

Appendix A: Templates and Worksheets

To download many of the templates and worksheets from this book, go to www.wiley.com/go/educationgrants

Project or Program Planning Template

This planning template can be used during the initial stages of the grant-writing process to formulate your ideas. If you are working with a team, have each member complete this template individually and then bring to the first meeting to guide your discussion.

Identify a Problem or Need

Conduct research about the problems you see in your classroom, school, district, or community.

Example: Forty percent of ninth-grade students are not on track to graduate within the Dale County School District.

What is your problem or need?

Goal

Goals are long-term, overarching targets that can be reached by continuous dedication and perseverance. Most classroom grants under \$5,000 will not ask you for an overarching goal; rather, specific objectives.

Example: The Dale County School District will have 85 percent of all ninth-grade students on track to graduate within two academic years as measured by state requirements.

What is your goal?

Objectives

Objectives are outcomes that can be measured within a given time frame. A series of objectives help you keep focused and strive for the overall goal.

Refer back to chapter 3 for the five essentials for writing objectives:

- Alignment
- Participants
- Time
- Results
- Measurable

Example: Ninety percent of ninth-grade students will pass all their academic courses during the first semester.

What are your objectives?

Project or program

The project or program is the step-by-step plan that you and your students or the school district is going to take in order to meet each objective and your overall goal. What specific lessons or programs will you implement to meet your objectives? What strategies and resources will be used in order to attain your desired outcomes?

Example: Students who are identified as at-risk for not being on track to graduate on entering ninth grade will participate in a weekly mentoring session with a ninth-grade teacher. These mentoring sessions will be used to monitor student behavior, work on homework or projects, and provide incentives for attendance and grades.

What are some components of your project or program?

Proficient Example: Needs Statement

Read the following needs statement, written in 2008 by undergraduate students on the campus of Illinois State University in conjunction with UNITE and the Chicago Teacher Education Pipeline. Then complete the needs statement checklist using evidence from the example, which is a section of a larger grant.

The root problem our proposal will address is the widening of the achievement gap and low representation of low-income minority students in higher education. To effectively serve the state of Illinois in the future, higher education as a whole must adapt to the increasing diversity of the state's college-bound population. By 2014, historically underrepresented groups will comprise approximately 40% of the high school graduating class, compared to 29% in 2001–02. The Black, non-Hispanic, college-age population will remain largely stable while the number of Hispanic graduates will double. Moreover, the National Center for Educational Statistics reports substantial gaps in educational attainment across income and ethnic groups (Horn & Berger, 2004). These gaps demonstrate the need for institutions to address both access to and retention in higher education for underrepresented groups.

Research has identified common obstacles to academic achievement for first-generation college students. These obstacles include lack of self-confidence (Terenzini et al., 1996), inappropriate expectations about college (Werner-Smith & Smolin, 1995), lack of connection to the college community and validation from it (Garcia, 2001), limited cultural context (Garcia, 2001), and limited support from family members who also do not understand college requirements and expectations (Brazziel & Brazziel, 1995). According to Mow and Nettles (1990), attitudinal factors and college experiences relate to student success, particularly for African American students.

Needs Statement Checklist

- Clear explanation of the problem or challenge facing the proposer*

Evidence from text:

- Insight into the classroom, school, and community with current student and school data*

Evidence from text:

- Anecdotal evidence that allows the reader to connect to the proposer's students and school*

Evidence from text:

- Data and research to support the problem, challenge, and anecdotal evidence*

Evidence from text:

- Connection to a larger-scale problem or consequence*

Evidence from text:

Example of a Likert Survey Template

Title of survey: _____

Directions to participant: Please respond to each of the following statements by circling one number from the columns on the right. Your responses will be anonymous and the results of your individual survey will not be included in the final report. All participant responses will be averaged together to assess the desired outcome.

Statements	Strongly agree	Agree	Neutral	Disagree	Strongly disagree
1.	5	4	3	2	1
2.	5	4	3	2	1
3.	5	4	3	2	1
4.	5	4	3	2	1
5.	5	4	3	2	1
6.	5	4	3	2	1
7.	5	4	3	2	1
8.	5	4	3	2	1
9.	5	4	3	2	1
10.	5	4	3	2	1
11.	5	4	3	2	1
12.	5	4	3	2	1
13.	5	4	3	2	1
14.	5	4	3	2	1
15.	5	4	3	2	1
16.	5	4	3	2	1
17.	5	4	3	2	1
18.	5	4	3	2	1
19.	5	4	3	2	1
20.	5	4	3	2	1

Thank you for your participation in this survey.

Practice Worksheet: Word Count I

Use the selected section of the following grant proposal to practice working on word-count requirements. The given proposal section has a total of 237 words, but the prompt states that the response should have a maximum of 200 words. Use the next page to rewrite the section using a maximum of 200 words. Make sure to still answer all components of the question prompt. Feel free to cross out words, use editing symbols, and make notes as you read and decide how to rewrite the proposal. These sections are adapted from a funded proposal written by elementary bilingual teacher and UNITE member Carmela Balice. You can find an example on page 153 of how this section was condensed to 200 words to compare with your revisions!

Prompt: Describe your classroom and your students. Identify a problem or need that your students face during the school day. Responses should not exceed 200 words.

My classroom consists of 26 third graders, 13 boys and 13 girls, all of whom are Hispanic. One student receives additional services in speech while another has a 504 Plan for an asthma related health condition. All of the students in my class are part of the free breakfast and lunch program. Due to the fact that my students are low-income, many of them eat the meals provided by the school which are not always the most nutritious. My students are only provided with physical education one time a week for forty minutes. In addition to this time, students are only allowed two days a week to have recess if classroom time permits. While at recess, students have no equipment to play with and spend most of the time sitting down due to boredom. The result of these factors is that my students are taking in unhealthy amounts of fat and sugar while having few options to exercise and ensure their healthiness. If granted the money to complete this project, students will be given more opportunities to be active during recess. Equipment will be provided to students in order for them to participate in both educational and team building related games which will encourage them to be more active. If students are encouraged to be more active and have fun in the process, they will develop healthy lifestyle habits and will continue these habits long into their future.

Practice Worksheet: Word Count II

Use the selected section of the following grant proposal to practice working on word-count requirements. The given proposal section has a total of 223 words, but the prompt states that the response should have a maximum of 200 words. Use the next page to rewrite the section using a maximum of 200 words. Make sure to still answer all components of the question prompt. Feel free to cross out words, use editing symbols, and make notes as you read and decide how to rewrite the proposal. You can find an example on page 154 of how this section was condensed to 200 words compare with your revisions!

Prompt: How will your project be measured using data? Please describe how you will determine the success of your project or program. Responses should not exceed 200 words.

Project PLAY incorporates student learning outcomes that are measurable and can be supported with data. The learning outcomes will be measured by surveying students, teachers, and parents. In order to provide aggregate data from Project PLAY, a survey will be taken by students and teachers prior to the project and after the completion of the playground. Participants will rate statements concerning the impact of the playground space on students. These statements will be answered using a 1–10 Likert scale where participants will agree or disagree with each statement. Participants will be surveyed on topics concerning active engagement, conflict resolution skills, academic skill development, and safety of activities during recess. These surveys will be used to gather data in order to determine the impact Project PLAY had on students. The teachers' responses will be measured as one subgroup and the students as another. Once Project PLAY has been completed, teachers and students will be asked to complete an identical survey. These responses will then be gathered and the data will be placed into a bar identical to the first. After comparing the responses, the data will indicate that the improvement in the recess area had a positive impact on both students and teachers. Using this data will demonstrate the positive impact Project PLAY had on both the students and teachers throughout the school.

Practice Worksheet: Needs Statement

Use the following school and classroom facts to create a needs statement in response to the given prompt. Refer back to the needs statement checklist from chapter 3, which is restated in the following. Make sure that your needs statement has all five components from the checklist. Feel free to provide other information, such as anecdotal evidence or specific percentages, not given in the following when writing your needs statement. You can find an example needs statement based on these same school and classroom facts on page 155. Compare your needs statement to this example when you are finished!

School and classroom facts	Needs statement checklist
<ul style="list-style-type: none"> ● High-needs, urban school in New York, NY ● Special education teacher ● Three different periods of the day ● Twenty-nine total students ● Students in grades 6, 7, and 8 ● All students are below reading level; most are three to four grade levels behind. ● Students are disengaged due to a lack of age-appropriate and interesting reading texts for middle school students that they can read with accuracy and fluency. 	<ul style="list-style-type: none"> <input type="checkbox"/> Clear explanation of the problem or challenge <input type="checkbox"/> Insight into the classroom, school, and community with current student and school data <input type="checkbox"/> Anecdotal evidence that allows the reader to connect to the proposer's students and school <input type="checkbox"/> Data and research to support the problem <input type="checkbox"/> Connection to a larger-scale problem or consequence

Prompt: Describe your classroom. What needs do your students have? How will your project address those needs?

Practice Worksheet: Budget Categories: Fourth Period

The following items represent line items that need to be included in a budget proposal. Correctly place each line item in the appropriate section of the budget shown on page 150. Compare your results to the example provided on page 157.

Items

- | | |
|---|--|
| <ul style="list-style-type: none">• 16 boxes of copy paper—\$13.00/box• Bus rental – Acme Charters—\$1,000*• Mentor teacher stipend—\$2,300• Postage and envelopes—\$150• 4 steel work tables—\$250 per table | <ul style="list-style-type: none">• 1 high-output copy machine—\$3,000• Assorted hand tools—\$700• Assorted lumber—\$550• Catering for exhibition—\$400• Indirect costs to school—7.0 percent of total |
|---|--|

* Similar to a real scenario, some assumptions must be made when filling in missing information. For example, the bus rental is an estimate as well as catering. In this example, the applicant simply listed a conservative estimate of how much those items will actually cost and budgeted accordingly.

Practice Worksheet: Ledger Activity: Fifth Period

Correctly place the following items into the ledger on page 152. Follow the example provided in chapter 5. Compare your results to the example provided on page 160.

Transactions

- On Oct. 1, you receive your first of two checks from your funder for \$17,000.
- You order volleyball uniforms for \$4,597 from LaDon's Closet on Oct. 6.
- On Oct. 7, you purchase forty volleyballs from Sports Inc. for \$417.
- You receive the uniforms previously purchased on Oct. 28.
- You pay a deposit of \$600 for a gym rental at the YMCA on Nov. 3 for an upcoming conference.
- You purchase \$1,000 worth of concessions goods to be sold at the conference on Nov. 3.
- On Nov. 4, you pay for the buses for your school in the amount of \$700.
- A parent donates \$40 to the team as you get on the bus on Nov. 6.
- At the conference (Nov. 6), you pay the remaining YMCA rental of \$5,400.
- At the end of the night, you pay staff who took tickets, work concessions, provided security, operated parking, and guided teams around to total \$5,000 (Nov. 6).
- You pay referees on Nov. 6 a total of \$1,500 for their services.
- On Nov. 7, you pay \$150 to the YMCA for a broken window your volleyball player made while practicing spikes against a wall.
- On Nov. 7, you deposit \$1,500 from concession sales.
- On Nov. 7, you deposit \$500 from ticket sales.
- On Nov. 15, you receive your second and final check from the funder for \$3,000.
- On Nov. 16, you throw a party for volleyball players and boosters to celebrate first place and spend \$676 on food and decorations.
- On Nov. 30, a check written by your administrator is paid to you for your hard work in the amount of \$2,000 using funds from this account. (Was it worth it?)

Date	Description	Credit	Debit	Balance

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Answer Worksheet: Word Counts I and II

Use the two passages below that have been trimmed down to meet the 200-word limit requirement. Compare these two sections to the practice word-count worksheets. Pay close attention to what was deleted or reworded in the following sections so that the question prompt was still fully answered. These sections are adapted from a funded proposal written by elementary bilingual teacher and UNITE member Carmela Balice.

Answer Worksheet: Word Count I

Prompt: Describe your classroom and your students. Identify a problem or need that your students face during the school day. Responses should not exceed 200 words.

My classroom consists of 26 third graders, ~~13 boys and 13 girls~~, all of whom are Hispanic. ~~One student receives additional services in speech while another has a 504 Plan for an asthma-related health condition.~~ All of the students in my class are part of the free breakfast and lunch program. Due to the fact that my students are low-income, many of them eat the meals provided by the school which are not always the most nutritious. My students are only provided with physical education one time a week for forty minutes. In addition to this time, students are only allowed two days a week to have recess if classroom time permits. While at recess, students have no equipment to play with and spend most of the time sitting down due to boredom. ~~The result of these factors~~ is that my students are taking in unhealthy amounts of fat and sugar while having few options to exercise and ensure their healthiness. ~~If granted the money to complete this~~ **MY project IS FUNDED**, students will be given ~~more~~ opportunities to be active during recess. Equipment will be provided to students in order for them to participate in both educational and team building related games ~~which will encourage them to be more active~~. If students are encouraged to be more active and have fun in the process, they will develop healthy lifestyle habits and will continue these habits long into their future.

Final Word Count: 199

Answer Worksheet: Word Count II

Prompt: How will your project be measured using data? Please describe how you will determine the success of your project or program. Responses should not exceed 200 words.

Project PLAY incorporates student learning outcomes that are measurable and can be supported with data. The learning outcomes will be measured by surveying students, teachers, and parents. In order to provide aggregate data from Project PLAY, a survey will be taken by students and teachers prior to the project and after the completion of the playground. Participants will rate statements concerning the impact of the playground space on students. ~~These statements will be answered~~ using a 1–10 Likert scale where participants will agree or disagree with each statement. Participants will be surveyed on topics concerning active engagement, conflict resolution skills, academic skill development, and safety of activities during recess. These surveys will be used to gather data in order to determine the impact Project PLAY had on students. The teachers' responses will be measured as one subgroup and the students as another. Once Project PLAY has been completed, teachers and students will be asked to complete an identical survey. ~~These responses will then be gathered and the data will be placed into a bar identical to the first.~~ After comparing the responses, the data will indicate that the improvement in the recess area had a positive impact on both students and teachers. Using this data will demonstrate the positive impact Project PLAY had on both the students and teachers throughout the school.

Final Word Count: 197

Answer Worksheet: Needs Statement

Use the following needs statement to compare with your needs statement from the practice worksheet. This needs statement was adapted from a grant proposal written by Rachel Perveiler, a special education teacher and UNITE member. Her project was fully funded by UNITE in 2011. Does Rachel's need statement meet all the requirements based on the following checklist? Does your needs statement reflect some components of Rachel's needs statement?

School and classroom facts

- High-needs, urban school in New York, NY
- Special education teacher
- Three different periods of the day
- Twenty-nine total students
- Students in grades 6, 7, and 8
- All students are below reading level; most are three to four grade levels behind.
- Students are disengaged due to a lack of age-appropriate and interesting reading texts for middle school students that they can read with accuracy and fluency.

Needs statement checklist

- Clear explanation of the problem or challenge
- Insight into the classroom, school, and community with current student and school data
- Anecdotal evidence that allows the reader to connect to the proposer's students and school
- Data and research to support the problem
- Connection to a larger-scale problem or consequence

Prompt: Describe your classroom. What needs do your students have? How will your project address those needs?

At Shepard Academy 55%, 64%, and 57% of sixth, seventh, and eighth graders respectively are reading below grade level. Shepard's network of nearby elementary schools averages 65% of students below grade level. Many students in New York require intense intervention to make reading gains. Students lacking reading ability inhibit growth during high stakes testing and even generations later, when students' families lack reading ability. According to Reading Rockets, "it is vital that children read a large amount of text at their independent reading level (with 95 percent accuracy)," to increase fluency, vocabulary, and comprehension. At Shepard, most public libraries, or homes, students struggle to locate age-appropriate texts with which they experience 95% accuracy.

As a special educator at Shepard Academy, I service 29 middle grade (6th, 7th, and 8th) students with Individualized Education Plans (IEPs), primarily with reading learning disabilities. Several of the students read successfully at Fountas and Pinnel levels H through L, which is comparable to the reading ability of a student in second or third grade. This is the cause for many struggles such as distractibility of self and peers, bullying, low motivation, lack of homework completion, and low grades. A clear solution to this problem is expanding Shepard's selection of high-interest, beginning-level reading books. Offering high-interest books at beginning reading levels is crucial for reading progress at Shepard.

Answer Worksheet: Budget Categories: Fourth Period

The following listed items represent line items that need to be included in a budget proposal. Correctly place each line item in the appropriate section of the following budget.

Items

- | | |
|---|--|
| <ul style="list-style-type: none"> • 16 boxes of copy paper—\$13.00/box • Bus rental – Acme Charters—\$1,000* • Mentor teacher stipend—\$2,300 • Postage and envelopes—\$150 • 4 steel work tables—\$250 per table | <ul style="list-style-type: none"> • 1 high-output copy machine—\$3,000 • Assorted hand tools—\$700 • Assorted lumber—\$550 • Catering for exhibition—\$400 • Indirect costs to school—7.0 percent of total |
|---|--|

Quantity	Description	Summary	Unit Cost	Total Cost
16	Box of copy paper	Used for printing	\$13	\$208
1	Assorted lumber	For building sets	\$550	\$550
1	Postage and envelopes	Mailings	\$150	\$150
			Supply total	\$908
1	Bus rental	Travel to regionals	\$1,000	\$1,000
1	Catering for exhibition	Food for main event	\$400	\$400
			Contractual total	\$1,400
4	Steel work tables	Used in set shop	\$250	\$1,000
1	Assorted hand tools	Hammers, screwdrivers, etc.	\$700	\$700

1	High-output copy machine	Program printing, invites, general use	\$3,000	\$3,000
			Equipment total	\$4,700
1	Mentor teacher stipend	Set building coach	\$2,300	\$2,300
			Personnel total	\$2,300
			Subtotal	\$9,308
			Indirect @ 7.00%	\$651.56
			Tax (Exempt)	0.00%
			Total	\$9,959.56

* Similar to a real scenario, some assumptions must be made when filling in missing information. For example, the bus rental is an estimate as well as catering. In this example, the applicant simply listed a conservative estimate of how much those items will actually cost and budgeted accordingly.

Answer Worksheet: Ledger Activity: Fifth Period

Correctly place the items below into the ledger. Follow the example provided in chapter 5.

Transactions

- On Oct. 1, you receive your first of two checks from your funder for \$17,000.
- You order volleyball uniforms for \$4,597 from LaDon's Closet on Oct. 6.
- On Oct. 7, you purchase forty volleyballs from Sports Inc. for \$417.
- You receive the uniforms previously purchased on Oct. 28.
- You pay a deposit of \$600 for a gym rental at the YMCA on Nov. 3 for an upcoming conference.
- You purchase \$1,000 worth of concessions goods to be sold at the conference on Nov. 3.
- On Nov. 4, you pay for the buses for your school in the amount of \$700.
- A parent donates \$40 to the team as you get on the bus on Nov. 6.
- At the conference (Nov. 6), you pay the remaining YMCA rental of \$5,400.
- At the end of the night, you pay staff who took tickets, work concessions, provided security, operated parking, and guided teams around to total \$5,000 (Nov. 6).
- You pay referees on Nov. 6 a total of \$1,500 for their services.
- On Nov. 7, you pay \$150 to the YMCA for a broken window your volleyball player made while practicing spikes against a wall.
- On Nov. 7, you deposit \$1,500 from concession sales.
- On Nov. 7, you deposit \$500 from ticket sales.
- On Nov. 15, you receive your second and final check from the funder for \$3,000.
- On Nov. 16, you throw a party for volleyball players and boosters to celebrate first place and spend \$676 on food and decorations.
- On Nov. 30, a check written by your administrator is paid to you for your hard work in the amount of \$2,000 using funds from this account. (Was it worth it?)

Date	Description	Credit	Debit	Balance
10/1/15	First installment – UNITE, NFP	\$17,000		\$17,000
10/6/15	Uniforms – LaDon's Closet		\$4,597	\$12,403
10/7/15	Volleyballs – Sports Inc.		\$417	\$11,986
11/3/15	Deposit for space – YMCA		\$600	\$11,386
11/3/15	Concession goods		\$1,000	\$10,386
11/4/15	Bus rental – School district		\$700	\$9,686
11/6/15	Parent cash donation	\$40		\$9,726
11/6/15	Space rental – YMCA		\$5,400	\$4,326
	Staff payments		\$5,000	(\$674)
	Referee payments		\$1,500	(\$2,174)
11/7/15	Broken window repair – YMCA		\$150	(\$2,324)
11/7/15	Concession sales revenue	\$1500		(\$824)
11/7/15	Ticket sales revenue	\$500		(\$324)
11/15/15	Second installment, UNITE, NFP	\$3,000		\$2,676
11/16/15	Celebration food and decoration		\$636	\$2,040
11/30/15	Coach's stipend		\$2,000	\$40