



Pro-Tips: Preparing Grant/Loan Applications Consultant Perspective

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Strategies for Success

- When to bring a Consultant/Engineer onboard to help
- Finding the right grant or loan program
- Unpack all the details and requirements
- Take credit for work you may have already completed
- Save time to prepare all the required information
- Other lessons learned

When to Bring a Consultant/Engineer Onboard to Help

1. Consider the available time and expertise of your District, Canal Company, or Department staff
 - A. Many of the applications are a significant commitment
 - B. Many require drawings and/or technical information
 - C. Timelines can be relatively short
2. Do you already work with a consultant or engineer?
 - A. Are they experienced preparing grant applications?
 - B. Are they deeply familiar with your facilities and the project you are looking to fund?
3. Plan ahead: developing a CIP (Capital Improvement Plan) or Master Plan for your facilities with a consultant's help, months or years in advance can set you up well for future funding programs
4. Consider pre-emptive full design for high-priority, high-cost projects to be “shovel ready”



Finding the Right Grant/Loan Program

1. Understand what any particular program is targeting
 - A. Water conservation/efficiency
 - B. Energy savings
 - C. Habitat enhancement (fish & wildlife)
 - D. Water quality enhancement
 - E. Flood hazard mitigation
 - F. Dam safety
 - G. Aging infrastructure / critical maintenance and repair
 - H. Other

Finding the Right Grant/Loan Program (continued)

2. Assess the needs and benefits of your specific project or projects:
 - A. A full understanding of the cash flow (how much money needed over what period of time, and at what intervals)
 - B. What results can the project(s) produce that align with prospective funding programs?
 - i. Can they meet multiple objectives?
 - ii. Can they align with objectives and projects of other stakeholders?
 - C. Consider small-scale annual programs more on a “pay as you go” basis
 - i. Do you have a multi-year, multi-facility project?
 - ii. Can programs align with an annual assessment set-aside normally called O&M?

Finding the Right Grant/Loan Program (continued)

3. Then - focus on the funding opportunities that will be "best", based on:
 - A. Program objectives
 - B. Amount of funding available
 - C. Timing of funding
 - D. Competitive environment
 - E. How well-prepared you are to complete application on time

Finding the Right Grant/Loan Program (continued)

4. Double check! - Make sure program timeline and requirements are achievable
 - A. Can you fulfill cost share requirements and reporting requirements?
 - B. Can you commit to the water savings (or similar) requirements?
 - C. If funding requires completion of construction by a certain date, can you get there?
 - D. If program requires environmental clearance to be in place, is it?

OK, So Now You Have Picked a Program to Pursue...

Unpack all the Details and Requirements

1. Develop a “Compliance Matrix”

A. A table of what the application requires to be submitted, such as:

- Written responses to questions
- Tables detailing costs and cost share
- Figures or sketches describing project
- Letters of support from project proponents
- Letters of commitment from District manager

B. A list of how points will be awarded

- Water or energy savings, alignment with program objectives, connectivity to other basin programs, etc.

2. Use the matrix to systematically prepare the application

A. Often the application will use an online tool, so preparing response material in a Word doc to copy/paste from is helpful

B. Mission is to comply with all requirements and maximize points



Take Credit for Work You May Have Already Completed

1. Completed work can:

- A. Count toward cost share
- B. Show a progression toward the ultimate implementation of a project
- C. Show alignment with other projects or priorities within the basin



being part of a continuous, broader strategy is a good thing!

2. These could include:

- A. Monitoring and data collection
- B. Surveying
- C. Feasibility studies
- D. Permitting/NEPA and environmental clearance
- E. Designs

Save Time to Complete All the Required Information

1. Many of the applications are tedious, with lots of detail required
 - A. Detailed accounting of water or energy savings
 - B. Detailed breakdowns of cost
 - C. Breakdowns of District staff rates and overheads, Consulting costs, etc.
 - D. Resolution from Board of Directors meeting authorizing the application
2. Letters of support (if required) usually take weeks or months to get

Other Lessons Learned

1. Probably need to be bold and creative - usually stiff competition for funding
2. Ask questions of the funding agency if information being requested is unclear
3. Beware of last-minute changes to things like estimated water savings – tend to trickle through entire application
4. Finish a day or two before application is due – we have seen online systems get glitchy and jeopardize submission

Questions?