# 2018 Virtual GPC Study Group



Technology Coordinator

Planning
+
Face-to-Face
Virtual Live
+
Documentation
+
Self
Study

Study Group Facilitator

**The first nationwide Virtual Study Group of Grant Professional Association members**

# Contents

# Foreword

## Study Group Facilitator

**Katherine FH Heart, GPC, M.Ed., [Heart Resources, LLC](#)**
The following scenarios are drawn from those used in a GPC Study Group that I facilitated for the GPA-Western PA Chapter in 2016. The following scenarios should not be the only source of study materials and do not reflect the questions that will appear on the Grant Professionals Certified (GPC) exam. I make no guarantees about exam performance or results from studying these materials. Everyone who takes the exam must agree not to share specific questions or content from the exam. Each person comes to the GPC exam with their own set of experiences in the grant profession, and because it is a broad-based "generalist" exam, there are individual strengths and weaknesses to work on during study. For more information on my grant training experience, visit [Heart Resources Grant Training](#).

## Technology Coordinator

**JulieAnna Carsen, GPC, [JVG Synergy, LLC](#)**
This document is a summary of the content and information that was shared as a collaborative Google document amongst participants of the national virtual GPC study group that was conducted in early 2018. The scenarios and writing prompt in this document were not developed by the Grant Professionals Certification Institute and do not represent GPC exam content. In the future, study group facilitators can utilize the material in this document as a thematic representation of the types of skills and experience that are associated with the GPC competencies. Personally, I found the content to be a helpful conversation guide in a small group virtual learning environment. Listening to the experiences of grant professionals from across the nation gave me a new perspective of how the GPC competencies are applied in different contexts and what it means to be a generalist in this profession. A concept that I still struggle to comprehend at times. While the differences in our work is nuanced and vast, we can broaden our understanding of the grants profession by sharing the wisdom and lessons from our lived experiences.

For the credentialed folks reading this document, if you are interested in facilitating a face-to-face or virtual study group, I recommend starting a conversation in Grant Zone. The site now features a thread titled GPC Exam Prep, which is open to all GPA members. You track interest, create a study group and keep the conversation moving forward. For the non-credentialed reader who is interested in self-study materials, there is a list of resources (not exhaustive) at the end of this document which may be helpful.

01.

**Facilitating a Virtual Study Group**

# Study Group Meeting Schedule

Complete the recommended readings, participate in weekly web conference discussions to gain a deeper understanding of the types of questions in the GPC exam. Following each meeting, the study group facilitator will provide an example scenario on the next grant competency. Use the scenario to review and study throughout the week and discuss with colleagues during the next scheduled meeting. In the week prior to the last meeting, the facilitator will review one writing sample for each person in response to the final Writing Prompt, which is the only "assignment" where individual feedback will be provided. Then we will discuss the writing exam at the last meeting.

From Katherine: I want to reinforce the single best advice from my mentor (a GPC, former GPA Board Member) when I shared my worry about not being able to memorize and recall the many facts I was studying. I used her advice during my exam, and it helped to me remain focused and calm. She encouraged me to "recall my grant experiences" when responding to exam items. In each of the competency areas, this is what most people who have been accepted to sit for the exam can do because you have enough general grants experience to pass. If you do not have experience in a specific area, study and discuss it with others so you can recall that information for the exam.

> " Group discussions should not be the only resources referenced to study and prepare for the GPC Exam. "

This document is not affiliated with the Grant Professional Certifiation Instittute an does not represent or reproduce any material that may be on the Grant Professional Certification exam. To learn more about the scenarios that were discussed during the virtual study group held in 2018, contact Katherine Heart at www.heartresources.net/contact-us.

The following schedule reflects the ten-week weekly meeting schedule that was developed during the national study group that was held in early 2018. The weekly study group discussion topics were based on GPC competencies.

| Meeting | Date | Virtual GPC Study Group Structure and Content |
|---|---|---|
| 1 | 2/2 | Technology Coordinator hosted a web conference to establish a meeting schedule and platform and created a shared Google Doc. |
| 2 | 2/9 | Study Group Facilitator held an introductory session to meet attendees, answer questions about the GPC eligibility and exam process, and discuss readiness issues (costs and benefits, time for study). Posted Scenario #1 Funder Research. |
| 3 | 2/16 | Study Group Facilitator and group discussed Funder Research. Posted Scenario #2 Organizational Development. |
| 4 | 2/23 | Study Group Facilitator and group discussed Organizational Development. Posted Scenario #3 Good Project Design. |
| 5 | 3/2 | Study Group Facilitator, Topic Facilitator and group discussed Good Project Design. Posted Scenario #4 Grant Proposal Development. |
| 6 | 3/9 | **Study Group Facilitator and group discussed Grant Proposal Development. Posted Scenario #5 Post-Award Grant Management.** |
| 7 | 3/16 | Study Group Facilitator and group discussed Post-Award Grant Management. Posted Scenario #6 Ethical Practices and Scenario #7 Professional Practices. |
| 8 | 3/23 | Study Group Facilitator and Co-Facilitator discussed Ethical and Professional Practices. Posted Scenario #8 Funder Relations. |
| Off | 3/30 | Study Group Facilitator not available. |
| 9 | 4/6 | Study Group Facilitator and group discussed Funder Relations. Posted Scenario #9 Writing Prompt (Optional Writing Exercise) due 4/9 at 5:00 pm. Confidential written feedback provided. |
| 10 | 4/13 | Study Group Facilitator and group discussed strategies for the Writing Exam and test taking from Chapter 9 and 10 in Prepare for the GPC Exam. |

# 02.

Virtual Study Group Scenarios

# 02.

# Scenarios

Grant competency topics should be discussed during 40-60-minute meetings. During the 2018 Virtual GPC Study Group, meetings were conducted virtually through a teleconference platform from Feb 2-Apr 13, 2018 (Fridays, 2:00-3:00 PM EST).

**Virtual GPC Study Group | Scenario #1: Funder Research**

Review the GPCI Examination Competency and Skills: Knowledge of how to research, identify, and match funding sources to meet specific needs.

**INSTRUCTIONS**

Make your notes for the group discussion below. This is not a typical exam question. Identify (a) what techniques you would use to learn more about each grant opportunity; (b) the type of information you would need to collect; and (c) where you would find that information.

**Scenario**

The Executive Director of a nonprofit organization in your town providing early childhood and after school programs for at-risk youth and families gives you a list of possible funding sources and wants you to assess current open grant opportunities.

1.    U.S. Department of Health and Human Services
2.    Community Foundation (in Your Town)
3.    Fiskars' Project Orange Thumb
4.    County Department of Human Services
5.    A board member's friend has a donor-advised fund (DAF) at Fidelity Charitable® that gives annual grants to nonprofit organizations in your area.

This scenario was developed and posted by Katherine F.H. Heart, GPC, M.Ed. for grant training and study group discussion purposes only and bears no resemblance to actual GPC exam questions.

Review the GPCI Examination Competency and Skills: Knowledge of organizational development as it pertains to grant seeking.

**INSTRUCTIONS**

Make your notes for the group discussion below. This is not a typical exam question. Identify (a) what techniques you would use to learn more about each grant opportunity; (b) the type of information you would need to collect; and (c) where you would find that information.

**Multiple Choice Scenario**

As a grant consultant, you have contracted with a nonprofit organization to develop a federal proposal. The RFP fits the agency's mission and services. However, it is the largest amount and most complex proposal they have ever attempted at $500,000 annually for five years. The requirements are intimidating to staff.

Which are the most appropriate strategies for helping the staff?

1. Provide a list of electronic resources that staff can review and reference as they address various grant requirements.
2. Conduct a workshop with staff to provide an overview of the programmatic requirements.
3. Develop a matrix of applicable requirements with management strategies or action steps.
4. Meet with staff to determine whether an award so large would justify hiring a full-time management specialist.

A. 1 and 2
B. 1 and 3
C. 2 and 3
D. 3 and 4

This scenario was posted by Katherine F.H. Heart, GPC, M.Ed. for study group discussion purposes only and bears no resemblance to actual GPC exam. Scenario derived from GPC Candidate Information Guide, June 2012, p. 20.

Review the GPCI Examination Competency and Skills: Knowledge of strategies for effective program and project design and development.

**INSTRUCTIONS**

Discussion: What steps would you take in assisting the grant team to develop the project? How would you involve other stakeholders in new program development? What are the elements of an effective program design? Who needs to be involved in developing a realistic evaluation plan? What strategies are helpful in educating key personnel about financial and program accountability, and compliance with funder requirements?

**Multiple-Choice Scenario**

The Executive Director at a large health and human services agency sends you the Request for Proposals (RFP) for a new county-funded program center for transition-age at-risk youth, which is due in one month. The program director has recruited a staff grant team to assist in developing the new project and proposal.

What is the LEAST appropriate strategy for ensuring a strong program/project design?

1. Make a presentation to staff on the RFP requirements.
2. Identify community partners, hold a meeting to discuss roles and responsibilities, and request MOU.
3. Hold focus groups with youth to determine what services should be provided.
4. Even if not required, develop a logic model with staff to clarify their program decisions.
5. Bring in an evaluation consultant to help staff develop quantitative and qualitative objectives, outcomes, and measurement tools for data collection.

A. 1
B. 2
C. 3
D. 4
E. 5
F. None of the Above

This scenario was posted by Katherine F.H. Heart, GPC, M.Ed. for study group discussion purposes only and bears no resemblance to actual GPC exam.

Review the GPCI Examination Competency and Skills: Knowledge of how to craft, construct, and submit an effective grant application.


**INSTRUCTIONS**

Discussion: What are the elements of standard grant applications? What sources of data would be considered accurate and reliable? Is there a different writing style for federal vs foundation proposals? What steps must to be taken prior to submitting a federal grant application? How do you ensure all allowed items were included when developing the program budget? What is an indirect cost rate, and what is the difference between direct and indirect costs?


**Multiple Choice Scenario**

A nonprofit organization requests that you develop a proposal in response to a new federal initiative and recently released RFP. The type of grant is discretionary, and the announcement indicates that dozens of grants will be awarded to community-based agencies. Your agency is well-positioned in terms of mission, target population, and services. The following questions pertain to proposal development and submission.

1. What is the first step in preparing this type of proposal?
    A.    Create a checklist of all that must be included in the application.
    B.    Develop list of questions and ask funding agency's staff.
    C.    Thoroughly read all forms and instructions and pay close attention to those regarding format, length of each section, required style manual, overall number of pages, required content.
    D.    Develop an outline of the main points you want to make.
    E.    Contact subject matter experts who must provide you with information.

2. Which item contains the MOST comprehensive list of the standard parts of a federal application?
    A.    Project goals, objectives and activities; organizational background; project design and methods; narrative; action plans; timelines; personnel qualifications; budget; project evaluations; budgets; dissemination plans; future funding and sustainability statements; organizational information and capacity; attachments; standard assurance forms; executive summary
    B.    Target population; needs assessment and statements; project objectives; project designs and methods; project narratives; activities; action plans; timelines; project evaluations; budgets; dissemination plans; future funding or sustainability statements; standard assurances; abstract
    C.    Needs assessments and statements; project goals; project objectives; project designs and methods; project narrative; activities; action plans; timelines; personnel qualifications; project evaluation and methods; budget and budget justification; dissemination plan; sustainability statements; organization capacity; appendices, attachments; abstract
    D.    None of the above

This scenario was posted by Katherine F.H. Heart, GPC, M.Ed. for study group discussion purposes only and bears no resemblance to actual GPC exam.

Review the GPCI Examination Competency and Skills #5: Knowledge of post-award grant management practices sufficient to inform effective grant design and development.

**INSTRUCTIONS**

Discussion: What steps do you take after a grant is awarded to ensure that program/project staff understand and follow-through with activities and budget as planned? How would you handle the situation below if the grantmaker is a foundation versus federal government? How might you avoid this situation during proposal development?

**Multiple-Choice Scenario**

A youth-serving agency is awarded a one-year $75,000 grant to provide 100 transition-age youth with job readiness training and placement services. At six-months, only 25 youth have been trained and placed. The program director tells the grant manager that serving 100 youth this year is not feasible because the staff in charge of outreach resigned suddenly, and other staff had to be moved into job placement, which has slowed recruitment and training efforts.

The grant manager should advise:

1.    Stop the program, notify the funder, and offer to return unexpended funds.
2.    Continue the program and emphasize the positive impact on youth who were trained and placed in the final report.
3.    Continue the program and describe the problems encountered that resulted in lower performance in the final report.
4.    Contact the funder to explain the difficult situation and submit a revised plan.

A.    1
B.    2 and 3
C.    4
D.    None of the above. A different solution is needed for this situation.
E.    All of the above

This scenario was posted by Katherine F.H. Heart, GPC, M.Ed. for grant training and study group discussion purposes only and bears no resemblance to actual GPC exam questions. Scenario derived from GPC Candidate Information Guide, June 2012, p. 19.

Review the GPCI Examination Competency and Skills #6: Knowledge of nationally recognized standards of ethical practice by grant developers

**INSTRUCTIONS**

Discussion: As a grant consultant, what ethical problems might come into play when contacted to prepare a proposal for a second client for the same RFP or funding source? What are examples of unethical grant seeking, and what would you do if you observed a client agency engaging in such behavior? What actions can grant professionals take to avoid ethical violations?

**Multiple Choice Scenario**

A grant consultant is working with two nonprofits that provide services to transition-age youth. Both agencies have requested that you prepare a grant proposal to expand their workforce development training program to the same area foundation. The consultant has submitted proposals to the foundation several years ago. The consultant wants to ensure that the agencies fit with foundation priorities.

The BEST option is:

1.  Suggest that each of the agencies join forces and collaborate on the program request.
2.  Attend the foundation's public meeting in which they discuss guidelines and procedures.
3.  Ask the agencies to contact the funder on their own to check eligibility.
4.  Meet with the foundation's staff to discuss their current priorities.


A.  1
B.  2 and 3
C.  4
D.  None of the above.
E.  All of the above

This scenario was posted by Katherine F.H. Heart, GPC, M.Ed. for grant training and study group discussion only and bears no resemblance to actual GPC exam. Scenario derived from GPC Candidate Information Guide, June 2012, p. 21.

Review the GPCI Examination Competency and Skills #7: Knowledge of practices and services that raise the level of professionalism of grant developers.

**INSTRUCTIONS**

Discussion: How can you ensure that you are developing and/or maintaining current grant knowledge and skills?  What would you say if a friend asked you for advice on "how do I become a grant writer?" Why are terms like "grant professional" or "grant developer" preferred over "grant writer" by GPA and GPCI? What is "social capital?"

**Multiple Choice Scenario**

As a grant manager who has earned the GPC, you are reviewing resumes for a contractor to assist you in developing government proposals. Several candidates have certifications from different organizations.

How would you evaluate and verify their strengths, knowledge, skills and experience to choose the most qualified person?

1.  Review their resume for years of experience and list of awarded grants
2.  Check past references
3.  Verify grant credentials with GPCI
4.  Request a writing sample

A.  1
B.  2 and 3
C.  4
D.  All of the above

This scenario was posted by Katherine F.H. Heart, GPC, M.Ed. for study group discussion purposes only and bears no resemblance to actual GPC exam.

Review the GPCI Examination Competency and Skills #8: Knowledge of methods and strategies that cultivate and maintain relationships between fund-seeking and recipient organizations and funders.

**INSTRUCTIONS**

Discussion: What approaches have you used to develop a relationship with a new funder? How do you determine appropriate time and methods to contact a funder? How would you prepare staff for a site visit?

**Multiple Choice Scenario**

You have been hired as a grant manager at a large agency with multiple programs and numerous corporate, foundation and government funders. What methods would you use to develop relations with funders?

The BEST method(s) for developing relations with funders would be to:

1.    Send an email or letter to all funders to introduce yourself.
2.    Arrange meetings with all of the funders to discuss their current priorities.
3.    Introduce yourself at the next proposal submission or report.
4.    Pick up the day-to-day communications with funders as usual, and introduce yourself at first contact.

A.    1 and 2
B.    3 and 4
C.    None of the above.
D.    All of the above

This scenario was posted by Katherine F.H. Heart, GPC, M.Ed. for grant training and study group discussion purposes only and bears no resemblance to actual GPC exam questions.

Review the GPCI Examination Competency/Skill #9: Ability to write a convincing case for funding.

> 01.   Make a persuasive argument.
> 02.   Organize ideas appropriately.
> 03.   Convey ideas clearly.
> 04.   Use conventions of standard written English.
> 05.   Use information provided.
> 06.   Follow formatting guidelines.

**BACKGROUND AND INSTRUCTIONS**
by Katherine Heart, GPC, M.Ed., Study Group Facilitator

GPC exam scoring is reported as "Pass/Fail" for the multiple choice and written exams. Individuals must pass both sections to earn the GPC credential. To approximate the exam situation, set a timer for 90 minutes and stop writing immediately at the end of the allowed time. Follow the guidelines below in writing a persuasive argument for funding.*Return the entire document as a Word file to kheartwriter@gmail.com with "GPC Virtual Study Group Writing Exercise" in the Subject Line. You have from Friday April 6 until Monday April 9 at 5:00 pm to undertake the exercise.

For the purpose of improving the ability to write a convincing case for funding competency and skills, you will receive my feedback in the form of markups and scoring based upon the "Scoring Rubric for the Writing Sample" (pp. 23-35) in the Candidate Information Guide (GPCI, June 2012). I am not a GPCI test reviewer. I have experience using scoring rubrics to perform federal grant reviews and in judging federal award programs. I have provided grant training and proposal coaching as a GPA Approved Trainer.

My comments will be provided back to individuals via return email before the last session on Friday, April 13, 2018. The feedback will be private, confidential and specific to your writing sample. I will not share your sample for teaching purposes, and you do not have to share it with anyone. I make no claims or promises that my feedback will enable you to pass the writing exam.

WRITING PROMPT: The Foundation to End Homelessness is soliciting Letters of Inquiry as a preliminary step in providing grants of up to $25,000 for programs that help to solve the problem of homelessness in low-income neighborhoods in your town led by community nonprofit family and youth-serving organizations. Write a Letter of Inquiry that is no more than three typed pages with 1-inch margins, Times New Roman font and 12-inch type size.

**INSTRUCTIONS**

Begin the narrative exercise by creating an outline. Letters of Inquiry (LOI) are business letters. Consider how the question was framed and format accordingly. Open with eligibility criteria addressed and what qualifies your organization to apply. Write clear goal statements and understand how to qualify outcomes/output statements with numbers, percentages, etc. The Candidate Guide provides samples of levels of writing quality.

Provide a summary of your organization's best case for support that addresses the following:

1. Organizational Background
2. Neighborhood(s) Served, Population and Problems/Needs
3. Program Approach, Goals and Impact
4. Evaluation Plan and Outcomes
5. Requested Budget Expenses

This scenario posted by Katherine F.H. Heart, GPC, M.Ed. for study group discussion purposes only and bears no resemblance to actual GPC exam.

Answers to Scenario Sample Exam Questions:

1 -
2 C
3 E
4 C, C
5 C
6 C
7 D
8 B
9 -

03.

Additional Resources

# 03. Recommended Resources

The following resources were suggested by members of the 2018 Virtual GPC Study Group. The list of information is not endorsed by the Grant Professionals Certification Institute and does not represent an exhaustive list of resources that are available to grant professionals who are preparing for the GPC exam.

▷ Grant Professionals Certification Institute (GPCI)

   ▷▷ Articles & Other Public Documents
   Study and understand all aspects of the GPC credential and exam process. Use the GPCI Literature Review to identify materials to increase knowledge in areas where they have had less direct experience.

   ▷▷ GPC Exam Competencies and Skills
   The GPCI Board of Directors revised the GPC Exam Competencies and Skills in 2018.

   GPCI Social Media
   ▷▷ Twitter
   ▷▷ LinkedIn
   ▷▷ Facebook

▷ Florida Study Guide
   Resource created by a study group of GPA members that were preparing for the GPC exam in 2010.

▷ CFO Training Modules, Chief Financial Officer's Council Training Modules
   A free resource created by the U.S. Chief Financial Officers Council regarding federal grants management.

▷ Prepare for the GPC Exam: Earn Your Grant Professional Certified Credential
   A book by Pauline Annarino, GPC, Danny W. Blitch II, GPC, Kimberly Hays de Muga, GPC and Leslie Mitchell, GPC, (Charity Channel Press, 2016).

**Thank You**

**Study Group Facilitator:** Katherine F.H. Heart, GPC, M.Ed., President of Heart Resources, LLC, has provided comprehensive grant services for 18 years in Western Pennsylvania. Katherine is a GPA Approved Trainer who has conducted grant training and coaching services regionally and nationally for 12 years. Katherine is the author of *Grantepreneur: Getting Started in Grant Career and Business* (Red Engine Press, 2016). As the Founding President of the GPA-Western PA Chapter, Katherine conducted an in-person GPC Study Group for chapter members in 2016 using the scenarios and writing prompt that were disusssed during the 2018 Virtual GPC Study Group.

**Study Group Topic Facilitator:** Lauren H. Daniels, GPC Retired, based out of Chandler, Arizona, was a resource and co-facilitator for two live scenario sessions on competencies 3, 6 and 7. Study group participants appreciated having her highly experienced perspective especially for the discussion on ethics.

**Technology Coordinator:** JulieAnna Carsen, GPC, B.S., is a Grant Support Specialist, Senior with the Mary Lou Fulton Teachers College at Arizona State University and founder of JVG Synergy, LLC. Through JVG Synergy, JulieAnna has spearheaded public relations and fundraising campaigns, grant writing and business development strategies for not-for-profit organizations, municipalities and tribal programs since 2011. JulieAnna is a veteran of the U.S. Air Force and Army and earned the GPC credential after participating in the 2018 Virtual GPC Study Group.

**Study Group Participants:** This effort was organized by 20 members of the Grant Professionals Association who expressed interest in creating and participating in a virtual study group to prepare for the Grant Professionals Certification exam through a conversation thread in GrantZone. We wish to acknowledge and thank those study group members who volunteered as scribes, data collectors, interim technology facilitators and supported other group needs.

### Closing

The 10-week virtual study group was made possible through the collaborative effort of GPA members who were interested in sharing their professional experience to learn from one another in a group environment. Special thanks to Katherine Heart for sharing her expertise, learning materials, mentorship and time.