Writing a Winning Grant Proposal
Tips to Follow. . . Mistakes to Avoid

By Susan R. Paisner

The task of writing a proposal can be thought-provoking, onerous, time consuming, even tedious. But what it should never be is scary. Like any project, there's always more involved than what's on the surface. For instance, you might need someone in another department or agency to provide the authorizing signature, or you might need letters of support from participating community partners. But the bottom line is that it's your job to write this proposal. Your goal, therefore, is to be as efficient as possible, eliminating surprises or problems as you move along. While there are no guarantees that what you write will be funded, there are still a number of steps you can take to present the best application possible. Then, let the funding chips fall where they may.

TOP FIVE TIPS

Tip #1: Follow the directions

This instruction cannot be repeated enough. In every interview conducted for this article, the need to follow directions and answer the request for proposals (RFP) was the first and most-often mentioned proposal writing tip. This means not only following the subject matter requirements, but the formatting ones as well. Do not underestimate the importance of following instructions- proposals have been discarded because an applicant didn't sign the original with blue ink.

Answering the RFP is step number one according to a veteran grants program manager for the U.S. Department of Justice (DOJ)."Whether you agree with the formatting instructions, the federal agency has decided they're important. If you don't follow them for some reason, you can do yourself a lot of damage." And, with so many federal proposals now being submitted online (see *What's new?),* funders can easily check to see if there really are one-inch margins and 12-pointtype.

"A lot of people will just skim the directions and miss very important parts, or they'll assume that the RFP will be the same as the year before," said Bonnie Barnhart, executive director of Bethany Village in Anna, Ill., a family crisis resource center with transitional housing for homeless women and children. "You have to read, read, read the RFP and follow, follow, follow the directions," said Debra Stafford, manager of research and publications for the Maryland Governor's Grants Office. "A lot of proposals will be disqualified if the t's aren't crossed the and the i's aren't dotted exactly as it's outlined in the RFP."

Tip #2: Don't promise what you can't deliver

If you believe you can train a total of 50 people over the course of the 12-monthgrant, say you'll train 50 people. Better to promise 50 and train more than to promise 75 and fail to meet your goal. Another key point: Funders want to see multi-disciplinary community partnerships. So-called "partnerships" that have been developed for the sake of the proposal may not make the grade. The DOJ grant manager described one meeting he attended where the community "partners" were introducing themselves to each other for the first time.

Tip #3: Plan your program thoroughly and tell the whole story

If you are trying to obtain funding for a full-service school with integrated health and mental health services, don't just write about your after school program. From another perspective, if you -have a $100,000 vision but are applying for only a $10,000 grant, explain the connection between those two amounts. But, be careful in telling the whole story - you don't want to include superfluous information. "If the funder asks for the number of homeless persons in an area," said Bethany Village's Barnhart, "that doesn't mean they want to know the number of kids with reduced lunches."

Tip #4: Make your proposal neat and presentable

Messy, ugly, and sloppy will never win the day. Remember, this proposal is your only opportunity for reviewers and funders to meet you, and it must have standalone quality. The more it's filled with typos and is internally inconsistent, the greater the likelihood you won't get any money. One way to avoid this is to proofread, proofread, and proofread again.

Tip #5: Make the deadline

A deadline is not a *suggestion* - it is a mandatory time and date by which your proposal must be submitted. While there may occasionally be a funder who has some degree of flexibility or autonomy and can waive the deadline, 99 percent of the time if you miss the deadline, you miss everything. There are no do-overs and no second chances.

BIGGEST MISTAKES

Have you ever written what you think is a terrific proposal, and it fails to receive funding? Maybe it's because you made one of the following mistakes:

1. Didn't include passion

There's just one place for feature writing in a proposal, and that's in the statement of need. If you don't convey an earnestness and a real need there, no matter how well thought out your proposal, you may still not be funded. Be sure, however, to put in only the facts and sources that support your claim. Too many and too much will dilute your passion, not augment it. "In the narrative portion of the application, the applicant really needs not only to tell the story, but to sell it," said Stafford.

2. Didn't make the case

You didn't say enough, or you said too much. Other mistakes include not providing sufficient Background information or the source of statistics, or the relationship of certain statistics to other proposal sections. "The narrative needs to be very clear and brief," said Stafford. "You don't want the funder to have to wade through a lot of ancillary information to try to get to your needs statements."

3. Applied regardless of funding guidelines

Don't try, in the words of a Maryland state proposal manager, to "chase the money."That means don't try to make a round peg (your program design) fit into a square hole (the funder's RFP). The DOJ grants program manager stressed this repeatedly: "The most fundamental mistake is applying for something that really isn't a good fit for [what] you want to do." Stafford said, "A potential applicant cannot look at a program and try to make their mission and their objectives fit into an RFP that obviously is not consistent with the mission and objectives of the funder."

4. Budget didn't add up

It's not enough to check your numbers in the budget section to make sure they add up correctly. You must also check your program plan against your budget numbers. For example, do you specify one project manager, one coordinator, and one administrative assistant in your methodology, yet you have budgeted only for the project manager and administrative aide? "I've reviewed applications where it's so difficult to match the narrative to the budget and I just rate them very low," said Stafford. "If they can't communicate the narrative and have the associated budget correct, it makes me question their ability to carry out the project and if they even know what they want to do."

5. No one proofed your proposal before you submitted it

Everyone makes mistakes, and that includes you. But when you proof your application, you should examine it for content as well as for typos. Plainly stated: Does it make sense? Do your facts support your claim of need? Does your program plan mesh with your goals and objectives? If what you've written makes anyone say, "I can't figure this part out," better it should be someone you know than a funder. "Have someone who is not familiar with your program or the RFP critique the application," said Stafford. “Because if that person can understand and follow it, the reviewer will be able to understand and follow it."

WHAT'S NEW?

The federal government offers http://www.grants.gov.the place to go for information about funding opportunities. According to any number of experts, this increasingly user-friendly website has made finding and applying for grants easier than ever. States such as Maryland have also developed a grant-related website (http://www.gov.state.md.us/grants.html)to coordinate funding activities for all 24 state agencies, and to provide technical assistance in many different areas of grants.

Not new, but increasing in importance, are evaluation tools. "It's a big thing these days," said the DOJ grants official. "Demonstrate you recognize the importance of performance measures. Lay it out up front, saying, 'Here's what we're going to do to show you we're succeeding with the federal dollars.'" Stafford agreed. "How will the applicant measure and evaluate the success? If funders can't see that an evaluation plan is in place, you will not be funded," she said.

The federal funder also advises "staying current on the kinds of buzzwords and topics that really catch people's eyes these days. Certainly faith-based programming and coordinating with faith based

organizations are big these days, "he said, adding that multi-disciplinary collaboration is also very important.

"THE BEST OF ALL WORLDS"

From a veteran U.S. Department of Justice grants official- this is a candid nutshell description of the best of all possible worlds when it comes to proposals and grants.

"We don't want to send dollars down to some community with a great idea and then have it fail at implementation. Not only does the project fail, but it casts doubt on the quality of the idea to begin with.

"Think about how your project is not only going to benefit you, but will also benefit the federal agency that will fund you. These grants are all viewed as investments by the agencies that are putting dollars down. "A stellar grantee makes me look good, my boss looks good, and the rest of the Executive Branch look good. That's the best of all worlds. You get the visibility, you're doing something that works, that you can demonstrate works, you're doing good, it makes everybody locally look good, and it makes the federal agency look good - it's a good investment all around."

GLOSSARY OF TERMS

Proposal writing has a vocabulary all its own. Here are a few of the key proposal elements, with a "standard English" translation.

RFP: "Request for Proposal" (RFP) or "Request for Application" (RFA)is how agencies announce the availability of funds related to programs, otherwise known as "grants."
Statement of Need / The Problem: The big picture of why your agency or organization needs grant money.
Goals and Objectives: A list of measurable results you hope to achieve through your grant program.
Organizational Capacity: How your agency's or organization's background qualifies you to manage the grant.
Project Plan/Methodology: The precise steps/actions you will take to manage the grant.
Timeline: Graphic illustration ofthe entire program plan that specifies when (i.e.,what week or month) activities (such as developing a brochure or holding a community forum) will take place.
Milestones Chart: Graphic and/or text illustration that focuses on specific, single deliverables (e.g., completed brochure, month 3).
Budget: A line-item list of what every element in your program will cost.
Budget Narrative: The addition of nouns and verbs to your budget numbers.
Budget Justification: How your budget costs were achieved and why you included the line items you did.
Evaluation: Your plans on how to ascertain whether you have achieved your stated results.

THERE'S MORE

You can never have enough helpful hints. Here are a few more. Make sure you are eligible to apply. Eligibility requirements are listed in the RFP. Look before you leap, because you hardly want to spend all the time a proposal requires only to find out you could not apply in the first place.

Develop guidelines for proposal production. This includes writing down who will write what, who is responsible for ensuring that all forms are signed, and who will be the singular designated individual to work at the keyboard. If more than one person will write the initial draft, each can submit text via a disc or electronically. But once the first draft is done, only one person should be allowed to access the document.

Identify competent staff. If an RFP calls for a project manager with five years' experience in training, do not select someone who fails to meet those requirements. Funders want to feel comfortable that the person running the grant knows the subject matter territory. When it isn't possible to find someone who meets every requirement, try to identify a person who meets most of them and has peripherally related experience for the rest.

And the most important part of any proposal is: Don't make the reader work. Keep your application clear, clean, thoughtful, and eminently readable, making it flow from section to section. Ask yourself: Is it easy to follow? If it is, send it in. If it isn't, it's re-write time.
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YOU'RE ON YOUR WAY

You're embarking on a journey that will tax not only your mind, but your time and patience as well. But, in the end, this may be one of the most rewarding journeys you've ever begun. This is a journey of writing a grant proposal, and your destination, ultimately, is the receipt of grant funding for your organization's project. Having a map as you embark on this journey will be invaluable. If you've never sought funding or written a grant proposal before, your first question, undoubtedly, will be "Where do I start?"

Begin at the beginning. This guide will take you through all the steps, starting with researching possible funding sources. And, remember, failing to receive funding isn't a reason to quit. You'll have a good start if you've already written one proposal, and you can use it as a basis for your next one.

Convincing a funder that you are worthy of their financial support can be a daunting task, but Quinlan's Writing *The Winning Grant Proposal* will give you the road map you need. From the dos and don'ts of grant writing, to a step-by-step process on filling out applications, this guide will answer most of your questions as you move through the process.

Don't let a "no" slow you down. Be persistent in looking for new opportunities to fund your program and perfect your proposal. Use this guide as a reference, and share your success story with us when you achieve your goals. Best of luck!

THE 3 MOST IMPORTANT RULES OF GRANT PROPOSAL PREPARATION

Rule No.1 – Read the Instructions

Most proposal shortcomings can be traced back to an inadequate review of the application instructions, whether related to your budget, narrative, or the length of the application.

Answering the RFP (request for proposals) means responding precisely to each section and including all appropriate criteria. It does not mean reiterating its language. For example, if an RFP requests that you develop a training curriculum, do not just write that you will develop a curriculum. Instead, write about the curriculum, and include details on such aspects as format (two-day or roll call training modules); training design (participatory, lectures, guest panels);course content (specific pertinent topics); participant handouts (acquired through a literature search); and trainers (key selection criteria, such as previous experience in training). Always try to put on the reviewer's hat and think: "If I were reviewing these proposals, what would I like to see for an answer?"

Another important aspect about answering the RFP is responding to every question or form even if something is not applicable to your organization. If a form is not applicable, either call the funding agency and ask what you should do, or write a brief note on the form stating why it doesn't apply, then sign and include it in your package anyway. Often clerks, not reviewers, are the first to check your proposal submissions to make sure all required documents and forms have been attached. Don't run the risk of having your proposal disqualified because you failed to include everything the RFP asked for.

Rule No.2 - Don't Be Afraid to Ask

The federal government and organizations big enough to have full-time staffers make those staffers available to ensure the application process is as smooth as possible.

A staffer will take the time to respond to a legitimate question or concern from a grant writer. After all, it is in his or her best interest to answer questions as soon as possible. It gets all the required information in the *first* application submittal, without the time-consuming chore of collecting materials the grant writer didn't know to include.

Rule No.3 - Save Everything

Save every document you use - starting with the research for your needs assessment and ending with your proposal's conclusion.

Not only is background and statistical information useful when preparing your grant application, but it is essential once you have been granted funds and the evaluation process begins. Without a clear outline of the goals you have set, you will be unable to demonstrate your progress to the foundation. And demonstrated progress could mean future funding.

Keep in mind that it is becoming increasingly difficult to find a source that will fund a project completely, or fund it through a period of several years. Some, if not all, of your original background material will be useful in completing additional requests to augment your initial funding source. Following these three "simple" rules will make life easier for you.

INFORMATION TO HAVE AT YOUR FINGERTIPS

Since it is likely that you will be writing more than one grant proposal, it would be extremely helpful to you to keep the following information about your organization:

1. Mission statement
2. Case statement
a. history of the organization
b. demographics of the area your organization serves
c. budget
d. staff's credentials
e. proof of nonprofit status (501(c)(3) letter)
3. Press clippings
4. Awards

Keep each section in a separate file for easy access- and always keep the information current and updated. This will be invaluable when you come across a grant with a short deadline. By having this current information on hand at all times, you will save yourself hours of time in research and preparation.

Funding sources are limited and competition is intense. To help you plan more efficiently and target your requests better, here are the key differences in the philosophies and giving practices of foundations, corporations, and government agencies.

1. Foundations

Foundations are established to provide philanthropic support to the community. They're in the business of giving out money and are required by law to distribute approximately 5 percent of their annual assets to nonprofit organizations. Although grant sizes may vary greatly, all foundations have one thing in common: Their giving practices are determined by their particular philanthropic goals and missions. It is crucial that you become very well-informed about the foundation's philanthropic philosophy and specific goals.

Establishing a clear match between your organization's work and the foundation's mission is essential to successful grant seeking. Funding priorities are ordinarily made quite clear through annual publications. Research all of the information, and don't hesitate to call them to discuss and clarify their particular interests and the types of programs they fund.

2. Corporations

Corporations are in business to make money. They give grants to create good will, support their employees, and reap the benefits of their good deeds. They are likely to award grants to organizations whose populations and recipients have an interest in the corporation's products. The growing trend among corporations is to give grants to nonprofits that operate in the same geographic area(s) as the corporation, and to organizations where their company employees volunteer. Establishing links between your organization and the corporation from which you seek funds is extremely important. You will have a definite advantage if you cultivate personal contact(s) and maintain ongoing communication with the corporation's key funding decision makers. Since corporate funding priorities are often more changeable and less clear than foundations, stay informed. And don't forget opportunities for in-kind contributions,

such as employee volunteers, equipment and supplies, use of facilities, etc., which corporations offer in addition to - or instead of - funds.

3. Government Agencies

The size of government grants varies greatly, although federal money distributed by states and cities tends to be quite large for programs that have already been determined as a result of public policy or law. Your role is like that of an outside contractor- helping to provide a set of services that fulfills a legislative mandate an agency is required to meet. Eligibility requirements for receiving funds from government sources are set and much more specific than from any other funding source. Don't waste your time if you're not an *exact* match. Getting funds from government agencies has everything to do with their level of confidence in your organization and your ability to carry out the specific program. You must meet the clearly defined requirements. The proposal and application process are the most intensive and time consuming of all. Proposals are sent to peer reviewers. Fortunately, government agencies are very accessible and will provide all the information and filing assistance you need.

YOUR FIRST STEP: RESEARCH

Research your project. Estimate the costs and length of time it will take to complete, then prepare a rough draft. Also, research your issue of topic in the current literature. Establish your organizational knowledge beyond the average person. This demonstrates to the funder that you have extensive understanding of the subject matter and would be a responsible candidate for this grant money.

Next, establish a list of prospective funding sources. Try to find five prospects for each fundable component of the proposal.

When you find a match, get as much information about the funding source as you can. Call to make sure your type of project is still a priority. Get a copy of the annual report to learn more about the funder's philosophy of giving and current trends in funding. Review their Form 990-Pfs on file at the Foundation Center to identify organizations that have received grants from that founder in the past. Call those organizations and ask grant recipients if they can give you any information that will help you win a grant.

ESTABLISHING AND MAINTAINING CONTACTS

Many people get so caught up in projects and work, they forget that philanthropy is about human relationships. Establishing and maintaining personal contacts is indispensable to successful fundraising.

The more communication you have with funders, the greater your chances of success. This is true *before* you submit your proposal, *during* the review process, and *after* your grant has been funded or denied. Here are some ways to establish and maintain valuable personal contact throughout the grant seeking process.

You should establish personal links with potential funders *before* your grant application is submitted.

Here are a few suggestions:

1. Clearly identify the philanthropic motives and interests of the individual foundations, corporations, and government agencies. Approach and work with them accordingly.
2. Develop and distribute literature about your project and organization - annual reports, brochures, news stories, etc.
3. Invite potential and current funders to participate in planned events, meetings, breakfasts, etc., that highlight your organization and its work.
4. Make connections. Find someone in your organization, or a friend of your organization who can introduce you to a board member, influential friend, or other contact at the foundation, corporation, or government agency.
5. Ask current funders to introduce you to potential new funders.
6. Communicate through the mail.
7. Make phone calls.
8. Meet in person whenever possible.

During the application review process you can continue to maintain contact with the funder.
Here's how:

1. Ask influential contacts to make phone calls or write letters on your organization's behalf.
2. Stay in touch. Update potential funders with all pertinent news about your agency, the particular project they are reviewing, status with other grant makers, etc.
3. If receipt of your proposal is not acknowledged within two weeks after mailing, call the contact person.
4. Acknowledge all the funder's correspondence promptly.
5. Send a thank-you letter promptly, whether your grant application is approved or denied.
6. If your proposal was not funded, find out why. Ask for the funder's input and advice. Stay in touch - send your annual report, news items, etc. Keep updated on the funder's philanthropic motives and grant making interests.

After your grant has been approved, maintain your contacts and keep the donor informed and a friend of your organization. This ongoing contact often leads to repeat gifts and should be the first step in your next fundraising effort. You should:

1. Develop and maintain a schedule for delivering financial and other reports to the funder.
2. Havekey representatives of your agency make personal visits to the funder's headquarters to talk about the impact of the grant.
3. Invite the donor and its representatives to visit your organization to see the grant's impact for themselves.
4. Agree on appropriate recognition and public announcements through press releases, annual reports, plaques, etc.
5. Send literature about your organization and the supported project on an annual basis at the very least.
6. Establish a group with special privileges and provide membership for funders and other important friends.
7. Update donors on all news and invite them to all activities. Keep them involved.

YOUR WORK SCHEDULE TIMELINE

Suggested number of working days (8 hours/day) per activity for writing your proposal (does *not* include research):

Writing first draft of the proposal - 7 days
Editing the proposal - 4 days
Corrections and changes (depends on the quantity) - 3-6 days
Re-editing - 2 days
Additional corrections and changes - 2-4 days
Proofreading - 2 days
Additional corrections - 2-4 days
Final proofread and check - 2 days
Photocopying - 1 day
Mailing - 5 days

Set up a work schedule by working backwards from the RFP deadline date. Add extra time if you have to mail the proposal. Develop a detailed timeline that includes due dates for text, editing (if applicable), corrections and changes, re-editing, proofreading, and photocopying.

Allow time to complete application forms; have transmittal forms and letters signed; make or print covers, spines, or tabs; and assemble final copies.

Also keep in mind: There can be only one proposal manager for any proposal. If two people have authority to direct workflow and word processing, you will end up with two different products and a risk of missing your deadline. When working with multiple authors, distribute only printed text (not computer discs) for authors to review and mark up. Never cut and paste text. Tell your authors to draw arrows and write clear messages instead. Do not allow anyone other than designated word processors to work with computer disks. Begin writing your proposal 37 days prior to the RFP deadline.

THE BASIC DOS AND DON'TS OF WRITING EFFECTIVE GRANT PROPOSALS

While there are no methods that guarantee success in winning grant funding, a written proposal is usually essential- especially if you visualize it as a plan of action. Putting your energies into presenting a solid, detailed case within your grant proposals is time well-spent. Funders specifically look for a complete, thoroughly developed proposal where there are a minimum of questions. The following suggestions should help you avoid some of the traps grant writers find while seeking funding.

The Dos of Grant writing

1. Assume the people who will review your proposal are of good will and looking for quality.

If they are accessible and you have reasonable questions about preparing a proposal, ask your questions.

2. Take advantage of face-to-face meetings with potential donors whenever possible. A site visit, for example, gives you the opportunity to show prospective funders your clients or participants, board members, volunteers, and facilities.

3. In the proposal itself, be thorough, reasonable, and positive- don't be hesitant or quarrelsome.

4. Know your funding source. They all have biases; some favor research, some favor action. Almost all will have a track record. Study it, and tailor your proposal accordingly.

5. Know your turf. Find out who else in the community is working on the problem you are addressing and what other approaches have been tried. Wherever feasible, form coalitions with other agencies and emphasize program coordination.

6. Follow the outline. When a proposal outline is suggested by the funder, use it, even if you think yours is better.

7. Write clearly. Proposal reviewers usually have to read dozens of proposals in a short period of time. They appreciate direct statements; they are exasperated by cleverness. Taking 10 pages to say what could be said in one will create resentment for wasted time and energy.

8. Be logical and balanced. The proposal should flow and conclusions should be reached, not jumped at. The length of sections should reflect their importance in the proposal.

9. Be specific. Specify numbers, sequences, and outcomes. Include flow charts detailing the timing of your initiatives, and allow for start-up and phase-in. Quantify everything you can, without abandoning quality.

10. Be thorough. This is especially important on program administration, supervision, and monitoring. Funders like to know the money they are dispensing is going to conscientious and capable agencies. They need assurances professional standards will apply, even in an experimental program.

11. Critique your proposal before submission. Proposal writers, even good ones, have one common failing: They become enamored of their product. A proposal should be intelligible to a non-specialist; test your proposal on coworkers or friends. Heed their comments, even if it means a rewrite.

12. Be positive! Funders like winners, and a positive attitude in a proposal is a definite plus.

13. Have a sound budget. It is important that the presentation and accuracy show your professionalism and your attention to detail. An increasing amount of attention is being given to the relationship of cost to benefits along with the probability of continuing support and longevity of the program.A proposal is not an opportunity to obtain money to solve all your organization's problems. In fact, most funders frown on seeing requests for overhead, building, and equip one of those categories).

14. Keep the proposal attractive and readable. Print out your proposal double spaced even if the RFP did not require it. Single spaced text is difficult to read and uninviting to the eye. Use lots of white space and bullets. If warranted, use figures and charts. Keep a proposal easy to read. Put detailed information in the appendices so that people don't have to wade through excessive details in the body of the proposal.

15. Be consistent. Make sure that all your material is consistent both within a section and across all sections. A good method for achieving consistency is for one person to read aloud to another person, particularly when dealing with numbers. Does the timeline match the project design? Do you show a start-up time of three months in the timeline and five months in the project design? Does the phrasing in the budget narrative match the management plan? Are the costs the same in both the budget and the budget narrative?

16. Review, review, review, proofread, then review. Then proofread again. If funders find a typographical error on the cover of the proposal, they often don't bother to read what comes next. If the cover is sloppy, most funders won't waste their time on any other pages from that applicant.

17. Deliver the proposal with all its contents on time. Under most circumstances, you will not be allowed to add any new material (text, resumes, support letters) once you have submitted your proposal. You must therefore obtain all support documentation and finish all text before you assemble the package for photocopying. Set aside at least one full day to make all final preparations. If you plan to hand deliver your proposal, allow for error and do not do final preparations on the day of delivery. If you are mailing your proposal, send everything in one package. Investigate using an overnight mail company that guarantees delivery rather than trying to guess when the U.S. Postal Service might actually deliver your package. Another advantage to using an overnight carrier is your ability to track the document on the off-chance your proposal is not delivered when the company said it would be.

The Don'ts of Grantwriting

1. Don't argue with the funder's assumptions! If the funds are coming through an RFP, the RFP will contain a statement of the problem. Even if the statement is grossly misinformed, don't take issue with it; your "real" knowledge will not impress the funder. lf you can't ethically agree with the funder's assumptions, avoid going after that funder's money.

2. Don't philosophize. A proposal for a nutrition program is no place for a speech on hunger in the Third World. Avoid the implied charge that a funding refusal would mean the funder does not care about the problem.

3. Don't confuse your needs with client needs. It is understood that you need funds to keep the door open. It does not necessarily follow that awarding those funds will solve the client's problems. Only the client's needs offer the rationale for continuing to meet organizational needs.

4. Don't assume the reviewers know the problem or the program. Reviewers are frequently recruited to read proposals; they may be academicians, technicians, or members of the general public. Often, these people receive only the barest background on what they are reviewing. Avoid jargon and specialized acronyms.

5. Don't include surprises. Examples are personnel who show up on the organizational chart but are not mentioned in the text, or charges in the budget with no prior reference as to purpose or necessity. Many proposals go through the hand of a fiscal reviewer who thrives on finding inconsistencies and hidden charges.

6. Don't promise more than you can deliver. The numbers game is tempting, especially in competition, but play it cautiously. Inflated promises may impress a novice reviewer; but if someone with related experience is involved, *your* overstatements will be discovered and *your* credibility damaged. Besides, if

you do get funded and then fall woefully short *of your* proposed goals, *your* request *for* a renewal will be in jeopardy.

The following* is *a description of what you will need to include* in *your proposal:

The Cover Letter

The first paragraph *of* the cover letter should briefly summarize who *you* are, what *your* organization does, and how much money is needed *for* the project. The entire letter sets the tone *for* the proposal and should grab the imagination *of* the program officer. Aboard member, preferably the chairperson *or* officer *of* the organization, should sign the letter.

The Title Page

The title page should simply enhance the appearance *of* the proposal. It should include a title and - if necessary - a subtitle. It should also have the name *of* the funding agency, the name and address *of* the applicant, the date, and the amount requested (optional).

The Table of Contents

The purpose *of* the table *of* contents is to organize the material into a logical sequence and provide the reader with easy access to sections under review. The headings and subsections listed in the table *of* contents should be duplicated within the body *of* the proposal.

The standard *form:*

- Roman numerals *for* each major section
- A capital letter *for* each subsection
- Arabic numerals followed by lowercase letters

The prospectus *for* government proposals usually outlines the format to be used in outlining the information contained in the proposal.

Abstract

The abstract's purpose is to briefly cover the highlights within the proposal. This section is critical as it is often the first thing read and maybe the only section used. It is often used to separate fundable proposals *from* those that do not fit the foundation's current priorities. You can help the reviewer gain an instant understanding *of* the issues, objectives, and cost *of your* proposal with a well-written abstract. Prepare the abstract *after* the proposal is completed. The abstract may be used *for* a preliminary review *of your* funding request. If the project interests the funders, they may ask *for* a full proposal.

Introduction

The purpose *of* the introduction is to introduce *your* organization to the funding source. This section captures the essence *of* who the applicant agency is, what the applicant agency does, and why the applicant agency is exemplary, unique, and one-of-a-kind in the delivery *of* its services. It also sets the identity of the grant applicant apart from the fiscal agent, if another organization is going to serve as the

fiscal agent. You should give the funding source a positive image of your organization. Begin with a strong opening sentence.

Need Statement or Problem Statement

The purpose of the need or problem statement is to justify your need for a grant from the funding source - it builds the case for support. It's the reason you are applying for the grant. Remember that this section is a primary factor in deciding whether or not your agency will be awarded a grant, so describe the need or problem clearly. The problem may be described in terms of the population, using demographics or a psychological profile, or geographically, as related to a given community or region.

Goals and Objectives

The goal describes the anticipated outcome. It can be written in more eloquent terms. The objectives are measurable outcomes that relate to the goal of the project and should be written in precise, measurable terms using words such as: to increase, to reduce, to improve. You should not confuse objectives with the methods you plan to use to achieve your objectives. Methods are the means. You would use words such as: to create, to establish, to conduct. The statement of the applicant's goal and objectives should answer the following: **Who** will do **what for whom, and when** and by **how much?**

Plan of Operation or Program Design

The purpose of the plan of operation or program design is to provide the funding source with a plan for implementing the proposed project. You would include your methods (or steps) for implementation in this section. You're answering the question, "How am I going to achieve my objectives?"

Key Personnel

The purpose of key personnel is to provide the funding source with an overview of the agency's capability to manage the project. This section includes a brief sketch of each key person's qualifications in relationship to the proposed program or project.

Commitment and Capacity

The purpose of commitment and capacity is to provide the funding source with insight into the applicant organization's ability to commit its human and/or financial resources to the proposed project. This section also addresses the applicant organization's fiscal capacity to administer a grant funded program.

Evaluation Plan

The purpose of the evaluation is to assure the funding source that you have an objective methodology for measuring and reporting the level of goals attained and objectives met for the grant-funded

Budget

The purpose of the budget section is to provide the proposal reviewer with a clear line-item explanation of how grant funds will be spent.

Proposal Review Checklist

Once your proposal has been written, let it sit on your desk for at least a day (longer if possible, or an hour if you're behind schedule). Then sit down with your proposal and this checklist to review it thoroughly one last time. Find someone in your organization who has been a part of the writing process to review the proposal with the checklist as well.

Overall Impressions

- Free of jargon
- Neatly presented
- Consistent
- Complete
- Logical sequence in presentation
- Conveys sense of urgency
- Proposed solution to problem realistic

Originality and Creativity

- Project is new and innovative
- Designed to eliminate or treat an existing problem
- Complements other activities in the community

Appropriateness

- Project fits the foundation's or agency's mission
- Project meets current funding priorities or program objectives
- Includes proof of applicant's 501(c)(3) status
- Within page limit established in RFP Abstract
- Identifies applicant
- States the problem
- Lists at least one objective and one activity
- Includes total costs, funds already obtained, and amount required

Introduction

- Describes who is applying for funds
- States applicant's mission
- Describes applicant's programs and activities
- Describes applicant's client base or constituents
- Provides evidence of the organization's accomplishments
- Tells how this project fits into the applicant's overall mission
- Tells the funder why it should fund *this* applicant instead of another

Need Statement or Problem Statement

- Problem is significant
- Applicant defends and supports the need for this project
- Shows *this* applicant could meet the described need if funds were available

Goals and Objectives

- Proposal contains specific objectives
- Objectives relate to the goal(s), the problem, and the need
- Project is feasible and timely
- Defines who will benefit and how
- Describes a *measurable* improvement in people's lives, the community, or the environment if this project is funded
- Lists the risks involved

Plan of Operation or Program Design

- Program activities are clearly described
- Activities coincide with the anticipated outcomes
- Activities are in a logical sequence
- Includes a timeline

Personnel

- Lists staff members
- Includes enough staff to carry out the objectives
- Staff have the qualifications and experience needed for the project
- Includes key staff's curriculum vitae

Commitment and Capacity

- Includes the names and affiliations *of* trustees and directors
- Trustees and directors are actively involved in the organization
- Trustees and directors have written letters *of* support for the project
- Includes information learned from consulting with other professionals in the field
- Lists any other public or private funding the applicant receives
- Describes contributions *of* board and staff members
- Identifies major contributors
- Informs funder that a grant could bring in additional gifts
- Tells how the project will sustain itself after the grant has expired

Evaluation

- Presents a plan for monitoring the project and/or evaluating it when it is done
- Describes who will carry out the evaluation
- Includes credentials *of* evaluators
- Includes levels to measure interim success or failure
- Describes contingency or corrective plans

Budget

- Budget is realistic
- Applicant agency is solvent
- Includes a copy of last year's financial statement, e.g., a balance sheet, income and expense statement
- Includes a copy *of* this year's board approved budget and next year's tentative budget
- Conforms to generally accepted accounting principles

- Demonstrates the applicant's competence in financial planning
- Contains a contingency plan
- Make sure the application arrived?
- If the application was rejected, was the funder called to find out why and the chances of getting a grant in the future?
- If the proposal is funded, has the gift been acknowledged?
- Will you maintain contact with funding source?

A Final Reminder

Definition: A funding proposal is a factual, straightforward document requesting money for a particular purpose or project.

The most effective proposal:
1. Is in the hands of the right funding source.
2. Gives evidence of careful planning in its preparation by your organization.
3. Conveys the importance of what you propose in a defined community setting.
4. Includes what your organization is doing to help itself, as well as what you are requesting.

Appendix

Includes all supporting documents referenced in the proposal narrative (e.g., a list *of* the board *of* directors and their affiliations; a list *of* key staff people and their qualifications; a copy *of* your operating budget, annual report, and IRS tax exemption certificate; newspaper clippings about your organization)

Includes a list *of* all appendix items

Is not overwhelming

Is logically organized

Mailing the Proposal

Verify the correct name and spelling *of* the company and the address where the proposal should be filed

Verify the name, title, and address *of* the contact person before submitting the proposal, making sure the person is still the appropriate contact person

Submit your proposal to the correct office. If you're filing with a large corporation, it could go either to a local representative or to corporate headquarters.

Follow-up

Has the program officer been called to