## **Grant Writing Guide**

A Process to Request Recovery Assistance

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#### **Developing a Grant Proposal**

A successful grant proposal is one that is well-prepared, thoughtfully planned, and concisely packaged.

<u>Step One:</u> In establishing a funding and resource development initiative, an applicant's priorities should already have been determined. Ideally, these are set through meetings with board members to establish a solid consensus before programs are ever proposed or developed. Not all organization priorities can translate into good proposals, however. After establishing a plan of action, the applicant organization should have a clear intent for how revenue is to be used before seeking a sponsor.

Prior to developing a funding proposal, an applicant should assess his/her own organization's skills, abilities, and prior history of performing services or offering programs. Eligibility often requires an organization to be exempt from taxation under Section 501(c)(3) of the Internal Revenue Code. Other funding programs require a cash match from a nonfederal source or match in the form of in-kind services/donations. These requirements, and others, are typically outlined in funding opportunity announcements and/or program guidelines of potential sponsors. An applicant should become familiar with all of the criteria related to the assistance being sought. <sup>1</sup>

Legislators, area government agencies, and related public and private organizations should be contacted to determine if they also have grant awards or contracts to do similar work. The applicant should determine if a similar program already exists and reconsider submitting a proposal if a duplication of effort might be perceived. If significant differences or improvements are anticipated and the proposed project's goals can be clearly established, it may be worthwhile to pursue federal and/or state assistance.<sup>1</sup>

The applicant should obtain community support for most proposals. Once a plan has been developed, contact should be made with individuals or groups representing academic,

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<sup>1.</sup> All footnotes referenced on page 17.

political, professional, and lay organizations that may be willing to support the proposal. The funding agency may request Letters of Support to provide essential endorsements or commitments.<sup>1</sup>

<u>Step Two:</u> Select the proposal writer and develop the proposal. After the first or second draft is completed, the applicant should have it reviewed for continuity, clarity, and reasoning – helping to ensure the best possible proposal is submitted to the granting agency.<sup>1,2</sup>

<u>Step Three:</u> Packaging the proposal. Be certain your proposal contains all the required documents, forms, budgets, resumes, financial statements, and other documents that the funding opportunity announcement and/or guidelines specify. Most proposals require an authorized signature of the applicant organization's chief official, as well. Check early to verify which authority should sign and whether his/her availability meets the proposal deadline.

#### **Finding Funding**

As cut-backs in government programs and foundation funding have occurred in recent years, many new nonprofits have sprung into existence to address unmet needs and the corresponding demand for community services. Competition for every dollar of grant funding is tight. It is more important than ever, therefore, to match the mission of the granting organization to that of the applicant seeking funds. Without exception, granting agencies specify the types of projects that they will fund. If the applicant is in doubt as to whether its project falls within the defined funding priorities, a call to the program manager should be made prior to developing a proposal. Some agencies require a pre-proposal or a Letter of Inquiry describing the project to determine if a proposed program meets its funding criteria. In these situations, full proposals are typically accepted by invitation only. Although more restrictive than guidelines of other organizations which accept unsolicited proposals, such requirements benefit the applicant by providing assurance that a proposal will (in fact) be given serious consideration.

<sup>1,2</sup> All footnotes referenced on page 17.

Obtaining grant funding is an investment in the future. Your aim should be to build a network of foundations, corporate funders, and federal/state agencies with which to develop long-term working relationships. There are many sources available for identifying potential funding programs. Please reference page 16 of this document for a brief list of funding directories and electronic search engines.

Using search engines is an efficient and effective way to identify potential sources of funding for your organization. Various options enable you to search by project type, geographic location, agency name, or any number of other criteria. While a subscription fee is required to use some specialized search engines, others are available at no charge. Free searches can be made by going directly to the websites of federal/state agencies or foundations, or to public sources such as <a href="www.grants.gov">www.grants.gov</a>. If utilizing the agencies' websites, the applicant should be knowledgeable of the agencies and the types of projects they are seeking to fund.

#### **Proposal Format**

This section describes the "nuts and bolts" of the proposal document. The proposal should contain the objectives, methods, staffing and administration, and methods of evaluation for your project. The required format of the proposal will be outlined by the guidelines and restrictions of the funding agency. Some grantmaking organizations may only require a cover letter to outline specific information – i.e. list of Board Members, copy of IRS letter, budget, etc. Other sponsors have more extensive requirements. Federal applications typically include standard documents such as the Standard Form 424 (SF-424). Likewise, foundations and/or corporate giving programs often require similar forms to be completed. Typically, the proposal will contain most, if not all, of the following:

- Cover letter (on organization's letterhead);
- Cover page;
- Introduction or Executive Summary;
- Qualifications of the organization;

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<sup>&</sup>lt;sup>8</sup> All footnotes referenced on page 17.

- Need for project/program;
- Goals and objectives;
- Methodology/program details;
- Timeline or milestones:
- Program evaluation plan (method of measuring accomplishments or success);
- Plans for obtaining long term funding;
- Budget and/or budget narrative;
- Financial statement (usually required by foundations); and
- Appendices (other required documents).

The agency guidelines should specify the acceptable margins, fonts, and line spacing. Typically, proposals are double-spaced and printed on plain bond paper with 1" margins. Times New Roman or Arial – no smaller than 11 point – are the most commonly used fonts. A Table of Contents should be included with long proposals. Graphs or charts should be readable in black and white copy.

## **Preparing the Executive Summary**

For a foundation grant application, the Executive Summary focuses on the problem, the solution, and how it can be applied to benefit the community. Also, the Executive Summary should include a call for action. The Executive Summary should answer the following questions and include a request for the grant.<sup>3</sup>

#### What's the problem?

State problems, issues, and facts supported by recognized research.

#### What's the solution?

Prove that the problem merits working toward a solution. You should provide references to recognized research that support such efforts, as well as specify research plans, expected outcomes, and value to the community.

How can results be applied and change the world?

<sup>&</sup>lt;sup>3</sup> All footnotes referenced on page 17.

Demonstrate the benefits for your project and how it may be duplicated to contribute to solving similar problems faced by other communities, increase knowledge, benefit the grantor, and (most importantly) serve the community.

#### Ask for the grant award.

Be explicit when applying for a grant. Provide a breakdown of funds needed. Finally, involve the grantor in expected outcomes and future recognition.<sup>3</sup>

#### **Executive Summary Tips: Do(s) and Don't(s)**

Here are some tips on how to write your Executive Summary – and what to avoid when writing it.<sup>3</sup>

- Be persuasive (state, prove, and apply).
- Write your Executive Summary with active-voice sentences.
- Use strong, enthusiastic, and proactive language.
- Convert passive-voice sentences to active voice as often as possible.
- Write simple, short sentences.
- Keep your Executive Summary short (one page for every 20 to 50 pages of total document length).
- Avoid unnecessary technical details.
- Avoid excessive jargon, and write the definition first.
- Verify that mathematical figures/sums match throughout the proposal.
- Correct spelling, punctuation, style, and grammar errors.<sup>3</sup>

#### **Preparing the Introduction**

Proposals should include a description of the applicant's organization, outlining its past and present operations. Some features to include are:

- A brief biography of Board Members and key staff members.
- The organization's goals, philosophy, track record with other grantors, and any success stories.

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<sup>&</sup>lt;sup>3</sup> All footnotes referenced on page 17.

• The data should relate to the goals of the grantor agency and should establish the applicant's credibility.

#### **Writing the Statement of Need**

Every proposal should include a Statement of Need. The same holds true for Letters of Inquiry, solicitation, or any kind of fundraising communication. Defining "the need" describes the problem or the reason for the community's fundraising request. It is not the applicant's need. A good Statement of Need describes the population or constituency you serve. It provides the proposal's key element by making a clear, concise, and well-supported statement of the problem to be addressed. This key element describes and details the geographic area you cover; conveys the extent of the problem; persuades the reader that the need is real; cites data about your issue or clients; and supports your case with quotes from others in the form of research studies, government reports, or your own organization's experience.<sup>4</sup>

The Needs Statement should illustrate urgency and demonstrate the enormity of the need in your community. This is particularly important because you may compete with others in your geographical area. There should be a balance between presenting statistics and pulling the heart strings, while being mindful not to be too depressing. The Needs Statement should connect with current events, tell a story that conveys your knowledge and insight, and demonstrate that your organization understands the issue well enough to address the problem. The statement should focus on what the agency needs, not on what your particular organization lacks. An ideal funding agency will reference goals and objectives similar to the applicant's.<sup>4</sup>

If the proposal is to make your organization stronger (via "capacity building" or "technical assistance") and not to run a program, the Needs Statement should address both the world

<sup>&</sup>lt;sup>4</sup> All footnotes referenced on page 17.

<sup>&</sup>lt;sup>4</sup> All footnotes referenced on page 17.

need and how your organization can fill the gap with the resources the funding organization provides – those which strengthen your organization enough to meet the need.<sup>4</sup>

Overall, those reading the Needs Statement should be able to tell what kind of program you wish to fund, the urgency of the need, how it relates to the funding mission, and your organization's ability to address the need. The information provided should be both factual and directly related to the problem addressed by the proposal. Areas to document include:

- The purpose for developing the proposal.
- The beneficiaries who are they and how will they benefit?
- The social and economic costs to be affected.
- The nature of the problem (provide as much hard evidence as possible).
- How the applicant organization came to realize the problem exists and actions being taken currently to fix the problem; identify factors that had any positive impacts (especially if they correlate to your plan), and factors that have made the problem worse.
- When funding has been exhausted, list what alternatives remain. Explain what will happen to the project and the impending implications if no action is taken.
- Most importantly, specify the methods that lead to a solution of the problem. Review the resources needed, how they will be used, and the expected results.<sup>4</sup>

#### **Developing Measurable Goals and Objectives**

A goal is the guiding principle for decision-making. Objectives are specific, measurable steps that can be taken to meet a goal and are essential for evaluating progress. A common way to describe goals and objectives is to say:<sup>5</sup>

Goals are broad.

Goals are general intentions.

Goals are intangible.

Goals are abstract.

Objectives are narrow.

Objectives are precise.

Objectives are tangible.

<sup>&</sup>lt;sup>5</sup> All footnotes referenced on page 17.

Goals are generally difficult to measure. Objectives are measurable.

#### Measurable objectives should include:

- Who is involved? Describe the intended beneficiaries; people whose behaviors,
   knowledge, and skills should change as positive influences replace deficiencies.
- What are the desired outcomes? Explain the end result; what behavior, knowledge, and skill changes appear after the program or activities finish.
- *How is progress measured?* What measurement tools or devices will be used to quantify the expected changes? Specify surveys, tests, and data from schools, police, the health department, program records, or other sources.
- *How is the proficiency level identified?* Identify the criteria for success.
- When will the outcome occur? Identify the time frame for success.

#### **Example: Community and Rural Development Goals and Objectives**

XYZ County is an "entitlement recipient" of Community Development Block Grant (CDBG) funds operated through the state after receiving allocations from the United States Department of Housing and Urban Development (HUD).

The goals of the program are:

- To develop viable communities by providing decent housing and a suitable living environment;
- To expand economic opportunities for low- and moderate-income individuals and families; and,
- To strengthen the partnerships between all levels of government and the private sector (including for-profit and not-for-profit organizations) to facilitate production of affordable housing, sufficient to meet the needs of the community.

The following long-range objectives will benefit the citizens of XYZ County and are intended to meet the goals of providing decent housing, improving the living environment, and offering economic opportunities for low- and moderate-income individuals and families:

 To rehabilitate, construct, or expand public facilities and infrastructures, including the renovation of existing public facilities; street improvements, including improved lighting, landscaping, sidewalks, streets, drainage, or connections to sewer systems.

- To upgrade the existing housing stock and provide loans and/or grants to incomeeligible home owners for home repairs and replacement of substandard or leaking roofs.
- To expand affordable rental housing and home ownership opportunities for XYZ County residents.
- To increase or enhance park and recreation opportunities, and expand programs that serve at-risk youth, such as the renovation of existing parks (improved lighting, landscaping, or equipment). This may include the construction of new park and recreation facilities, the provision of additional services, or acquisition of new facilities.
- To expand affordable child daycare and after-school opportunities.
- To promote economic development initiatives and stimulate the local economy through neighborhood revitalization, commercial revitalization, or facade renovation programs.
- To minimize the displacement of XYZ County residents and mitigate adverse effects caused by natural disasters, and to provide fair and adequate relocation benefits when needed.

The outputs will be measured by increases in the number of housing units, public services, and revitalization projects.

	FY 2003-04 Actual	FY 2004-05 Estimated	FY 2005-06 Planned	
Improvements to Public Facilities	20	23	20	
<b>Rural Development Grants</b>	N/A N/A		8	
CDBG Public Service Grants	7	19 10	20 40	
Youth Program Grants	8			
<b>Human Service Grants</b>	9	12	41	
General Public Service Grants	N/A	N/A	9	
Neighborhood Revitalization Projects	8	30	30	
Housing Rehabilitation	224	230	235	

Table 1: Community and Rural Development Program Measures for XYZ County

#### **Program Narrative**

The Program Narrative discusses how the project is expected to work and solve the stated problem. The objectives have explained what will be achieved by the project, and the narrative should explain the methods or means used to perform the objectives. The Program Narrative should address the following:

- The activities to occur, along with the related resources and staff needed to operate the project (inputs).
- A flow chart of the organization features of the project. Describe how the parts interrelate, where personnel will be needed, and what they are expected to do. Identify the kinds of facilities, transportation, and required support services (throughputs).
- Explain what will be achieved through the previous two bullets (outputs); for example, plan for measurable results. Project staff may be required to produce evidence of program performance through an examination of stated objectives during either a site visit by the grantor agency or peer-review evaluation committees.
- Wherever possible, use the narrative to justify the course of action taken. The most economical method should be used that does not compromise or sacrifice project quality. The financial expenses associated with the grant request will later become points of negotiation with the program staff. If everything is not carefully justified and written into the proposal (after negotiation with the grantor agencies), the budget for the approved project might not sufficiently cover the original concept. Carefully consider the time and money needed to acquire goods and services for each part of the plan.

- Highlight the innovative features of the proposal which could be considered distinct from other proposals under consideration.
- When the agency allows, use appendices to provide details, supplementary data, references, and information requiring in-depth analysis. These types of data, although supportive of the proposal, could detract from the readability if included in the body of the proposal. Appendices provide the proposal reader with immediate access to details, if and when clarification of an idea, sequence, or conclusion is required. Time tables, work plans, schedules, activities, methodologies, legal papers, personal vitae, Letters of Support, and endorsements are examples of appendices.

#### **Program Evaluation**

Most agencies now require some form of evaluation. The program evaluation should relate to measuring the outcome of the goals and objectives included in the program narrative. Evaluations may be conducted by an internal staff member, an evaluation firm, or both. The applicant should provide a timetable, method, and design for evaluations – whether they start at the beginning, middle, or end of a project. The applicant should specify a start-up time. It is practical to submit an evaluation design at the start of a project for two reasons:

- The evaluations require the collection of appropriate data (before and during program operations); and
- If the evaluation design cannot be prepared at the outset, then a critical review of the program design might be necessary.<sup>1</sup>

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<sup>&</sup>lt;sup>1</sup> All footnotes referenced on page 17.

The evaluation component serves both product and process evaluation purposes. Product evaluation addresses the results that can be attributed to the project, as well as the extent to which the project has satisfied its desired objectives. Process evaluation addresses how the project was conducted, in terms of consistency with the stated plan of action and the effectiveness of the various activities within the plan.

#### **Future Funding: Long-Term Project Planning**

Address maintenance and future program funding if the program is designed to be sustained.

A plan for continuing the program beyond the grant period and the availability of other resources necessary to implement the grant should be included. Do not anticipate that the income from the grant will be the sole support for the project. The need for continued support should be considered when preparing the overall budget requirements. The applicant should give particular attention to long-term plans for the program.<sup>1</sup>

#### **Budget and Budget Narrative or Justification**

The Project Narrative provides a picture of the proposal in words. The budget further refines that picture, but with numbers. A well-structured budget adds greatly to the organization's understanding of your project.<sup>2</sup> Base the budget upon the activities to be performed. Besides the fixed or ongoing costs associated with the project, include project-specific expenses in your budget. Most organizations use a pre-determined formula to calculate the agencies' overhead or indirect costs to be charged to the grant. It is important to understand any budget restrictions imposed by the funding agency. Some expense categories are not allowed to be

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<sup>&</sup>lt;sup>2</sup> All footnotes referenced on page 17.

paid with federal funds, and some funding agencies will disallow ineligible costs such as overhead, indirect costs, or foreign travel. Budget line items that are subject to inflation or cost-of-living increases should be adjusted accordingly for subsequent years. Budget adjustments after the grant award are sometimes not possible. Some vulnerable budget areas are: costs of leases, salary increase, insurance, and transportation. When preparing a proposal for a federal funding program, be sure to verify that the budget matches sums referenced on the SF-424 (Application for Federal Assistance).

Some budget line items are straightforward and the numbers tell the story clearly. A well-prepared budget justifies expenses and is consistent with the proposal narrative. Use a budget narrative to explain any unusual line items in the budget. Some areas requiring a detailed written narrative or justification are:

- Salaries and fringe benefits in the proposal that reflect local averages. Credit the resource used to identify the figures.
- Equipment purchases should be described for function and cost. List any equipment
  costing \$5,000 or more per item. Take note that federal acquisition rules require
  purchased equipment to be returned to the government following the end of the grant
  period.
- Travel should include an explanation of the purpose, expected results, and costs for anticipated trips.
- Describe materials and supplies; include how they are used to support the program.

 Indirect cost rates applied to the proposal should maintain the division between direct and indirect cost (usually not to exceed an established percentage of the total award).

#### **Use of Technology**

Computerization is becoming more commonplace in the federal and foundation grant submissions process. The Internet – the World Wide Web – and eMail are often expected in this world of new technology. Lack of computers or capabilities can put some organizations at a disadvantage. Most federal agencies require the use of <a href="www.grants.gov">www.grants.gov</a> as the single point for proposal submissions. Also, many funding agencies use specialized Internet-based grant submission systems – such as Altum's Proposal CENTRAL, an e-grant making website shared by many government, nonprofit, and private grant-making organizations. Altum's website is <a href="https://proposalcentral.altum.com">https://proposalcentral.altum.com</a>.

<sup>&</sup>lt;sup>8</sup> All footnotes referenced on page 17.

#### Online Resources for Funding and Resource Development

### **Grant Writing Training:**

Proposal Writing Basics: <a href="http://foundationcenter.org/getstarted/training/free/pwb.html">http://foundationcenter.org/getstarted/training/free/pwb.html</a>

#### **Electronic Funding Resources:**

Stimulus Funding: <a href="http://www.recovery.gov/">http://www.recovery.gov/</a>

Federal Grants: <a href="http://www.grants.gov/">http://www.grants.gov/</a>

http://www.cfda.gov/

http://www.federalgrantswire.com/

http://ric.nal.usda.gov/nal\_web/ric/ffd.php

Foundation Center On-Line Director: <a href="http://foundationcenter.org/">http://foundationcenter.org/</a>

The Grantsmanship Center: <a href="http://tgci.com/">http://tgci.com/</a>

The Chronicle of Philanthropy: http://philanthropy.com/grants/

GrantsAlert.com: http://www.grantsalert.com/

GrantStation: http://www.grantstation.com/

GuideStar: http://www.guidestar.org/

Top Foundation Grants: http://www.topfoundationgrants.com/

SchoolGrants: http://www.schoolgrants.org/

#### **Federal Funding Regulations:**

OMB Circulars Nos. A-87, A-102, A-110, and A-133; and Executive Order 12372.

Publications Office
Office of Administration, Room 2200
725 Seventeenth Street NW
Washington, DC 20503
http://www.whitehouse.gov/omb/circulars/

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#### **Appendices**

#### SAMPLE COVER LETTER FOR GRANT PROPOSAL

The cover letter should contain a summary of your proposal, introduce your organization and summarize any recent communications you've had with the funding organization. Include the amount of funding that you are requesting, the population it will serve, and the need it will help solve. Try to bring your project to life in the cover letter and actively engage your reader.

01/01/10

Ms. Mildred Spiers Program Officer Corporate Giving Program Major Manufacturing Corporation 1234 Audubon Parkway, Suite 567 City, State 89012-3456

Re: Senior Fitness Program for XYZ County

Dear Ms. Spiers:

XYZ County Parks and Recreation Service respectfully submits its proposal to the Corporate Giving Program for \$25,000 to support Senior Fitness, our physical fitness program for retirees.

Senior Fitness is an innovative program that prompts retirees to get up out of their chairs and move their bodies, as they bridge the cultural gap between Lawrence Welk and hiphop. While we offer a variety of programs that serve community members of every age and background, this particular proposal seeks funding for one of our most innovative programs: our fitness program for retirees. Research shows that 80% of seniors who exercise live longer, have fewer health problems, are more mentally alert, and less likely to experience depression. This program is to be the cornerstone of our organization and highlights our strategy to bring music and therapeutic exercise to low-income senior citizens.

To reach our mission, XYZ County seeks to launch an innovative partnership with Major Manufacturing Corporation consisting of funding and volunteer efforts. We look forward to exploring the possibilities with you. Thank you for considering our request. Please call John Brown, our Development Director, at 555-555-5555 if you need additional information.

Sincerely,

Colonel Jack Snow, Executive Director XYZ County Parks and Recreation Service 987 Sunnyside Parkway, Suite A City, State 12345-6789

#### **Appendices**

#### SAMPLE GRANT PROPOSAL COVER PAGE

# Senior Fitness: Physical Therapy While Grooving to the Oldies

Submitted to: Major Manufacturing Corporation

Date: January 1, 2010

Colonel Jack Snow, Executive Director XYZ County Parks and Recreation Service 987 Sunnyside Parkway, Suite A City, State 12345-6789 555-555-5555

## **Appendices**

#### SAMPLE BUDGET/NARRATIVE

Item	Quantity	Cost	Subtotal	Total
Personnel (Salaries & Wages)				\$19,298
Project Director: \$38,290 x 20% x 2 years			\$15,316	
Fringe Benefits: \$15,316 x 26%			\$3,982	
Consultants				\$4,100
Consulting Physiologist: Dr. Smith	20 hours	\$30/hour	\$600	
Evaluation Consultant: Dr. Jones	14 days	\$250/day	\$3,500	
Equipment				\$8,053
Universal Weight Center	1	\$1,800	\$1,800	
Atlas Stationary Bike	2	\$895	\$1,790	
Speedster Treadmill	1	\$1,195	\$1,195	
Laptop Computer	1	\$2,895	\$2,895	
Computer software	1	\$373	\$373	
Supplies				\$858
Towels, bath soap, and disinfectant	package	\$358	\$358	
Photographic and slide film	20	\$5	\$100	
Audio cassette tapes	200	\$2	\$400	
Subtotal				\$32,309
Contingency (10%)				\$3,231
Administrative Overhead (3.5%)				\$1,131
Total				\$36,671
Sought from other sources				\$11,671
<b>Total Grant Request</b>				\$25,000

## Personnel:

Project Director will devote 20% of his total time at work to administer the Senior Fitness program for the two year duration of the project. The standard rate for employee benefits in XYZ County is 26%.

#### **Consultants:**

The hourly and daily rates requested by Dr. Smith and Dr. Jones are their usual and customary rates, and are supported by their education and experience.

#### Equipment:

The listed cost of the fitness equipment was determined through a competitive bidding process. Of the four vendors that responded to the bid, Fantastic Athletic Gear submitted the lowest bid. A laptop computer will be necessary for recording observations, thoughts, and analysis throughout the course of the two-year program. The price was the result of a competitive bidding process. Computer software is necessary for cataloging, indexing, and managing fitness sessions. The program will assist in cataloging themes that emerge during the medical history interviews.

#### Supplies:

The cost of the supplies was based on 40 towels at \$6.00 per towel, 120 bars of soap at \$0.40 per bar, and four 2-gallon bottles of disinfectant at \$17.50 per bottle. Audiocassette tapes will be necessary for recording life history data, audio progress reports, and to provide background music during the fitness sessions. Photographic and slide film will be necessary to document visual data and fitness training sessions.

<u>Administrative Overhead:</u> 3.5% is the standard county rate charged to funding programs and covers a percentage of the building lease, a percentage of utilities, and a percentage of salaries paid to the XYZ County Parks and Recreation Service accountant and receptionist, respectively.