

## Guidelines

Successful grant-writing involves solid advance planning and preparation. It takes time to coordinate your planning and research, organize, write and package your proposal, submit your proposal to the funder, and follow-up.

Preparation (planning and research) is vital to the grant-writing process. Solid preliminary work will simplify the writing stage. A well-written proposal follows the basic steps outlined below.

Organize your proposal, pay attention to detail and specifications, use concise, persuasive writing, and request reasonable funding. Make sure the grantmaker's goals and objectives match your grantseeking purposes.

Clearly understand the grantmaker's guidelines before you write your proposal. Always follow the exact specifications of the grantmakers in their applications, Requests for Proposals (RFPs) and guidelines.

Use these basic steps to guide you:

1. Prove that you have a significant need or problem in your proposal.
2. Deliver an answer to the need, or solution to the problem, based on experience, ability, logic, and imagination throughout your proposal.
3. Reflect planning, research and vision throughout your proposal.
4. Research grantmakers, including funding purposes and priorities, and applicant eligibility.
5. Determine whether the grantmakers' goals and objectives match your grantseeking purposes.
6. Target your proposal to grantmakers appropriate to your field and project, but do not limit your funding request to one source.
7. Contact the grantmaker, before you write your proposal, to be sure you clearly understand the grantmaker's guidelines.
8. Present your proposal in the appropriate and complete format, and include all required attachments.
9. State clearly and concisely your organization's needs and objectives. Write well; use proper grammar and correct spelling. Prepare an interesting, unique proposal.
10. Always cover the following important criteria: project purpose, feasibility, community need, funds needed, applicant accountability and competence.
11. Answer these questions: Who are you? How do you qualify? What do you want? What problem will you address and how? Who will benefit and how? What

specific objectives will you accomplish and how? How will you measure your results? How does your funding request comply with the grantmaker's purpose, goals and objectives?

12. Demonstrate project logic and outcome, impact of funds, and community support.
13. Always follow the exact specifications of the grantmakers in their applications, Requests for Proposals (RFPs) and guidelines.
14. Contact the grantmaker about the status, evaluation, and outcome of your proposal, after it is submitted. Request feedback about your proposal's strengths and weaknesses.

## **Preliminary Proposal**

Many grantmakers permit grant applications by invitation only, and require potential grant recipients to submit preliminary proposals in the form of inquiry letters in order to be invited to submit a **Full Proposal**.

Inquiry letters are designed to convince the grantmaker to consider your request. They provide you the opportunity to give the grantmaker a snapshot of your proposed project/program. Be sure to establish a connection between your proposal's goals and the grantmaker's priorities, and focus on detail, clarity, and conciseness, while conveying the impact your proposal will make on the need or problem you are addressing.

Your **Inquiry Letter** should condense all of the key information into the following main elements:

1. Organization Overview/Purpose
2. State Reason for and Amount of Funding Request
3. Describe Needs or Problem (including target population, statistics, examples)
4. Describe Project or Program
5. List other Project Funders (prospective and committed)
6. Request Funding Application

Typical inquiry letters, usually a maximum of 2-3 pages, include the following components:

**COVERSHEET:** Organization Name, Address, City, State, Zip Code, Country, Contact Name, Title, Telephone, Fax, E-mail Address

**INTRODUCTION:**

The mission of your organization (one paragraph)

The purpose of your request (one paragraph)

How your request fits the grantmaker's funding priorities (one sentence) Total annual general operating budget

Fiscal Year

Total proposed project/program budget (if other than general support)

Grant amount being requested

Matching funds committed from other funding sources

Proposed grant project/program time frame (beginning and ending dates) Tax exempt status

NARRATIVE (maximum of 1/2 page)

A concise narrative or a synopsis of the proposed project/program, that generally covers the following:

- The purpose of the request (project or program)
- The problem or need being addressed, and how you will address the identified problem or need
- The population or community served by your organization
- How your project or program will promote long-term change

#### FINANCIAL INFORMATION

For project or program finding requests, you will usually need to submit both a project/program budget and a general operating budget. However, for general support requests, you will usually only need to submit a general operating budget.

### **Full Proposal**

There are different forms and formats for full funding proposals. Every funder has different guidelines and priorities, deadlines and timetables. Some funders accept a Common Application Form (CAF), a single proposal accepted by a number of grantmakers to help grantseekers save time and streamline the grant application process.

Always follow the exact specifications of the grantmakers in their grant applications, Requests for Proposals (RFPs) and guidelines. Full Proposals are generally a maximum of 15 pages (single-spaced) and include a **Cover Letter**, **Cover Sheet**, Narrative, **Budget**, Qualifications, Conclusion and Appendices, as follows:

- Cover Sheet - a case statement and proposal summary;
- Needs Assessment - a concise demonstration of the specific situation, opportunity, problem, issue, need, and the community your proposal addresses;
- Program Goals and Objectives - a succinct description of the proposed project/program's outcome and accomplishments in measurable terms, and how it matches the funder's interests;
- Methodology - a rational, direct, chronological description of the proposed project and the process used to achieve the outcome and accomplishments;
- Evaluation - the plan for meeting performance and producing the program/project;
- Budget/Funding Requirements - a realistic budget with a detailed explanation of the funding request, committed matching funds, evidence of sound fiscal management, and long-term funding plan;
- Qualifications - your organization's background, its funding history, board involvement and staff qualifications, and its capacity to carry out your proposal;
- Conclusion - a brief, concise summary of your proposal;
- Appendices - additional attachments required by the funder, such as proof of tax- exempt status, organizational and financial documents, staff/board lists, support/commitment letters.

Present your full proposal neatly, professionally, and in an organized package. Type and single-space all proposals. Write, organize and present your proposal in the order listed in the application and guidelines. Only include the information and materials specifically requested by the grantmaker. The proposal is judged on content and presentation, not weight.

Unless required, do not include an index or table of contents, or bind the proposal, and be sure to sign it and submit the number of copies requested by the grantmaker.

## **Components**

In general, the cover letter is followed by the cover sheet, the narrative, budget, qualifications of your organization, conclusion and appendices, as follows:

1. Cover Letter (Overview of funding request)
2. Cover Sheet (Executive summary)
3. Narrative:

## Needs Assessment Goals and Objectives Methodology Evaluation

4. Budget (Administrative & program costs)
5. Qualifications (Applicant credibility)
6. Conclusion (Summary)
7. Appendices (Support materials)

In addition, grantmakers sometimes require a narrative of budget items, long-term funding sources, and an empirical analysis.

### **1) Cover Letter (one page)**

Provide a clear, concise overview of the organization, purpose and reason for and amount of the funding request. Be sure to show how your proposal furthers the grantmaker's mission, goals and matches the funder's grant application guidelines. Cover Letters should be typed on letterhead.

### **2) Cover Sheet (1/2 page)**

Also called an executive summary, this case statement and proposal summary is the most important component of your proposal. Summarize all of the key information and convince the grantmaker to consider your proposal for funding. Introduce your proposal, present a clear, concise summary of, and the visual framework for, the proposed project/program, and include: Applicant contact information, purpose of the funding request, need/problem, objectives, methods, total project cost, amount requested.

### **3) Narrative (10-15 Pages)**

#### **a) Needs Assessment (Problem Statement) (3-4 Pages)**

Objectively address specific situation, opportunity, problem, issue, need, and the community your proposal addresses. Support your statement with qualified third-party research/evidence to justify the need or problem. Clearly, concisely demonstrate that a relevant, compelling problem or need exists, and include the following:

1. Description of target population.
2. Definition of community problem to be addressed and service area need.

#### **b) Program Goals and Objectives (1 - 2 pages)**

Describe the outcome of the grant in measurable terms, in a succinct description of the proposed project outcome and accomplishments, including your overall goal(s); specific

objectives or ways in which you will meet the goal(s). Program Goals and Objectives should include:

1. Minimum of one goal for each problem or need in the problem or statement.
2. Description of the benefiting population.
3. Performance - the action which occurs within a specific time frame at an expected proficiency.
4. Process - the method by which the action will occur.
5. Product - the tangible results from the action's performance and process.

### **c) Methodology (4 + Pages)**

Describe the process to be used to achieve the outcome and accomplishments, in a rational, direct, chronological description of the proposed project; actions that will accomplish your objectives; impact of your proposed activities, how they will benefit the community and who will carry out the activities; time frame for your project/program; long-term strategies for maintaining the on-going project/program. Methodology should include:

1. Restatement of problems and objectives.
2. Clear description and explanation of program/project scope and activities.
3. Sequence of activities, staffing, clients and client selection.
4. Time line of activities.

### **d) Evaluation (1 - 2 Pages)**

Determine the plan for meeting performance and producing the program/project and justify how you will measure the effectiveness of your activities, who will be involved in evaluating and how they will be used; your measured criteria to produce a successful project/program; the expected outcome/achievement at the end of funding period. Evaluations should include:

1. Plan for evaluating accomplishment of objectives.
2. Plan for modifying process and methodology.
3. Provide methods - criteria, data, instruments, analysis.

### **4) Budget**

Clearly delineate costs to be met by the funder and all other funding sources; outline both administrative and program costs.

For specific projects, include separate budgets for the general operating and the special project. Show income and expenses in columnar form (according to general accounting/bookkeeping principles).

Delineate personnel costs for salary and fringe benefit information, and other-than-personal-services (OTPS) expenses for facility operating (rent/mortgage, utilities, maintenance, taxes), and travel, postage, equipment costs, supplies, and insurance, etc.

List actual committed and pending sources of income only. Include fees for service, government funds, corporate/private grants, individual donations, etc.

Prepare a detailed budget consistent with the proposal narrative:

1. Include project costs to be incurred at the time of the program's implementation.
2. Include no miscellaneous or contingency categories, include all items requested or funding, and all items to be paid by other sources, consultants.
3. Detail fringe benefits separately from salaries, detail all OTPS costs.
4. List separately all donated services, including volunteers, indirect costs where appropriate.
5. Sufficiently justify performance of the tasks described in the narrative.

## **5) Qualifications (1-2 pages)**

Describe applicant, qualifications for funding and establish credibility. Demonstrate the means and methodology to solve the problem, or meet the need, within 12-15 months, and include the following:

- 1) Organization identity and purpose, constituents and service area. Brief summary of organization history, mission and goals.
- 2) Brief description of organization current programs, activities, service statistics, and strengths/accomplishments. Long-range goals and current programs/projects and activities.
- 3) Evidence and support (including qualified third-party statistics) of accomplishments.
- 4) Number of board members, full time paid staff, part-time paid staff, and volunteers. Evidence of Board involvement, activity and key staff members qualifications and administrative competence.

## **6) Conclusion (1/2 page)**

Present a brief, concise summary of your proposal that states your case, problem, solution and sources/uses of project/program funds.

## **7) Appendices**

Additional attachments are usually required at the funder's discretion. Typical appendices generally include:

1. Verification of tax-exempt status (IRS determination letter).
2. Certificate of Incorporation and By-Laws.
3. Listing of officers and Board of Directors.
4. Financial statements for last completed fiscal year (audited, preferred).
5. Current general operating budget and special project budget (if applicable).
6. List of clients served (if appropriate).
7. List of other current funding sources and uses.
8. Biographies of key personnel or resumes (only if requested).
9. Support letters or endorsements (limited number).
10. Commitment letters from project/program consultants or subcontractors (if applicable).
11. Diagrams for equipment or schematics for building requests (if applicable).