Virtual GPC Study Group Guide 2023

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The following facilitation methods and scenarios were originally drawn from a GPC Study Group that I facilitated in 2016 for the GPA-Western PA Chapter (now Grants Café at https://meetup.com/grants-professionals-of-western-pa).

The first national Virtual GPC Study Group in 2018 grew out of a GPA Forum request by several members for which I volunteered to facilitate group discussions and JulieAnna Carsen, GPC, JVG Synergy, LLC coordinated the virtual technology and group communications.

This 2023 Virtual GPC Study Group was a volunteer effort by co-facilitators of the Grants Café, including myself as the GPC Ambassador, Laurie Anderson, GPC, Caitlin Skaff, GPC, and Susan Jablow, GPC. Neither the Grants Café nor this Virtual GPC Study Group are affiliated with the Grant Professionals Certification Institute. This guide should not be the only source of study. I make no guarantees about exam performance or outcomes based on this guide. The scenarios are not derived from the GPC exam. Everyone who takes the GPC exam must agree not to share questions or content. 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.

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 me to 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.

In the specific areas where you have less experience, study and discuss it with others so you can recall that information for the exam. At the same time, group discussions should not be the only source of study – be sure to use the other recommended resources to prepare for the exam. Contact me at kheartwriter@gmail.com with questions.

THIS DOCUMENT IS NOT AFFILIATED WITH THE GRANT PROFESSIONALS CERTIFICATION INSTITUTE (GPCI) AND DOES NOT REPRESENT OR REPRODUCE ANY MATERIAL ON THE GPC EXAM.

Instructions and Timeline
Complete the recommended readings and participate in weekly virtual discussions to gain a deeper understanding of the types of questions in the GPC exam. Each meeting has an example scenario related to a 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, co-facilitators review one writing sample for each person in response to the final Writing Prompt which is the only assignment providing individual feedback. Discuss the writing exam and "reducing the stress of test preparation" at the last meeting. Following is a sample schedule of grant competency topics and dates for meetings.

Virtual GPC Study Group (2023) Schedule - All sessions were virtual, live, and not recorded on Fridays from 9:30 am to 10:30 am

Session #	Date	Topics
1	7/7	Q&A on what it's like to take the exam and get ready. Discuss Scenario #1 Funder Research
2	7/14	Discuss Scenario #2 Organizational Development
3	7/21	Discuss Scenario #3 Good Project Design
4	7/28	Discuss Scenario #4 Grant Proposal Development
5	8/4	Discuss Scenario #5 Post-Award Grant Management
6	8/11	Discuss Scenarios #6 Ethical Practices and #7 Professional Practices
7	8/18	Discuss Scenario #8 Funder Relations
8	8/25	Discuss and Share Scenario #9 Sample Writing Prompt - Facilitator reviews and private feedback of writing prompts will be available
9	9/1	Discuss Strategies for the Written Exam and Reducing Test Anxiety

Recommended Resources:
- Study and understand all aspects of the GPC credential and exam at https://grantcredential.org, confirm eligibility at https://www.surveymonkey.com/r/GPC_Eligibility_Quiz, start the process by preparing and submitting the Eligibility Packet which is required to sit for the exam. Use the GPCI Literature Review and other resources such as https://www.grantcredential.org/why-certify/top-10-mistakes-when-prepping-for-the-gpc/ to identify materials and increase knowledge in areas of less direct experience.
- Prepare for the GPC Exam: Earn Your Grant Professional Certified Credential by Pauline Annarino, GPC, Danny W. Blitch II, GPC, Kimberly Hays de Muga, GPC and Leslie Mitchell, GPC, Charity Channel Press, 2016. (HIGHLY RECOMMENDED)
- CFO Training Modules, Chief Financial Officer's Council Training Modules (Free) on Federal Grants Management: https://cfo.gov/grants/training
- GPCI has Twitter, LinkedIn and Facebooks group for people studying for the GPC https://twitter.com/gpcinstitute/status/961413126116773888

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.

Discussion: 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 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
Discussion: (a) how would you assess the organization's capacity to apply for this grant; (b) what organizational structures and processes affect grant seeking; (c) how does an organization become grant ready; and (d) what steps would you take to assist this organization?

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.

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

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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.

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

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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 organizations. 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

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GPC Virtual Study Group | Scenario #5: Post-Award Grant Management

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.

Choose:
   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

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GPC Virtual Study Group | Scenario #6: Ethical Practices

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.

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

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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

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

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GPC Virtual Study Group | Scenario #8: Funder Relations

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.

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

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Letters of Inquiry (LOI) are business letters. Consider how the question was framed to create an outline and format. 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.

GPC Virtual Study Group | Scenario #9: Writing Prompt

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., GPC 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 until Monday at 5:00 pm to undertake and submit the exercise.*
　　For the purpose of improving the ability to write a convincing case for funding competency and skills, you will receive individual feedback in the form of markups and scoring based upon the "Scoring Rubric for the Writing Sample" in the *Candidate Information Guide*. **I am not a GPCI test reviewer.** I have used scoring rubrics to perform federal grant reviews, in judging federal award programs, and for scholarship reviews. Comments will be provided back to individuals via return email before the last session. The feedback will be private, confidential, and specific to your writing sample. Your sample will not be shared in the group 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.
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

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NOTES:

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Answers to Sample Scenario Questions:
1 -
2 C
3 E
4 C, C
5 C
6 C
7 D
8 B
9 –