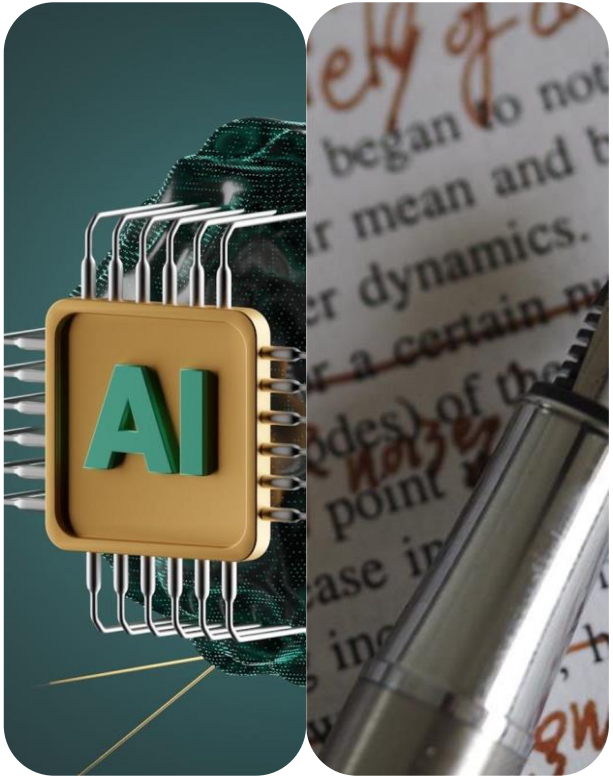
Using AI as a Personalized Grant Reviewer



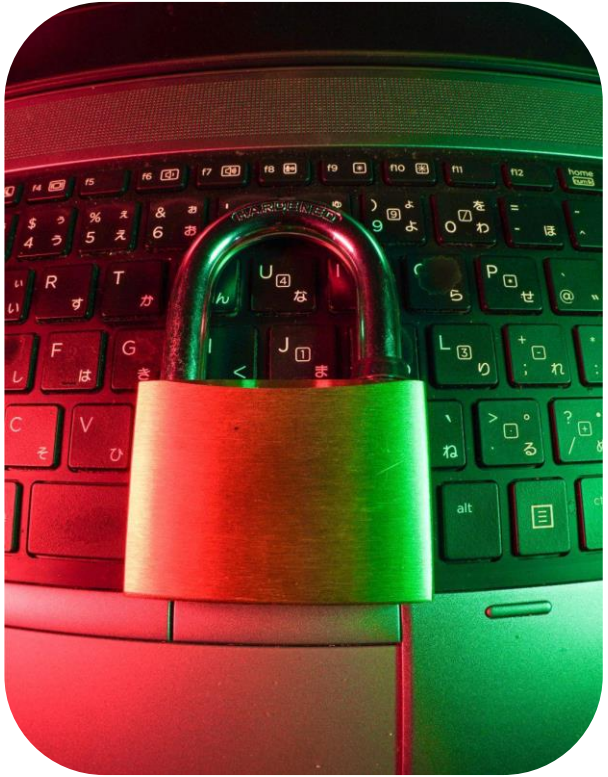
GrantStation
Your Fast Track To Funding

Agenda

- Review Privacy
- Feedback Tips
- GrantStation’s Scoring Rubric
- Using “act as” prompts
- Prompts for:
    - Using ChatGPT as a personalized grant reviewer;
        - Identifying strengths and eliminate weaknesses; and,
        - Identifying actionable ways to improve your proposals.
    - Ensuring compliance with funders

Privacy Options

- Opt-out of chat history & training
  - (Settings–Data Controls)
- Make a privacy request
- Use a Business Account (New Option)
  - Default setting does not train off of your data
- Use a service that use ChatGPT's API (i.e Grantable)
  - *OpenAI will not use data submitted by customers via our API to train or improve our models, unless you explicitly decide to share your data with us for this purpose. You can opt-in to share data.*



Demo

Feedback Tips

- Feedback from funders: Government vs. Foundations
- Use AI tools as a complement to human reviewers
- You can use the tool to pull out strengths and weaknesses
- Request targeted advice as to how to improve areas of weaknesses
- Not all advice means you have to make changes
- Use the funder guidelines when appropriate

GrantStation's Scoring Rubric

	Exemplary (6-7)	Adequate (4-5)	Needs Improvement (2-3)	Poor (0-1)
Organizational Description	The organization has a history of success in operating similar programs; The organization is strong and viable.	The organization has operated similar programs with some success; The organization has adequate structure.	The organization has operated similar programs with no evidence of success; The organization has weaknesses.	The organization does not have a track record of operating similar programs; The organization has significant weaknesses.
Need/Problem Statement	The problem/need is clearly articulated with data that is local, relevant, and up-to-date; All sources of data are cited; The need is presented in a compelling manner.	The problem/need is outlined with data that sufficiently identifies the problem; All sources of data are provided, but could be more up-to-date or better connected to the problem being addressed in the project.	The problem/need is described with data, but not at a local level; Data sources are out-of-date or not relevant to the project; Not all sources are cited.	The problem/need is not clearly articulated; Data sources are out-of-date and not relevant to the project; Sources are not cited.
Project Design/Approach	The plan is logical and will likely have a significant impact on the community/target population; The plan appears reasonable, scalable, and builds on other relevant work.	The plan is likely to have an impact on the community/target population; The plan appears reasonable and scalable but does not build on other relevant work.	The plan is likely to have a limited impact on the community/target population; The plan is not scalable nor does it build on other work.	The plan is unlikely to have an impact on the community/target population; The plan does not have a logical approach or build on relevant work in the community.
Work Plan/Timeline	The project can be completed within the proposed timeline; The work plan is well detailed and developed.	The project can likely be completed within the proposed timeline; The work plan has sufficient information and details.	It will be challenging to complete the project within the timeline; The work plan has gaps.	It is unlikely that the project can be completed within the timeline; The work plan is nonexistent or not sufficiently detailed.
Partnerships	The partnerships create a unified vision; Collaboration, information, and resource sharing are maximized.	The partnerships create a shared vision; Resources are shared.	The partnerships create a limited shared vision or sharing of resources.	The partnerships are not identified nor sufficient.
Project Goals and Objectives (AKA: Project Outcomes and Indicators)	The goals of the project are clearly described and visionary; The objectives are concrete and measurable; The goals and objectives will have a significant impact on the need/problem statement.	The goals of the project are visionary; The objectives are concrete and measurable; The goals and objectives will have an impact on the need/problem statement.	The goals are not visionary; The objectives are not concrete or measurable; The goals and objectives will have a limited impact on the need/problem statement.	The goals and objectives are nonexistent or unclear.

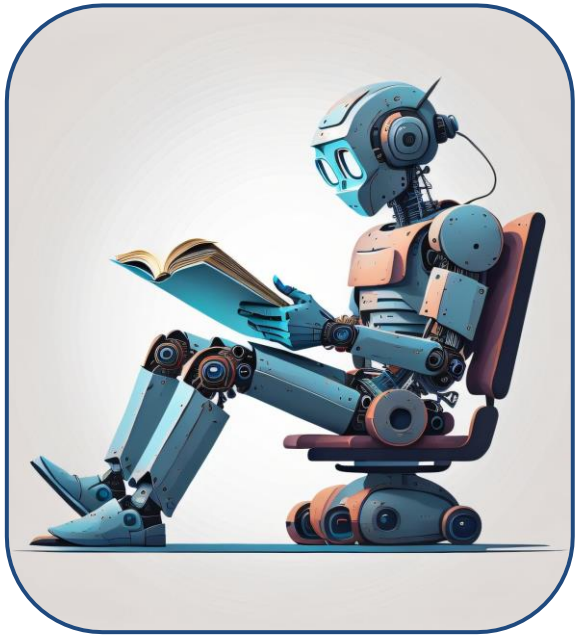
STEP 3

GrantStation's Scoring Rubric

	Exemplary (6-7)	Adequate (4-5)	Needs Improvement (2-3)	Poor (0-1)
Evaluation/Assessment Plan	A practical, useful evaluation/assessment plan addressing the project's impact is described; Participant outcomes and planned activities will both be measured.	An evaluation/assessment plan is provided but some components are unclear; Participant outcomes and planned activities will both be measured.	An evaluation/assessment plan is only partially provided; Participant outcomes are not measured.	The evaluation/assessment plan is insufficient and unlikely to provide useful information on participant outcomes or planned activities.
Budget/Budget Narrative	The planned expenditures are clearly described in the plan; All costs are reasonable, covered, and justified; Excellent use of resources.	The planned expenditures logically support and are necessary for the planned actions.	The planned expenditures might support the planned actions, but require more detail or justification.	The planned expenditures do not logically support the planned actions; Some costs are unnecessary.
Sustainability	The proposal describes significant long-term impact beyond initial funding; There is a high likelihood of future implementation or impacts of the program.	The proposal does describe sustainability of parts of the program.	The proposal provides a limited or unclear sustainability plan.	The proposal does not discuss sustainability of the project.
Formatting and Writing Style	The writing is free of grammatical, spelling, or punctuation errors; The style of writing facilitates understanding of the project; The narrative is compelling and engaging.	The writing is largely free of grammatical, spelling, or punctuation errors; The style of writing generally facilitates understanding of the project; The narrative is clear.	The writing includes some grammatical, spelling, or punctuation errors that distract the reader; The style of writing is unclear; The narrative is confusing to follow.	The writing contains numerous grammatical, spelling, or punctuation errors; The style of writing does not facilitate understanding; The narrative is incoherent.

“Act As” Prompts

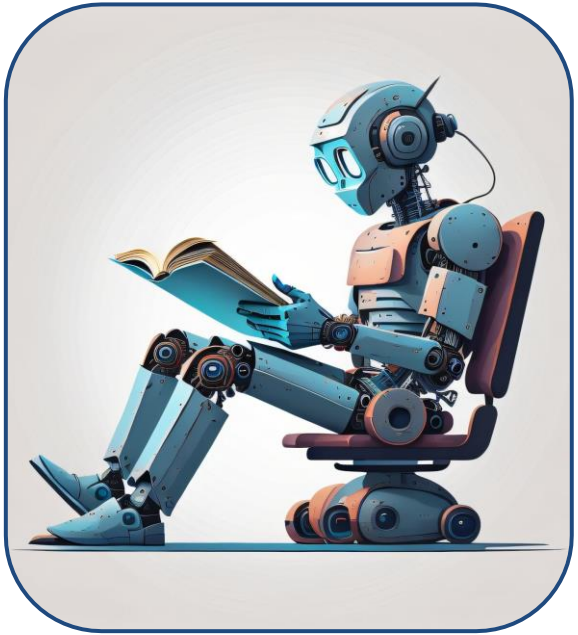
- “Act As” prompts are a powerful way to us AI
  - Provides “role-based” responses and clarity around how the AI should respond
  - Emulates the expertise of the assigned role
- Can take many roles
  - Grant reviewer
  - Grant writer
  - Potential funder
  - Potential donor



Tips

- **Be Specific and define clear roles and goals**
- **Start prompts with “Act as” or “Assume the role of”**
- **Examples:**
    - Act as the Executive Director of a nonprofit dedicated to ending the homeless crisis in Seattle. Your organization just received a large unrestricted grant. You're considering various options such as expanding programs, building capacity, and increasing employee compensation. Please compare the pros and cons of various options. Provide a tailored recommendation.

    - Assume the role of a grant reviewer looking for clear and measurable outcomes: Which of our proposed outcomes listed below do you find most measurable and achievable, and how could we enhance our evaluation plan to better measure these outcomes?

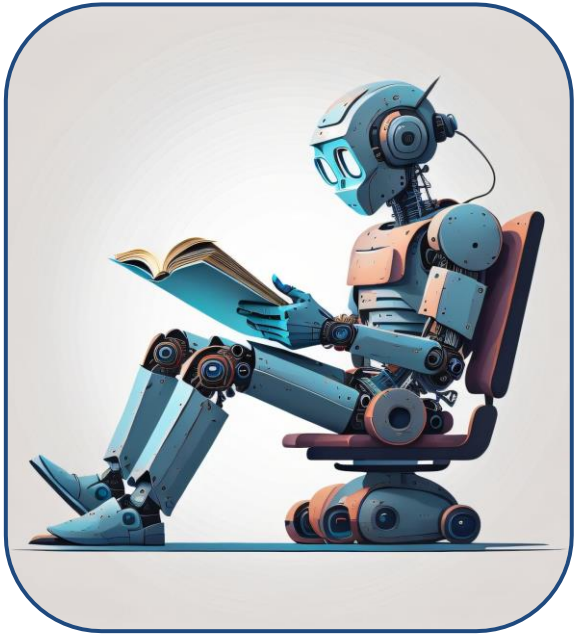


Demo

Simple “Act As” Prompt

- For those new to ChatGPT you can get familiar using the system with the following prompt:
  - Act as a grant reviewer. I need assistance improving my grant proposal. Analyze the (needs section) of my proposal below. Please provide targeted and constructive feedback to help refine and strengthen this section.

    (Copy & Paste a Specific Section)



Personalized Grant Reviewer

- **Prompts**
  - Act as a grant reviewer working for a funder focused on helping (increase access to arts and culture in the Twin Cities). Review the following needs section of my grant proposal. Provide actionable ways it could be improved to (highlight the need for increased arts access to youth in the Twin Cities.)
    - https://chat.openai.com/share/317cd35e-4d24-4483-b7ab-90c8938cced3

Demo

Personalized Grant Reviewer

- **Prompts**
  - Act as a grant reviewer for (The Farrell Family Foundation.) The Foundation's primary focus areas include (the Arts where support is provided to organizations that provide quality in their productions and exhibitions, access to the entire community, and strong outreach and educational programs.) Review the following needs section of my grant proposal. Highlight specific ways it could be improved to align with (The Farrell Family Foundation’s priorities.)
    - https://chat.openai.com/share/9f3a04ac-738c-41f2-8431-f46095b931f0

Demo

Identifying Strengths & Weaknesses

- **Prompts**
  - I’m a grant writer for (The Children’s Club). I need help improving my (executive summary) for use in grants and letters of inquiry. Please review the (executive summary) below. Highlight the strengths and weaknesses of the executive summary. Provide actionable ways it could be improved.
    - https://chat.openai.com/share/f140775b-35cd-4115-be87-e6ae9dfc0980

Demo

Identifying Strengths & Weaknesses

- **Prompts:**
  - Act as a potential donor for my (educational program). Review the (executive summary) below. What would inspire you to donate? What are some reasons you may be skeptical of donating to (The Children's' Club). Provide actionable ways to improve the executive summary.
    - https://chat.openai.com/share/6c2ec66a-e9d3-4cc8-9c79-b9ed1ae81713

Demo

Adhering to Funder's Guidelines

- **Process**
  - Step 1: Input funder's instructions/questions
    - Start with one question in an RFP
    - As you get more comfortable with AI you could increase the amount.
  - Step 2: Generate outputs

- **Prompts to input the instructions**
  - Within the “”” is a question from a request for proposal that I'll need you to reference shortly. Once you've analyzed the question say ready.

  - Here are the guidelines for a grant we plan to submit. Please review the guidelines as I will have you reference them later.

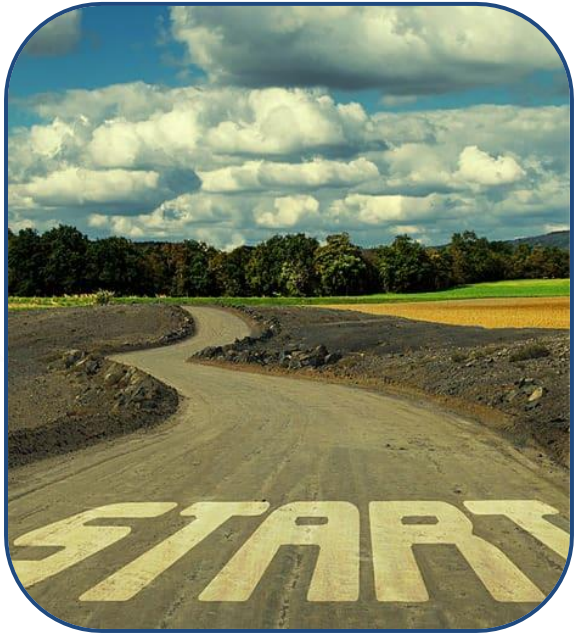
Adhering to Funder's Guidelines

- **Prompts**
  - Please review this needs section against the question from the request for proposal I just entered. Highlight any areas that do not align with the question or are missing. Provide specific recommendations on what could be improved.
    - https://chat.openai.com/share/25d20557-f03d-45e6-a55b-80c1c854f3e6
  - Can you help cross-reference the guidelines provided by the funder with our grant proposal to ensure all requirements are met?

Demo

Getting Started

- **For Beginners:**
  - Use the simple “act as a grant reviewer” prompt to analyze a single part of your proposal.
- **For Experienced Users”**
  - Use more complex “act as a grant reviewer” prompts. Include information about the funder and ask for strengths and weaknesses.
  - Test out 2-part prompts for adhering to funder’s guidelines



Previous Sessions

January 8, 2024
Demystify AI: Definitions & Considerations

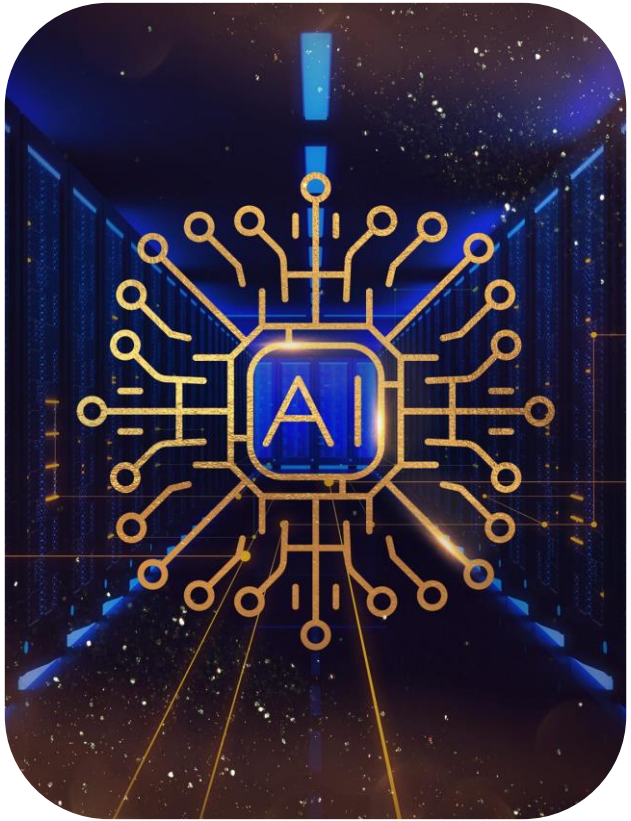
January 22, 2024
Using AI to Develop Grant Proposals

February 12, 2024
Using AI for Project Evaluation

March 6, 2024
Using AI to Edit Grant Proposals

Upcoming Sessions

March 25, 2024
Additional AI Uses to Support Your Development Work



Purchase individual previous sessions:

https://grantstation.com/product/webinar-recordings

Series Registration:

$175 (w/ $39 credit for today's session the cost is $136)

https://forms.gle/gzquuwxAaMaEQ1KQA

GrantStation
Your Fast Track To Funding

Questions?

Alice Ruhnke, President

alice@grantstation.com

David Gates, Director of Online Education

david.gates@grantstation.com

www.grantstation.com

877.784.7268

info@grantstation.com

Help Your Organization Get Noticed!

GrantStation Membership
$179 for 1 year
$249 for 2 years

Learn more here