

The Proposal Writing Process Workbook

Steps in submitting a complete grant proposal

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Introduction

This workbook is designed to help you wrap your arms around your program or project so that you can effectively communicate it to your supporters.

Throughout the following steps featured in this workbook, keep asking yourself, “Is my project feasible or am I creating an unrealistic situation?” For example, it is very easy to want to *create* a project to attract funding. Many funders today are interested in innovative and collaborative methods to achieve results. However, while focusing on the innovative and collaborative strengths, don’t lose site of the fiduciary responsibilities for the monies awarded. If your project is created in haste to attract funding but is unable to achieve that which was proposed, you will find yourself in an uncomfortable position.

To avoid such a dilemma, the following workbook will take you through the steps of developing a grant proposal. The grant proposal process in this workbook involves three steps; *identifying, developing, and submitting*.

Whether you or your staff write the grant proposal or hire a professional grant writer to do the job, this workbook will not only require you to answer the essential questions grantors ultimately want to know; but will also help you design a well-thought out program or project to address the need you’ve identified.

Simply download this workbook whenever a project or program comes to mind and follow the steps in producing your complete grant proposal.

Step One: Identifying the Proposal

1. What *need are* you trying to address?

2. **Who will benefit from the project?** (Be specific about the targeted population. Consider geographic location, economic status, age, ethnicity, race, gender, etc.)

3. What is the goal in meeting this need?

4. Who, within your organization, is responsible for attending to the identified need? (Isolate the department first, then the overseeing personnel, and lastly, the front-line staff responsible for delivery of the project.)

5. Do you currently have the expertise to undertake this project? Or will new staff be necessary? (If yes, is this feasible? Estimate cost.)

6. Is this a new, pilot or established project? (Keep in mind that the proposed project must be compatible with your organizational mission and purpose.)

7. Are there other organizations within your market segment that currently offer a same or similar project? If so, why is yours better? Or, will there be any collaboration between other organizations?

Step Two: Developing the Proposal

In step one, you've addressed the '*what*' (need /goals) and the '*who*' (project provider's and recipients). Now, the '*when, where and how*' must be established.

In this phase, **gather key people** who can lend critical input on the actual feasibility of the proposed project's operations. For example, you may want to gather your:

- CEO
- Finance Director
- Department Director as identified in step one
- Front-line staff responsible for delivering the service
- *Marketing/Development Officer

Now that you have identified the project' goal(s) in step one, answer:

- 1. How will the proposed project achieve its goal(s)?** (Define measurable objectives toward goal achievement. Keep in mind that objectives describe results not methods. This exercise addresses the benefits of the proposed project. In addition, discuss reasonable options for how objectives will be measured i.e. survey, data logging, etc.)

2. What are the costs associated with this project? Consider:

- Financial costs - start-up, materials, operational, sustenance, marketing / advertising, insurance, etc.
- Time – orientation to new project.
- Resistance to change (internal and external).
- Loss of collaborators.
- Increased competition

Itemize the total costs of the project, then, determine the amount being requested on the proposal. (**Full vs. Partial**). You may want to attach a separate itemized form to offer this information to the potential funder.

3. Will the project generate revenue? If so, how?

4. Where will this project take place? (Does the proposed project require new space, renovation or will it be offered in existing space?)

5. How many people will this proposed project serve? (Funders are generally interested in projects that serve large amounts of people in an economical way that provides social improvement. The coined phrase, “getting the biggest bang for the buck,” is applicable.)

6. When will this project take place? (Continually, periodically or perhaps, just once. In any case, be sure that whatever is being proposed can be achieved within the time period of the grant.)

7. How will this project be evaluated? Prior to implementing your project, you must determine how to evaluate it. Not only will your potential funders expect this but it will strengthen your proposal. Determine the projects inputs, throughputs, outputs, indicators and outcomes.

Definitions

Input: *All resources critical to the project before its start, such as equipment, materials, facilities, target population, key stakeholders and staff.*

Throughputs/

Activities: *The project's methods in using the resources to fulfill its mission.*

Outputs: *The immediate direct effects for the target population that will come as a result of applying the activities.*

Indicators: *The observable and measurable results indicative of the project's success or impact on an outcome.*

Outcomes: *The project's perceived benefits on the target population's lifestyle or the identified societal need; on both a short (1 to 3 year) and long (4 to 6 year) term basis.*

8. Who will evaluate this project? (Determine who, within your organization, will develop, distribute and collate information necessary to evaluate this project. This includes determining who will report results to the funder.)

9. How will the project be funded in the future? (Most funders are excited about seeding a new project, especially if they know that other modes of support are available to sustain the project.)

Step Three: Submitting the Proposal

Once steps one and two are completed, you (or a professional grant-writer) can then prepare your grant proposal. In addition to the information discussed previously, most funders will require copies of some or all of the following *organizational* information:

- A current list of the Board of Directors and their work affiliations
- IRS determination letter
- Form 990
- Most recent audit
- Most current annual report
- Charitable license
- Current operating statement
- 2 –3 endorsement letters
- Brochure(s)
- Newsletter(s)
- Letterhead

My suggestion is to prepare a folder of the above material to expedite the proposal submission process.

Research your funders. Asking for assistance in funding a children’s project will fail if you’re applying to a funder who only supports the senior population. Most funders will identify their criteria for funding. Read all applications thoroughly and know your funder’s mission statement.

Usually applications will provide the following information:

- Guidelines or criteria for consideration of funding.
- Range of funding amounts disbursed.
- Deadline for application.
- Proposal format.
- Number of proposal copies to submit.
- Presentation of proposal (no folders, no staples, etc.)

Sign this proposal. The application will usually call for the signatures of the Executive Director and the Board President. Plan ahead so that you are not trying to track down these key people at the last minute. Some will give their endorsement after hearing a brief summarization of the proposal while others will insist on reading the entire document. Again, plan ahead accordingly so that you are not in jeopardy of missing the application deadline.

Lastly, **include a cover letter** that includes your organization's name, a brief synopsis of this project and the financial amount being requested. This letter can be signed by either your contact person, your Executive Director or Board President.

Follow-up approximately two weeks after you have submitted this proposal to ensure receivership and show commitment toward your request.