

2. Getting Organized to Write Proposals

Boilerplate Documents

The single most important activity you can complete to help the grantwriting process go smoother and more quickly is to gather together in one place the documents you'll use over and over again in the proposal submission process. These documents are called 'boilerplate' documents because they're used over and over again in your work.

If your grantwriting is done in the same place every time, a file drawer at your desk is a good place to organize the documents. If you work from various places, a portable divided file with a handle on top will be helpful. Either way, gather the documents *before* you're facing a deadline!

✓ **Most of these documents will need to be updated at least once a year. It's a good idea to note on your calendar a reminder to gather updated documents on the dates they become outdated.**

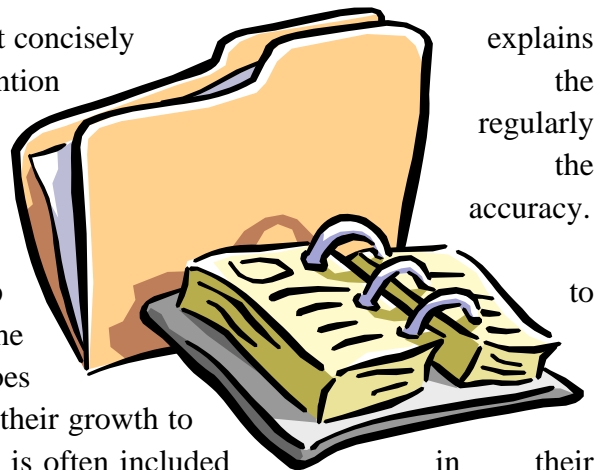
The documents you'll want to keep on hand include:

Mission Statement: This is a paragraph or two that concisely the reason your organization exists and may mention services or activities in which the organization engages. Your Board of Directors should create mission statement and review it annually for

Organizational History: This statement may be up several pages long. It traces the history of the formation of the organization and describes highlights and turning points that occurred during their growth to where they are today. Your organization's history is often included annual report, or you may have to create it from records.

Operating Plan: This is the written plan that outlines how your organization does business. It will often include a plan for the current year as well as a 3- or 5-year long-term plan. The top administrative officer of your organization or the President of the Board will usually have a copy or will be able to tell you where to find it.

If all else fails, the organization's Articles of Incorporation and Bylaws will give you a lot of



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information about the founders' thoughts and plans at the time the organization was formed. The accountant or bookkeeper should have a copy of the Articles of Incorporation and Bylaws.

Operating Budget: This is the annual budget for your entire organization. It changes every year, and it's different than the project budget you'll create for your proposal. Your bookkeeper or accountant will have a copy of the Operating Budget.

If you work for a very large organization, you'll also want to keep a current copy of your department's overall budget in addition to the organizational operating budget.

Indirect Rate: The indirect rate is calculated as a percentage of grant funds received that is intended to help pay for expenses not directly attributable to a particular function or product. These expenses are also known as 'overhead' or 'fixed expenses'. Not all grants allow indirect – if it's not allowed, the Request for Proposal (RFP) will tell you in the budget section.

Grantmakers sometimes define indirect expenses differently, so check the grantmaker's RFP or Grant Management documents, or ask the program officer. Indirect expenses may include business taxes, administration, utilities, security and some personnel costs.

The federal indirect rate your organization uses is generally based upon the negotiated rate negotiated between your organization and the federal government (IRS). Learn more about



federal indirect rates and how to obtain one at <http://www.dol.gov/oasam/programs/boc/costdeterminationguide/cdg.pdf>.

Organizational Structure: The best format in which to present your organization's structure is a



one-page organization chart or diagram. **MS Word** has sample organization charts in their templates. These charts show the reporting relationships for each employee or department of employees in the organization.

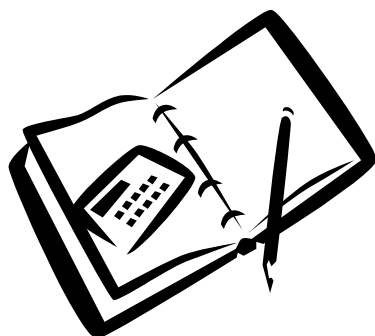
Audited Financial Statement/Balance Sheet: You'll want to keep a copy of your organization's most current audited financial statement and/or balance sheet in your files. This document describes and evaluates your organization's financial processes and lists 'findings' if anything is amiss.

Not all organizations perform 'outside' audits, which require paying an independent accounting firm to assess their financial practices and recordkeeping. Small organizations may perform internal audits of their books with staff or board members, or they may not audit their books at all (which is not recommended).

You'll hear the accounting term 'GAAP' referenced in grant documents, which means 'Generally Accepted Accounting Practices'.



Some grantmakers have policies preventing them from granting funds to organizations that cannot prove that their accounting practices are sound and meet GAAP standards through an outside audit.



IRS Tax Status Documents: This document is a certified letter from the IRS outlining your organization's federal tax status, i.e. a (501)(c)(3) non-profit designation.

Board of Directors List, with resumes and short biographies: These documents consist of a current list of your organization's Board of Directors along with current contact information for each. You should also keep an updated copy of each board member's resume. An organization's board membership is a strong reflection

of the level of community support that exists for the organization.

Create a one-paragraph biography for each board member from the information in their resume for use in documents with space restrictions. The 'bio' should contain a brief description of that person's background, as well as a statement of the expertise the person contributes to the organization – for example, accounting, legal, management or public relations expertise.

Staff Resumes and Bios: You should keep current resumes and one-paragraph bios for each staff member who will be working on a grant-funded project just as you do for members of your Board of Directors.

Other Documents:

Maps of Area or Region: A map of your state or region is helpful to put into visual perspective what the proposed service area will be.

Documentation of General Need: These documents will consist of reports and findings that substantiate the need for your program or project.



Use credible sources only; double-check any Internet source for accuracy.

Photographs, Charts & Graphs: These are visual materials to substantiate the need for and purpose of your proposed project.

Organizational Brochure & Annual Reports: These documents give an overview and also specific information about the function and programs of your organization.

Case for Support, Letters of Inquiry, and completed proposals: Developing a Case for Support or a Letter of Inquiry is the essential first step for developing a successful proposal. It will challenge you to demonstrate your commitment to pursuing the idea, provide the opportunity for you to organize your thoughts on paper, and identify the information, commitments and additional research necessary to create a winning proposal.

Completed proposals should be stored in electronic (CD) and paper formats. Some of the verbiage used in past proposals can be mined for future proposals. Your past proposal file should contain all or primarily funded proposals.

The Proposal Writing Process

✓ **Everyone approaches the grant writing process differently. I (Sharon) begin by putting the budget on paper as soon as I have a general idea of what the project will entail. Another person may need to ‘brain dump’ words, phrases, sentences and paragraphs about the project on paper in whatever order they come to mind in order to begin working. There’s no right or wrong way – but it will help you get started faster each time once you discover your own style.**



Even after thirty years of writing, I find that I still gather, gather, and gather information until I feel nearly panicked that I’m not going to have time to get the writing completed before the submittal deadline. It seems that only after that process can I force myself to sit down and begin writing. Once the first paragraph is down on paper, though, everything begins to ‘flow’ and the rest comes relatively easily. Your style will probably be different.

✓ **A common mistake new grantwriters make is assuming they can write a proposal in the midst of their normal work activities. Certainly the information gathering can be done**

simultaneously with other activities, but once you begin writing you'll want to find a location to hole up and work undisturbed.