

# County of El Dorado Grant Development

Kristin Cooper-Carter, Owner  
Vito Palermo, Senior Associate  
Melissa Uppendahl, Junior Associate  
Edward Ober, Junior Associate

Grant Management Associates  
[www.grantmanagementassoc.com](http://www.grantmanagementassoc.com)



# Today's Agenda

- ▶ Introductions

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- ▶ GMA Org Structure

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- ▶ Systems for Grant Writing

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- ▶ County Experience

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- ▶ Award Stats

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- ▶ El Dorado County Approach

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# Who We Are & What We Do

## WHAT WE DO

- Grant development and management in all sectors
- Strategic planning for corporations, nonprofits and municipalities
- College-level Training

## OUR CLIENTS

- Local Governments
- Fortune 500 Companies
- Non-profits
- School Districts
- Start-ups

## HOW WE WILL DO IT

- Personalized Service
- Tailored Grant Development Strategy
- In-Depth Staff Training
- Low Overhead
- Local

## OUR TEAM & PARTNERS

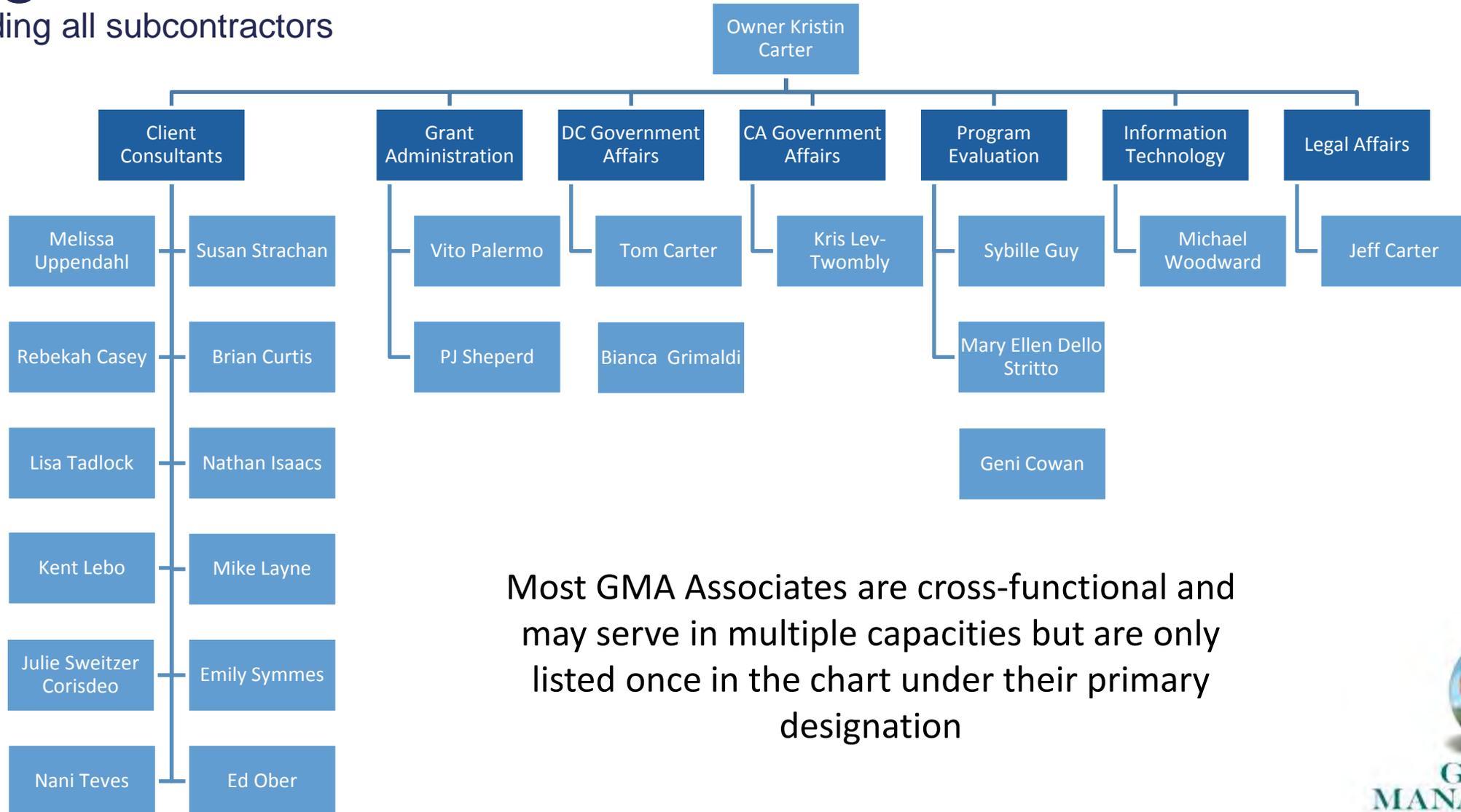
- 35 years grant writing experience
- 25 years grant admin experience
- Just the Right Size
- Senior Level Commitment
- Long Term Relationship



# Organizational Structure

# Organizational Chart

Including all subcontractors



Most GMA Associates are cross-functional and may serve in multiple capacities but are only listed once in the chart under their primary designation



# Use of Subcontractors

GMA Employs Subcontractors in the following fields:

- ▶ Regulatory Permitting
- ▶ State and Federal Lobbyist
- ▶ Engineering Firms
- ▶ Transportation and Land-use Planners
- ▶ IT Specialists

*We have long term  
established  
relationships with  
our subcontractors*



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# Vetting of Subcontractors

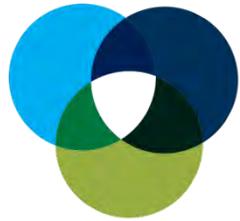
For new subcontractors we hire primarily off of referrals and recommendations.

- ✓ Resume with Referrals
- ✓ Writing Samples
- ✓ Three Recommendations
- ✓ Signed Non-Disclosure



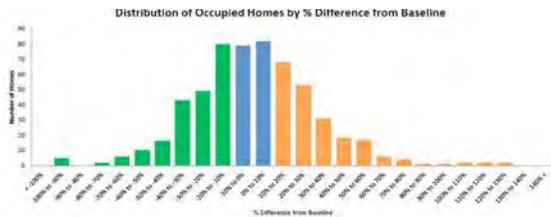
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# Training/Management/Quality Control



## Training

New Associates mentor under a GMA senior associate for minimum of 3 months prior to working as a team lead



## Management

Senior Associates are the primary point of contact for all GMA clients. Junior Associates work under their supervision and daily direction



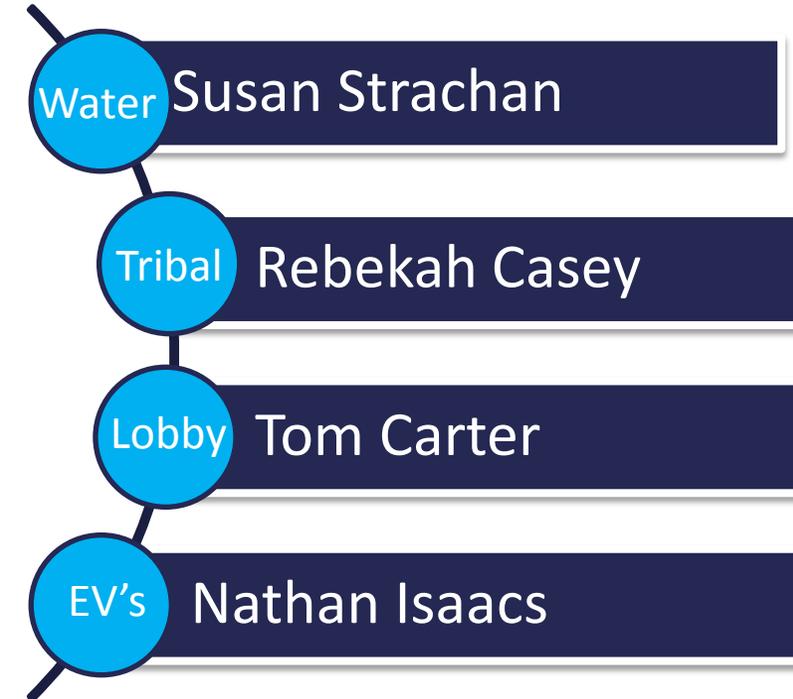
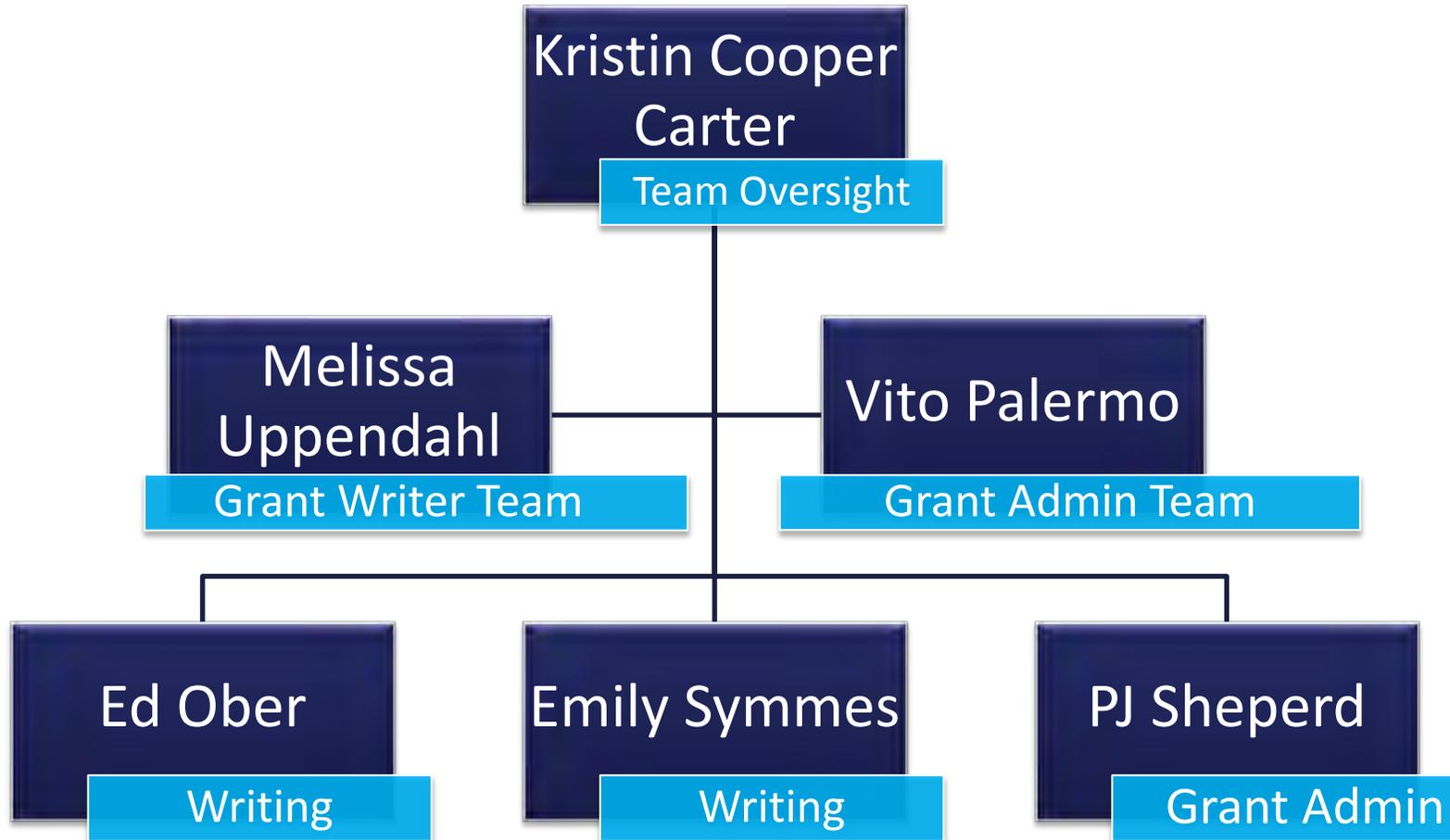
## Quality Control

GMA Owner oversees all correspondence with every client. Any issues of concern that arise are addressed by the firm owner



# County of El Dorado Team

# EDC Team Overview



# Background and Experience

## Kristin Cooper-Carter, M.A.



- ▶ Over 25 years experience as a grant developer, technical writer and project manager
- ▶ M.A. in Program Evaluation and Administration & Organizational Management
- ▶ Established GMA in 2009 – securing over \$150 million in grants to date
- ▶ Past Director of Environmental Programs and past professor for the College of Engineering
- ▶ Served on many non-profit boards
- ▶ Expert in sustainable building



# Background and Experience

## Susan Strachan, M.A.



- ▶ 20 years in water programs, grant writing, program development
- ▶ Infrastructure, urban storm water, riparian and wetland habitats, water supply policy
- ▶ Primary grant author for over \$5M successful funding applications
- ▶ Trained facilitator, co-chaired consensus group for wetlands, riparian areas, watershed
- ▶ Served on many non-profit boards
- ▶ B.A. in Economics M.A. in Geography & Environmental Planning



# Background and Experience

## Melissa Uppendahl, MPA



- ▶ Over eight years experience in project management and grant writing
- ▶ BS in Business Administration, Masters Public Administration - Environmental Policy
- ▶ Primary GMA grant writer for Chevron Energy Solutions K-12 programs
- ▶ Expert in California's AB 32 Global Warming Solution Act and transportation policy
- ▶ Student organizer at St. Mary's College Center for Social Action
- ▶ Located in South Lake Tahoe, California



# Background and Experience

## Vito Palermo, MBA



- ▶ Accomplished business executive in computing systems, networking & communications
- ▶ 25 years of experience, 10 years as a C-level executive in public companies
- ▶ Primary grant administrator for Association of Bay Area Governments CEC grant
- ▶ Specializes in innovative technology startups, rapid growth mid-size companies
- ▶ Development of companies with annual revenues of \$600M to \$2.2B
- ▶ Raised approximately \$1B in private and public equity; \$12B shareholder value



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# Background and Experience

## Rebekah Casey, MPA

- ▶ Over 10 years of technical writing, grant writing and program management
- ▶ Coordination of complex multi-million dollar, multi-year research projects
- ▶ Grant reviewer for the State of California
- ▶ Chair of the Butte County Federal Resource Advisory Committee
- ▶ Broad background in community development
- ▶ B.S. in Physics and MPA in Environmental Policy and Planning



# Background and Experience

## Emily Symmes, M.S., Ph.D



- ▶ 10 years experience in biological research, analysis, and agriculture
- ▶ Co-authored a number of peer-reviewed publications in the area of natural sciences
- ▶ Secured federal, state, and commodity-based funding for university and private research
- ▶ Collaborated with agricultural professionals, university researchers, & government
- ▶ MS and PhD degrees in Entomology from the UC Riverside and Davis



# Background and Experience

## Nathan Isaacs, MBA

- ▶ Expert in transportation EVSE and electric vehicle (EV) industries
- ▶ Involved in the rollout of Evs since 2008 – helping new companies enter the market
- ▶ Negotiated demonstration projects with the City of Beaverton, Ore., and with PSU
- ▶ Career spans more than 20 years working in the public and private sectors
- ▶ A decorated U.S. Navy submarine sailor
- ▶ B.A. in communications/editorial journalism and holds an MBA



# Background and Experience

## Edward Ober, B.A.

- ▶ Experienced grant writer, program developer, development specialist
- ▶ Grant efforts include Federal, State, Local and Foundation grants
- ▶ Over \$15M in grant awards
- ▶ Program development in employment, immigration, housing, economic development
- ▶ Experienced in advocacy, responsible for CA SB-8 (2011-12)
- ▶ Served on nonprofit board of directors assisting with board development



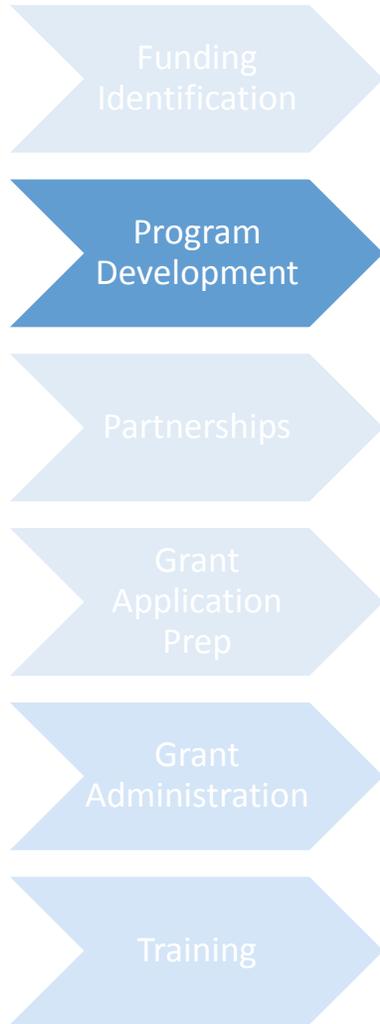
# County of El Dorado Approach

# GMA Systems

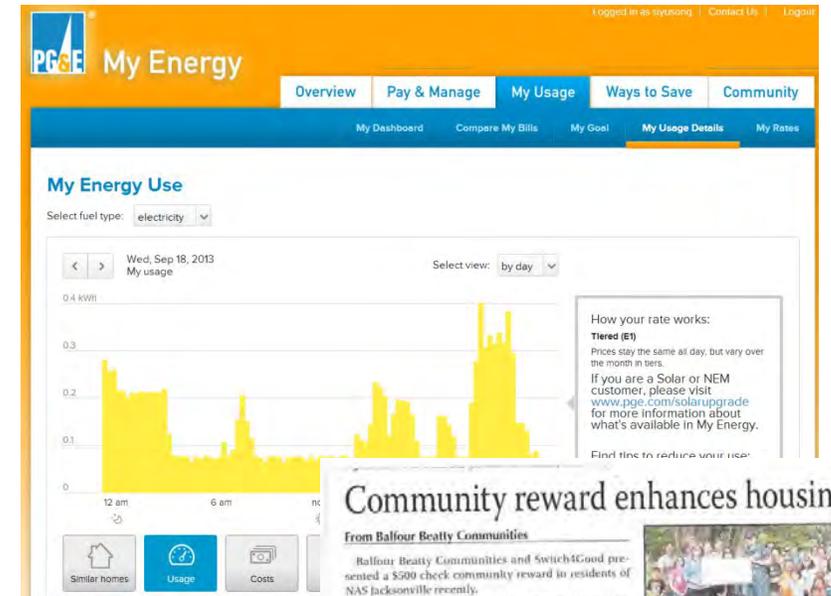
- Grant Writing System** > Customized Approach. One size does not fit all
- Grant Management System** > Individually designed per funder requirements & client needs
- Data Backup** > Secure cloud based backup through Dropbox.com
- Data Recovery Procedures** > Double backup through Google Docs/gmail.com and Box.net



# Program Development



- ▶ Regional Collaboration
- ▶ Size and Scope of Projects
- ▶ Davis Bacon Wage Compliance



## Community reward enhances housing areas

From Balfour Beatty Communities

Balfour Beatty Communities and Switch4Good presented a \$500 check community reward to residents of NAS Jacksonville recently. The \$500 grant was awarded to residents for achieving a 20 percent participation in the Switch4Good program and will be used to install doggie post stations and picnic tables on base. The Switch4Good program is designed to help residents of Balfour Beatty Communities conserve energy and earn money back for low utility bills.



Photo courtesy of Balfour Beatty Communities

Diana Heintz, community manager for Balfour Beatty Communities, presents a check for \$500 to NAS residents during the annual "Room to Bloom" event in April.

The program is designed to help residents of Balfour Beatty Communities conserve energy and earn money back for low utility bills. The program is initiated by Switch4Good. The challenge runs through June. For more energy savings information, like the Switch4Good Facebook page.

**City Programs Roadmap**

WattzOn Lead: Jon Enberg  
Energy Champion: XXXXXXXXXXXXXXXX  
City Staff Lead: [Blank]  
City Biz Lead: [Blank]  
Date: 19 September 2013

Review Team: Martha Amram, Jon Enberg, Energy Champion  
Next Review: 9/30/13

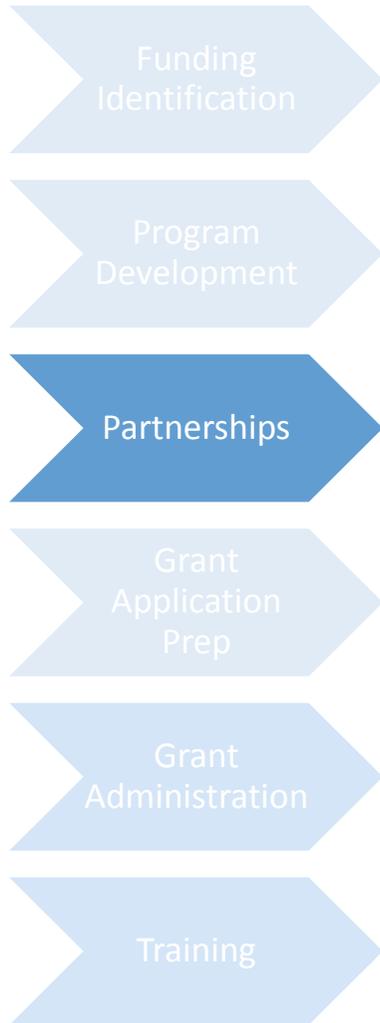
Core Objectives: Launch Phase II in XXXXXXX

Task#	Task	Owner	Program	TTL	Phase	Timeline												Status (Past Due in Red)	Metrics
						Original Plan	Complete	2013	2014										
101	Identify program scale & program elements	Jon, Lauren	PM	T-3		X													
102	Identify POC for each element	Jon, Lauren	PM	T-3		X													
103	Finalize scope of work and VOICES contract	Jon, Lauren, Martha	PM	T-3															
104	Identify city POC for web content	Jon/Sales	CPV	T-3		10%													
105	Need city-specific program names	Jon/Sales	CPV	T-3															
106	Get city logos and emblems to use on website	Jon/City	CPV	T-3															
107	Get 4 utility accounts to test WattzOn website agent if not on system yet	Jon	CPV	T-3		X													
108	Once 3+ have signed up at WattzOn, let Steven know	Jon	CPV	T-3															
109	Identify non-profit to assist in Home Coaching outreach (if applicable)	Jon	HC	T-3															
11	Adapt HC protocol & report to local utilities, rebates and other factors	Jon/Kate	HC	T-3															
111	Identify teacher and staff member to lead school programs	Jon	SI	T-3															
112	Identify business community leaders for Rewards	Jon	R	T-3															
113	Lay out modules and start dates, tailored to local calendar and interests	Jon	SI	T-3															
114	Setup meeting to introduce program to key biz partners	Jon	R	T-3															
115	Identify business community leaders for SBES	Jon	SBES	T-3															
116	Adapt content of CPV/welcome page to city	Jon/Andrea	CPV	T-3															
117	Develop city-specific welcome page to WattzOn.com	Steven	CPV	T-3															
118	Develop city-specific private label version of WattzOn.com	Steven	CPV	T-3															
119	Present initial version of site for city approval (10 calendar day review)	Jon/City	CPV	T-3															
12	Present initial version of site for CES approval (10 calendar day review)	Jon/Lauren	CPV	T-3															
2.01	Meet with Chamber of Commerce - identify potential SMBs (3) for Rewards	Jon	R	T-2															
2.02	Review outreach material and approve city logo use	City	R	T-2															
2.03	Meet with Chamber of Commerce - identify potential SMBs for SBES (5)	Jon	SBES	T-2															

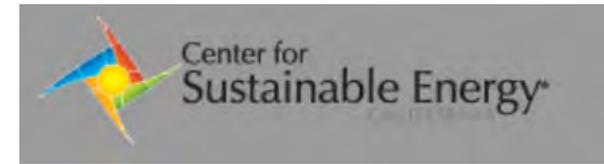


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# Partnerships



**GMA brings to the table a number of established partnerships that may potentially benefit El Dorado County**



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# Example Grant Applications

## Economic Development Grant Example



Funding Identification

Program Development

Partnerships

Grant Application Prep

Grant Administration

Training

**AltAir Fuels, LLC** ➤ California's first commercial scale renewable diesel facility

**CEC PON 11-601** ➤ \$6M Grant - \$20.6M match

**Job Creation** ➤ 58 temporary jobs and 153 full time jobs

**Repurpose** ➤ Convert existing equipment to 1,500 BPD biofuel facility



# Example Grant Applications

Funding Identification

## Parks and Recreation Grant Example

Program Development

**Verbena Fields** ➤ Habitat restoration on land impacted by gravel mining

Partnerships

**SWRCB Grant** ➤ \$907,000 for construction and restoration planting

Grant Application Prep

**Collaboration** ➤ City, Watershed Alliance, local Tribes , CSU Chico and more

Grant Administration

**Community Impact** ➤ Volunteer opportunities, habitat restoration, education

Training

Big Chico Creek Watershed Alliance



# Example Grant Applications



Bringing Change Through Video  
One Media Player Per Teacher

Funding Identification

## Arts and Culture Grant Example

Program Development

**OMPT**



Low-Cost, Self-powered audio-visual learning tools

Partnerships

**USAIDs**



Teaches vital skills in farming, healthcare, and more

Grant Application Prep

**Collaboration**



Blending technology with high quality education

Grant Administration

**Community Impact**



Impacting some of the worlds poorest communities

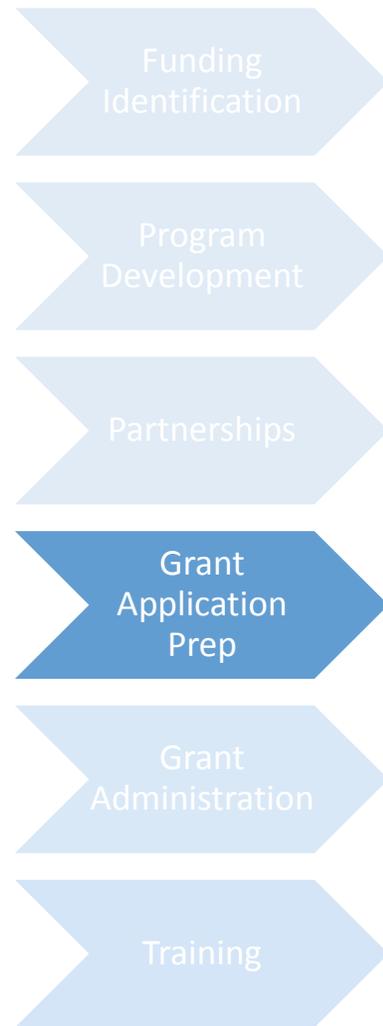
Training



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# Grant Application Preparation



## GMA Grant Stats – Past 5 Years

<p><b>244</b> Applications Prepared</p>	<p><b>168</b> Awards Received</p>	<p><b>33</b> Pending</p>
<p><b>\$80,000 - \$250,000</b> Average Grant</p>	<p><b>59 Hours</b> Prep Time</p>	<p><b>100%</b> Team Effort</p>



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# SAMPLE PROJECT LIST

Project Name and Partners	Scope	Top Potential Funding Sources	Dates LOI Submitted	Full Application	Comments	GMA Action Items	CES Action Items
Curriculum Development El Dorado High School	Envision - lighting, meteorology, solar	Bechtel Foundation; RGK Foundation	5/7/13 - RGK 4/16/13 - Bechtel		RGK - Heard back from RGK and we were not invited to submit full application. As of 5/31/13 we have not heard back from Bechtel	<ul style="list-style-type: none"> <li>Prepare updated slide deck with new opportunities.</li> </ul>	<ul style="list-style-type: none"> <li>Determine if District is interested in pursuing Lowe's opportunity</li> <li>Determine if NSF opportunity is good fit</li> </ul>
Building Upgrades at El Dorado County Elementary School	Envision - solar, lighting, EE upgrades	Agilent (CES ID'd and submitted); Verizon Foundation; Lockheed Martin; Computers for Learning Program; Lowe's Toolbox for Education, Wells Fargo Corporate Giving	[Date]- Agilent (by CES); 4/18/13 Stater Brothers		Pursued Verizon Foundation, but no local funding is available at this time. Pursuing Lowe's grant; Prop 84 funding; Lights for baseball fields funding, etc.	<ul style="list-style-type: none"> <li>Send updated version of Lowe's application by 9/27 with follow up items;</li> <li>Begin prep work for Baseball lights grant; interest in SRTS grant</li> </ul>	<ul style="list-style-type: none"> <li>Pyle is meeting with Lowe's representative on 09/30</li> <li>[Tentative] t/c 09/30 @4pm to determine if we are going forward with Prop 84 Stormwater grant</li> </ul>
Water Conservation Project and Education Program	TBD	Loca Foundation for Innovation, Lockheed Martin Corporation Foundation, PG&E Bright Ideas Grants, Lowe's Toolbox For Education, Google Rise, Toyota USA Foundation			Template LOI provided 5/6/13.	<ul style="list-style-type: none"> <li>Preparing DOE SSP application due 9/18/13</li> <li>District also interested in Motorola, State Farm and Lockheed grants.</li> </ul>	<ul style="list-style-type: none"> <li>Follow up call on SSP on 09/30</li> <li>Determine if Prop 84 Stormwater grant w/b appropriate</li> <li>Review NSF Discovery research grant for potential fit.</li> </ul>

# SAMPLE FUNDING MATRIX (A)

Category	Opportunity	Purpose	Eligibility	Funding	Due	Contact
<b>Energy Efficiency- Building design, upgrades, solar, HVAC, Energy Management Systems, Cool Roofs</b>						
<b>Energy Projects for communities with high energy needs</b>	<b>USDA High Energy Cost Grant Program</b>	Grants under this program may be used for the acquisition, construction, installation, repair, replacement, or improvement of energy generation, transmission, or distribution facilities in communities with extremely high energy costs. On-grid and off-grid renewable energy projects, and energy efficiency, and energy conservation projects are eligible.	Persons, States, political subdivisions of States, and other entities organized under the laws of States	Up to \$1M	<b>9/3/2013</b>	<a href="#">Link</a>
<b>Lights for Baseball Fields</b>	<b>Major League Baseball - Baseball Tomorrow Fund</b>	The Baseball Tomorrow Fund (BTF) awards grants to non-profit and tax-exempt organizations involved in the operation of youth baseball and/or softball programs and facilities.	Awarded to nonprofits. •Grants are intended to provide funding for incremental programming and facilities for youth baseball and softball programs, not for normal operating expenses or as a substitute for existing funding or fundraising activities. •The funds may be used to finance a new program, expand or improve an existing program, undertake a new collaborative effort, or obtain facilities or equipment necessary for youth baseball or softball programs. •Grants are designed to be flexible to enable applicants to address needs unique to their communities.	Average \$35,000	<b>January 1, April 1, July 1 and October 1 annually</b>	<a href="#">Link</a>

# SAMPLE FUNDING MATRIX (B)

History / Arts / Culture	Public Facilities & Maint.	Economic Development	Community Planning / Design	Education	Housing	Environment	Transportation Infrastructure	Public Health / Mental Health	Social Services	Energy	Law Enforcement / Emergency Services	Technology Development	Other Areas of Interest	Grant Opportunity Name	Purpose(s)	\$ Range	App. Due	Link	Eligibility / Notes	
														History, Arts and Culture						
*			*											National Archive, Presidential Libraries	Multiple grants available	Gold-Rush Era Document / Treasure Preservation	varies, up to \$200K	varies, annual	<a href="#">Link</a>	
*	*		*						*				*	Forest Service	Community Forest and Open Space Program	Support for forests that provide community benefit, education, culture	<\$4M	1/15/2014	<a href="#">Link</a>	
*			*										*	National Endowment for the Humanities	Sustaining Cultural Heritage Collections	Preserve and archive historical, cultural, or art collections, make public	<=\$350,000	12/3/2013	<a href="#">Link</a>	
*			*										*	National Archive and Records Administration	Documenting Democracy Access to Historical Records Project	Promote the preservation and use of the nation's most valuable archival resources. Projects should expand our understanding of the American past by facilitating and enhancing access to primary source materials. The Commission will support such activities as establishing archives programs, processing archival collections at the basic or detailed levels, surveying and accessioning archival records, and converting existing archival collection finding aids to new online formats.	<=\$200,000	10/3/2013	<a href="#">Link</a>	
*			*										* *	National Archive and Records Administration	Innovation in Archives and Documentary Editing	exploring innovative methods to improve the preservation, public discovery, or use of historical records. Projects may also focus on techniques and tools that will improve the professional performance and effectiveness of those who work with such records, such as archivists, documentary editors, and records managers. Projects must anticipate results that will affect more than a single institution or a single state. Projects may focus on methods of working with records in any format, including born-digital records. Projects designed to publish historical records must focus on innovative methods of presenting archival records as primary sources.	<=\$150,000	10/3/2013	<a href="#">Link</a>	
*													*	National Park Service	2014 Preservation Technology and Training Grants	funding for innovative research that develops new technologies or adapts existing technologies to preserve cultural resources. NCPTT does not fund "Bricks and Mortar" grants.	\$5K - \$40K	11/19/2013	<a href="#">Link</a>	
			*						*	*			*	NIH	2014 NIH Pioneer Award Program (DP1)	The NIH Pioneer Award initiative complements NIH's traditional, investigator-initiated grant programs by supporting individual scientists of exceptional creativity who propose pioneering and possibly transforming approaches to addressing major biomedical or behavioral challenges that have the potential to produce an unusually high impact on a broad area of biomedical or behavioral research. To be considered pioneering, the proposed research must reflect substantially different scientific directions from those already being pursued by the investigator's research program or elsewhere.	\$500k	10/9/2015	<a href="#">Link</a>	County governments eligible

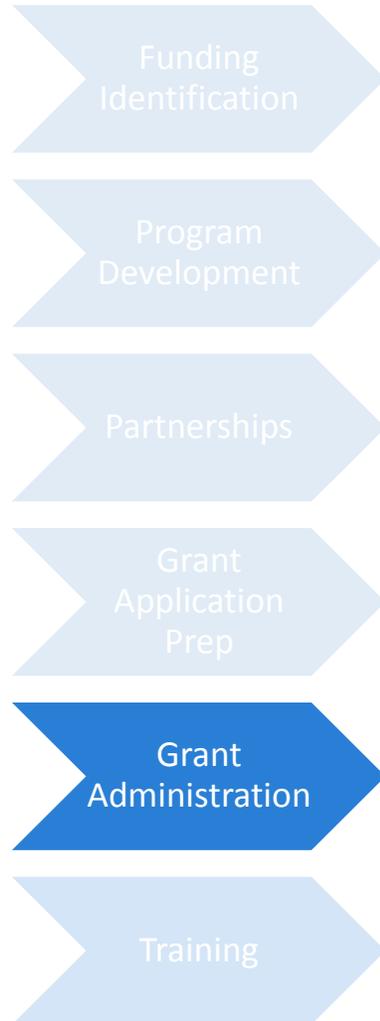
# U.S. Department of Homeland Security/



- **Opportunity:** FY 2013 Flood Mitigation Assistance Grant Program
- **Description:** Provides funding to States, Territories, Tribal entities and communities to assist in their efforts to reduce or eliminate the risk of repetitive flood damage to buildings and structures insurable under the National Flood Insurance Program (NFIP). Eligible activities include:
  - Property Acquisition and Structure Demolition or Relocation
  - Structure Elevation
  - Dry Flood-Proofing
  - Minor Localized Flood Reduction Projects
  - Hazard Mitigation Planning (Flood Portion)
  - Non-structural Retrofitting of Existing Buildings and Facilities
  - Management Costs
- **Eligibility:** Entities eligible to apply for include the emergency management agency or a similar office of the 50 States.
- **Grant Amounts:** \$120M total allocation (35 awards anticipated)
- **Due Date:** October 18, 2013
- **Link:** <http://www.grants.gov/search/synopsis.do;jsessionid=21ZVRw7cmPBJK1gyz2LhLZ4Fh2LpJInCwK8yjV12G057e2Qz9s!-226921036>

S A M P L E

# Grant Administration



## Grant Management

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- ✓ Reporting
- ✓ Invoicing
- ✓ Close-Out

## Multiple Departments

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- ✓ Process
- ✓ Organization
- ✓ Systems

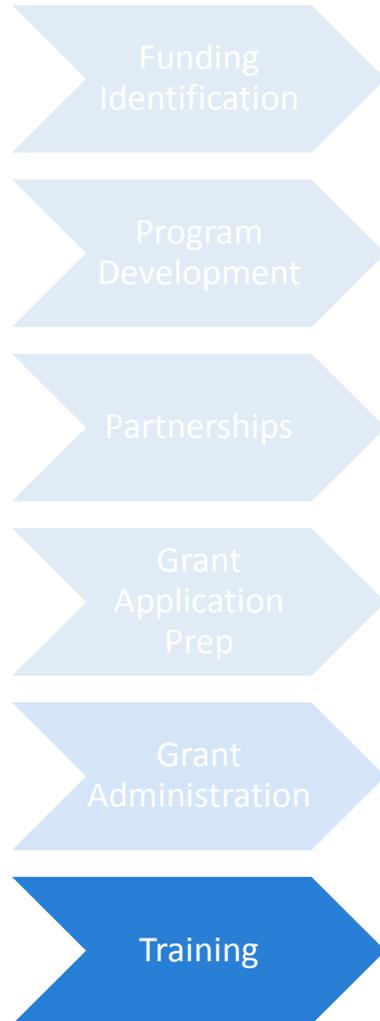
## Compliance

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- ✓ Pre-Award
- ✓ Post-Award
- ✓ Follow-up



# Training County Staff



## FOUR TRAINING MODULES

1. Grant Writing
2. Program Evaluation
3. Funding Identification
4. Grant Management

## UNIVERSITY COURSES

- University–Level Courses
- Hands-On
- Interactive
- Advanced

## TAILORED TO NEEDS

- Tailor to County Needs
- Cross-Departments
- All skill levels

## EXPERIENCE

- 12 years professor
- Writing Proficiency Class
- Conferences
- Specialized Workshops



# Grant Writing Fees & Costs

- ▶ Flat Rate Structure: \$4,800 per month
- ▶ Hourly Fee Structure

<b>\$135-\$150</b> Project Manager/Owner	<b>\$110-\$130</b> Senior Associates
<b>\$95-\$105</b> Junior Associates	<b>\$80-\$95</b> Admin Staff



# Closing Thoughts

- ▶ High Quality, Personalized Service
- ▶ Low Price
- ▶ Tailored Grant Development Strategy
- ▶ Broad Range of Expertise
- ▶ Women-Owned Certified Small Business
- ▶ **Local**





Grant Management Associates