attendance and Participation, As&Eval: Assessment and Evaluation, Proj Tm: Project Team, Fac: Facilities, FinOp: Financial Information

The weakest areas for previous applicants were:

- Detail competitive advantages that will set proposed school apart and attract students
- Evaluation of curriculum and instructional design against state-of the-art alternatives relevant to school's population
- Detail anticipated enrollment for years 1-5
- Retention strategies
- Contractual relationships don't show related-party relationships
- Detail proposed grade levels. Demonstrate understanding of the developmental needs of students
- Describe characteristics of anticipated student pop. Identify why targeted students will choose the proposed charter school.
- Describe measurable, discrete educational goals innovative enough that school will provide leadership
- Pre and post opening budget is realistic; Management plan is aligned with budget detail and costs explained. All proposed vendors names with rates
- Clear overview of the instructional design including how design will enhance student achievement. Include teacher professional development
- General description of the curricula and how all students will meet MI expectations
- Support services included
- Parent and community involvement in design of school and education of enrolled students

Learn from the comments of reviewers.

Tip 2: Make sure your discussion of the community is specific and you prove there is a need for your proposed school. Comments from reviewers suggest:

- The applicant does not indicate specific community knowledge and insight. The "community" described cuts a wide swath across metro-Detroit, from west to east, with students expected to be drawn mostly from the boundaries of the DPS district. The proposal lacked targeted focus. Focus on a smaller targeted community/neighborhood.
- Cite data sources. Data is confusing or presented poorly.
- Proof read the grant to ensure the information presented has no misspellings or grammatical errors -- after all, you want to start a school.
- Include community assets, not just liabilities and a listing of all the problems.
- Community research data should be current. There are no citations for the data provided. The educational needs are not well described and there is no presentation of assessment or achievement data for the targeted community.
- The community analysis lacks an explicit need that makes the proposed school a necessary option for students and families. Additional support data about the existing schools and why they are failing to meet local needs would make this section stronger

Tip 3: Be precise about the developmental needs of the students and how the curriculum proposed meets their needs. Comments from reviewers suggest:

- There is confusion about grade level service so the developmental needs are not specified with differences between K-6 and 7-12. Respondent needs to identify with specific detail what the developmental needs are within each grade level (i.e. academic, social and safety needs).
- The application seems to summarize conclusions of the applicant rather than provide an overview of the understanding as to how the population of students will be served.
- The information about the developmental needs is in the curriculum section and is not clearly linked to this question. Link the development needs of the students to specific instructional approach.
- The characteristics of students are detailed, but the reasons behind their challenges have not been clearly identified to ensure that the program is the right "fit."
- The applicant needs to include some research to support concepts as innovations.
- It appears that a majority of this section was extracted from another document that was not applicable for this purpose.
- Need more nongeneric detail about the competition and the proposed school's strengths. It is not clear where these students will be drawn from (i.e., where these students are currently being educated) and why they will be compelled to leave their current setting.
- There is not an explanation of why these schools are seen as competition and what your competitive strengths offer.
- Applicant may consider narrowing down the competing schools list to a certain radius (i.e., 5 blocks or 1/2 mile, etc.) and including achievement data from competing schools.
- The listing of schools lacks description, especially as it relates to the proposed school's strengths. The competition is not clearly described with regard to educational performance.

Tip 4: Make sure the instructional design is research based for the proposed population. Comments from reviewers suggest:

Strong goals, curricula and instructional design

- Goals could be made more specific and robust. Goals should have been enumerated: specific, measurable, achievable, results-oriented, and time sensitive (SMART).
- Goals listed in the application are on par with surrounding schools; the expectations are no higher than surrounding schools. There need to have additional goals that are achievable on an annual basis.
- Vision and goals do not seem to be realistic. In addition, the applicant offers little that shows any research or thought has gone into how those goals would be achieved. It is one thing to say that 100% of students will be reading at grade level by 8th grade. There is no evidence that applicant understands what achieving these ambitious statements entails.
- There is little evidence of innovation.
- No evidence has been provided of objective curriculum evaluation against alternatives. Additionally, no description of criteria used to evaluate curricula was provided.
- Research criteria are not adequately provided.
- Please provide the rubric or list of criteria used in evaluating curriculum programs.

- Writers adopted Oakland International's curriculum, but it is unclear what evaluation criteria were considered.
- Applicant states that several programs were evaluated, but no Evaluation criteria are listed.
- It is not clear how the selected curriculum is adapted to specified student population; it appears they have grabbed several pieces off the shelf and have not considered how they will be integrated into a coherent curriculum meeting MI expectations.
- Applicant could benefit from describing pedagogy, instructional strategies, research and or educational approach used for each content area. The current description is more of a plan of action rather than description of curriculum and its strengths.
- Applicant fails to describe how teachers will master the instructional approach. A plan for professional development should be proposed.
- Research foundations are not detailed, except to say that they will be based upon "best practices."
- One strength of the application is its plans for technology-based learning. It is not clear how teachers will receive appropriate training and continuous learning to successfully integrate these platforms into their instructional practice.
- The applicant proposes project-based learning as an instructional approach, but lacks detailed information about teachers will develop and implement engaging projects. Additionally, the information provided shows some understanding of the basic process of creating projects, but does not connect this general advice to specific projects that might be relevant to this specific student population. Similarly, although service learning is mentioned as an important instructional strategy, no specific projects are mentioned, no teacher supports are articulated, and no evidence that appropriate service learning partners has been identified.

Tip 5: Include details of the support services that will be provided for students with special needs/at risk. Comments from reviewers suggest:

- The plan should be specific regarding at risk and special needs services for students. The response provides a laundry list of services and activities to be provided but without much detail about services, activities and the impact expected.
- Lacks understanding of allowable uses of Title I Funds. Provides no details of after school instruction, educational programs, etc. No discussion of in-school supports (during instructional day).
- Staffing plans for intervention programs (i.e., after school tutoring) do not reflect best practice (i.e., placing most experienced instructors with the neediest students). School day embedded interventions should be explored.
- The applicant mentions providing a 21st century program, but does not include a plan for successfully applying for such funding, nor how these services would be provided in the absence of a 21st Century Grant.
- The plan needs more steps defined, such as identification, testing IEP support groups. Lacks innovation, need to address compliance with the MARSE (Michigan Administrative Rules for Special Education) and the ISD SE Plan for the Delivery of Services.

- They lack depth in explanation of how they will handle the implementation of IEPs and other modifications.

Tip 6: Be specific about why students will enroll in your school and how you will keep them there. Comments from reviewers suggest:

Providing detail about advertising and recruitment plans

- How will your school stand out against your competition?
- Identify specific target groups and how to reach them. Include concrete timelines and activity descriptions.

Including specifics related to retention strategies

- The applicant provides a list of 5 general strategies for increasing retention. However, there is no evidence of how students' desire to remain in the school will be monitored, nor which interventions will be put in place should students express interest in leaving the school.
- School success is not enough, particularly given the nature of the population being served. You did not discuss strategies appropriate to the anticipated student population.
- Does not provide any research-based strategies to retain the proposed population.
- The described RTI plan is not a retention plan.

Ensuring parent and community involvement in design of school and education of enrolled students

- There is no indication that parents of school age children are included in the development team or the applicant board of directors.
- Identify specific measurable programs to involve parents. No direct feedback from parents- mostly one way communication. A list of parent-school activities is needed.
- The plan does not establish a vehicle for two way communication.
- Assumes all parents will have a high enough computer proficiency/ access to monitor their child's academic progress.

Tip 7: Make sure you will be able to prove that your students are making progress on the proposed annual assessment of student achievement. Comments from reviewers suggest:

- Lacks specific metrics to align outcomes to instructional strategies.
- While the applicant offered some evidence regarding assessing students upon enrollment, they did not articulate an ongoing strategy to monitor and assess student academic achievement with standardized measures, nor a plan for informing students of their progress.
- Lacks a plan for data-driven decision making; execution of the use of data is not evident.
- Yearly progress goal is unreasonable. Use of pre and post testing during the same year recommended.

- Assessment of student achievement lacks specifics, including all the assessment designs, how often they will be given, and how MI grade-level content expectations will be tied to them.
- How will parents receive regular, confidential, reports from standardized testing and progress reporting?
- Does not provide wide variety of assessment tools. There is no discussion of how formative and summative assessments will be used to document student improvement or as to whether the students are meeting academic goals. There is no discussion of how teachers will use these assessments to modify their teaching.

Describe annual standards for student achievement

- Annual standards should focus on local data that demonstrates growth; consider quarterly benchmarks and growth data.
- The standards are not framed in light of student achievement, but are more general statements that sound like goals for program evaluation.
- There is little here beyond state standards to show how this school will differentiate itself.

Plan to collect student achievement data and self-assess SIP data

- The MI School Improvement Framework strands should be the basis for data collection. It needs to be specifically addressed. No reference to how attendance, behavior, planned participation, teacher attendance data will be collected.
- How will the data be used to improve instruction?
- Lacks specificity and a plan to collect data
- The response misses Leadership, Personnel and Community components in the SIF and does not provide much narrative about what is going to be done with the data and how a feedback loop will occur toward implementing change based upon the data collected.
- This would benefit from a narrative creating linkage between data collection and the school improvement framework.
- There is no evidence of self assessment.
- Application could benefit from listing specific events and tools for data collection (i.e., parent surveys collected at conferences). How will community relations be measured?

Tip 8: Provide evidence of the qualifications of your team, including those on the board and those managing the budget. Comments from reviewers suggest:

Define strength of Development Team partners; clear roles for all parties are defined

- There is no discussion of the nonprofit board and its role and responsibilities in overseeing and administering the proposed grant project.
- There is no discussion about training the nonprofit board on its responsibilities for management of the grant activities and expenditures.
- What are the roles of individual members of the Project Team to the proposed grant funded project? The Narrative, Budget and Management Plan do not identify the

vendors responsible for implementation of planned activities proposed. There is no discussion of a contractual relationship with this person individually or collectively.

- It seems that the key team members are lined up, but there is no clarity about relationship, roles and responsibilities.

Governance board membership must be identified, and oriented to governance responsibility

- PSA governance board is not clearly suited for this work - biographical resumes and detailed background information has not been included to show strengths.
- There is no description of activities or plans for orientation of the board members or plan for professional development for the board. There is no indication as to how future board members may be recruited or recommended for appointment.

Plans for managing the sub-grant including the sub-grant funds should be identified

- It is not clear that the applicant organization understands its role and responsibilities for the grant project. There is no clarity in who will do what.
- Applicant needs to demonstrate what they know about budget and grant monies. Applicant does not appear to understand the role of the board.
- Identification of the personnel that are proposed to actually manage the grant project has not yet occurred. The relationship of the applicant board to the administration of the project is not described. Though X Company is described as a potential contractor, it is not clear if the organization is proposed to be a contractor to the grant applicant in administration of the grant award and tasks and deliverables, or only a vendor to the school when it opens. The application does not describe or define roles between the Board and managing group. Duties and responsibilities associated with grant responsibilities of the board have not been articulated.
- MDE reporting requirement and grant management are not detailed.
- There appears to be a lack of understanding regarding role delineation and a plan for who does what. It is not clear how much, if any, orientation the applicant board has received regarding the proposed grant application and activities.

Development team is proactive in plans to obtain authorizer

- A more detailed plan to seek a charter would be helpful. In the event that a charter is not available through SVSU, what plan does the applicant have for expanding its efforts with other possible authorizers? How will the applicant identify other potential authorizers?
- Proactive efforts to obtain a charter are not described in detail.

All partners have strong qualifications

- Diverse skill sets provide a strong partnership. Partnerships need to be further defined. The involvement of the development team seems unclear. The skills of the team members do not appear to be able to open a quality school.
- It is unclear if the proposed PSA board or Development team has a proven track record. No gaps are identified by the team although there appear to be gaps in understanding state law regarding conflict of interest, capacity in curriculum and instructional services, operational experience, at the least.

- You have not given us information on the Management Services' track record for evaluation. The relationships between existing board members of the nonprofit must be examined as it appears that a father and son are two of the three members on the board. This represents a potential conflict of interest as two board members are related parties.
- The individuals and entities expected to manage the grant have not been identified and their duties and responsibilities articulated.

Tip 9: Make sure the budget and management plan are aligned and the costs of contracted services are reasonable. Comments from reviewers suggest:

Facility and planning process show understanding of MI's legal requirements and cost implications

- Do the facilities identified as being considered match the capacity required by the enrollment numbers anticipated over time? How might the applicant address the proposed continued expansion of grade levels if a facility were selected that could not meet those expansion targets? How will the school board make the decisions about site selection? Upon what criteria and data will they rely? Might there be one or more facility studies commissioned as part of the planning process by a qualified firm? How the project might address these kinds of issues would provide a more expansive understanding of the process to be used.
- The reviewers question if the applicant may be optimistic with regard to the need for required renovations prior to occupancy.
- Good description of facilities but no cost calculations are provided and whether the resources may be present to assure that the facility may be reasonably leased from the proposed vendor and landlord.
- Additional information is needed about Safety Inspection Compliance costs identified. In general, planning grant funds may pay for cost of DELEG and Fire Marshall Inspections. Architectural fees are not chargeable to the grant program.

Pre and post opening budget is realistic; Management plan is aligned with budget detail and costs explained. All proposed vendors named with rates

- The Budget does not align clearly with the Management Plan and does not designate Stage I and II expenditures. There is no indication as to who will provide the identified purchased services and salaried services. Purchased services proposed does not indicate a rate of compensation, e.g. cost per hour.
- The reviewers express grave concerns regarding ratio of facility costs to total budget. Is the lease cost for fair market value?
- All purchased services proposed should include some basis for compensation, e.g. per diem or per hour cost, and number of hours or days proposed to for services. Detail is needed about proposed purchase of supplies, materials and equipment. Budget lacks adequate details for many line items.
- The budget is not clearly aligned with the Management Plan and Stage I and Stage II expenditures are not separated out in any meaningful way. Where purchased services are proposed there is no understandable detail as to what those services will include or the rate of compensation to the vendor. Reviewers are provided only aggregate amounts to assess. Other funding sources are suggested but not detailed.

- Proposed budget will require additional detail at the unit cost level. All purchased services proposed should include information about the rate of compensation to the vendor, computed on a per hour basis. The Budget detail should align more clearly with the identified Tasks and Products on the Management Plan, so that the expenditures in the Budget on MEGS is clear as to how it supports the activities on the Management Plan. The Budget in MEGS should be for the total amount requested, up to narrative document, according to Stages, which is useful. Some proposed expenditures may not be allowable to be charged to the grant, e.g. building lease costs, building renovations, office rent, etc.
- Budget lacks specificity. Much more detail needed to evidence a plan that is clearly set up for success.
- Not enough specificity and no identification of any other funds besides the planning and implementation grant funds.

Tip10: Choose providers who are best qualified and not related to you or anyone on your board. Comments from reviewers suggest:

Contractual relationships cannot entail related-party relationships

- More transparency is needed. There may be a potential conflict of interest in the applicant's proposal to be the education services provider (ESP). The applicant organization obviously has a vested interest in securing the ESP contract. Also, are applicant board members paid for their services? There is no discussion in the narrative concerning this.
- There are areas of conflict that may become evident as the development team moves to the next phase. The relationship between the nonprofit board, the developers, and the ultimate PSA governing board has yet to be fully established. Some individuals appear to be wearing multiple "hats" at this time.