# GRANTWRITER PRO™ MANUAL

## Introduction

G rant writing is a process; not just a single document called a proposal. It is a process of planning, researching, networking, and cultivation of prospective individual, foundation and corporate donors.

This process involves a synergy between the nonprofit and the prospective donor. It is a match between those who are seeking money and those who are giving money away. This match requires a coincidence of interest, and that requires the requesting organization to plan, research and network to cultivate prospective donors.

You must see your relationship with a prospective donor as a budding partnership. You may have ideas and the ability to solve problems, but no dollars with which to implement them. Individual donors, foundations and corporations have the financial resources needed to underwrite projects/programs. Bring these two together effectively, and the result is a synergy. That is the business of grant writing.

Grant writing is a step-by-step process. It takes time and persistence to succeed. After you have written a proposal, it could take a year to receive the funds needed to implement your project or program. And, even a perfectly written proposal may be turned down, no matter the merits of its purpose.

Grant writing is an investment of time and energy leading to a future reward. Your goal should be to create a group of individual, foundation and corporate donors who give small gifts on a steady basis - and a few which give large, intermittent, grants. By tenaciously implementing grant writing process every year, you can hold on to most of your small donors and find a balance with the inconsistent giving of large donors.

The grant writing process is not a rigid formula, neither are the components that make up a proposal a closed system. Both require a knowledge of the prospective donor being addressed so that they can be adapted to fit the criteria of that donor - each must be adapted to fit the needs of each situation. Proposal components may be labeled differently by every fund-raiser and/or organization. GrantWriter Pro™ presents components which reflect the needs of the broadest cross-section of potential grant seekers.
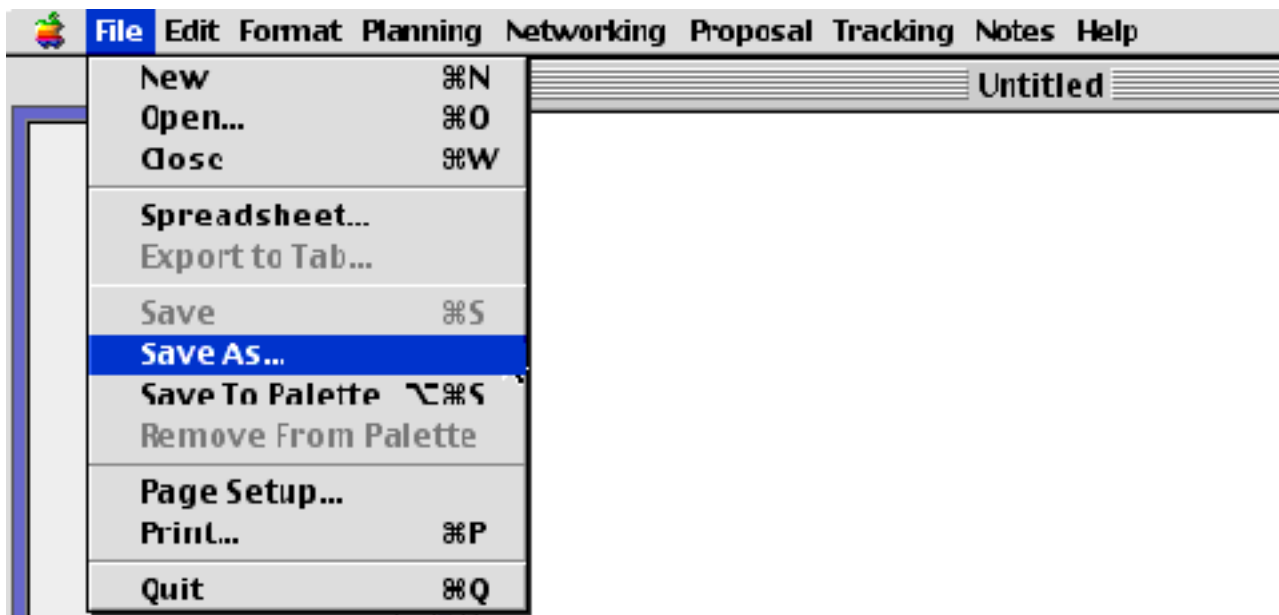
## GrantWriter Pro™

GrantWriter Pro™ is a grant research, planning and writing tool designed to help you in the grant writing process. The following tutorial in the use of the software is also a useful short course in grant research, planning and writing. A 50 page workbook is available which gives more detailed explanations and illustrations of the various functions, menus and components of GrantWriter Pro™.

## File, Edit and Format

The **File**, **Edit** and **Format** menu items allow you to create new files, edit, and format it using any font on your computer. Save your work to a file form and share it with staff, volunteers, and resource professionals for revision and editing. Such collaboration will have a dramatic affect on the fund ability of your project/program.

"Save to" allows you to choose where to put files anywhere on the disk or "Save to Palette" which saves them in a file in the "Data Files" folder and updates the data appearing in the Palette window. The shortcut for this command is Command-Option-S. We recommend that you "Save to" disk and "Save to Palette" each time you modify your files so that you always have a backup of your work.

# Spell Checking Plug-ins

**Spell Catcher 8 (Mac)** does it all in one application! It checks your spelling and punctuation interactively as you type. It corrects and modifies your writing using an extensive collection of writing modification modules such as form paragraphs, search and replace, statistics and more.

**Spell Catcher Plus (Win)** corrects spelling and punctuation. It also enables you to create macros which can manipulate text. It works interactively as you type, or in batch correction mode after you have finished typing.
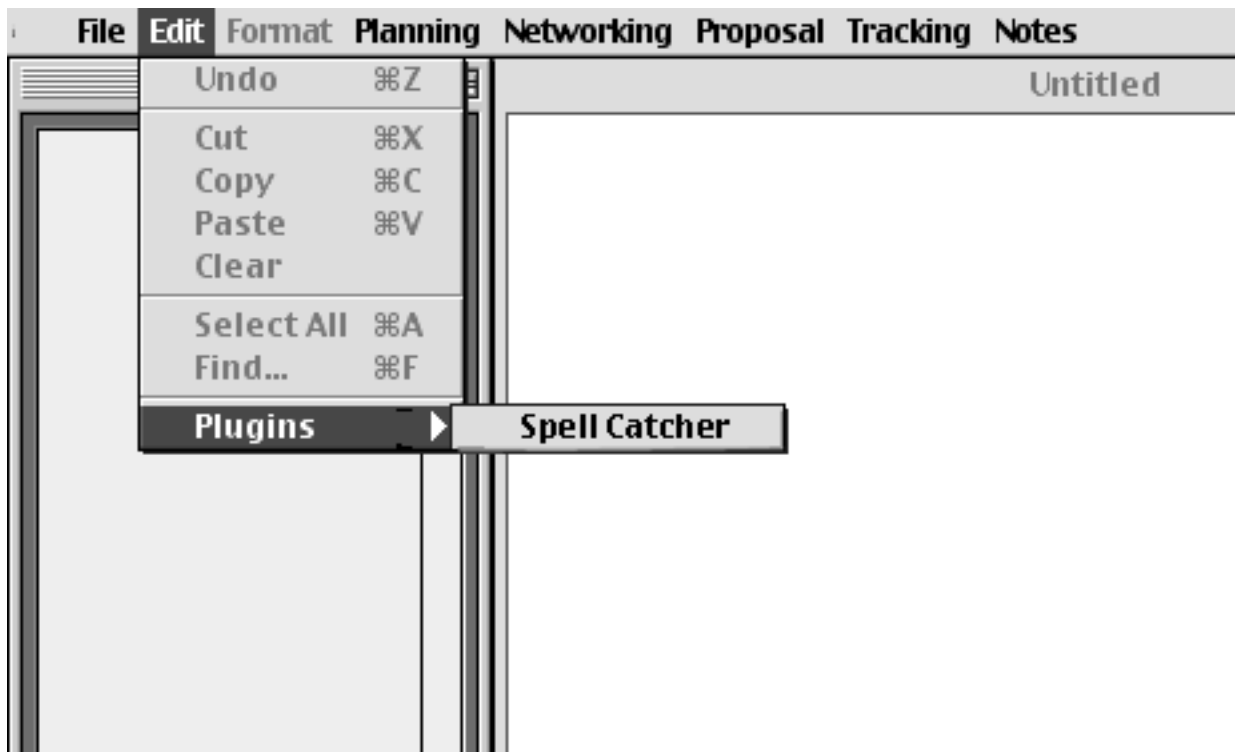
**Installation:**

**Mac** - Make an alias of Spell Catcher and place it in the Plug-ins folder of GrantWriter Pro™.

**Win** - Right click the Spell Catcher icon and choose "Create Shortcut".  Then drag the shortcut file to the Plug-ins Folder.
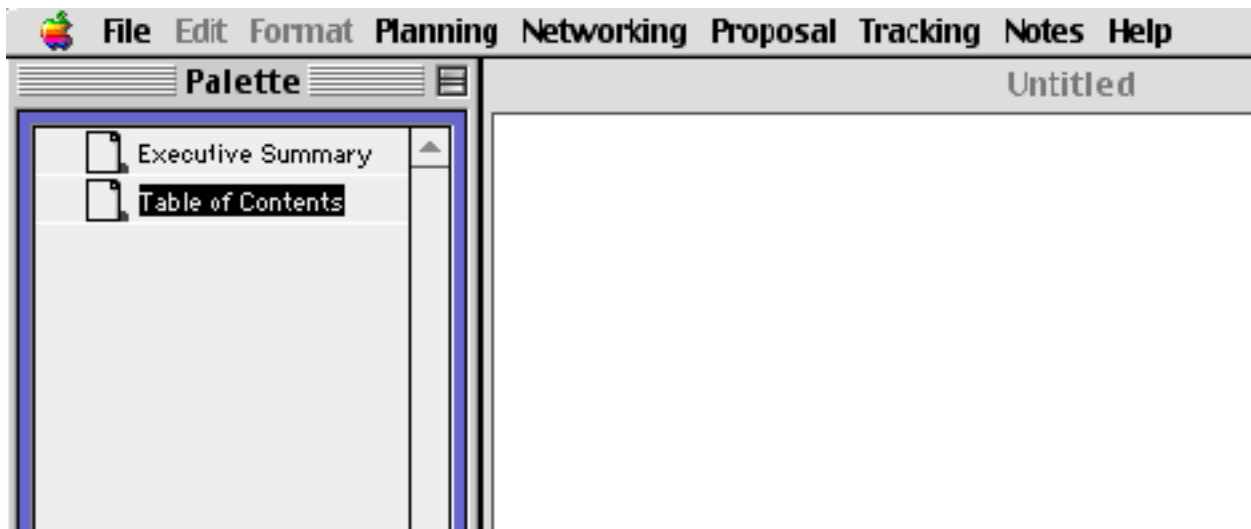
**How to Use:**

• Open the plug-in from withing GrantWriter Pro™.
• Highlight the text in the active word processing window.
• Spell check.
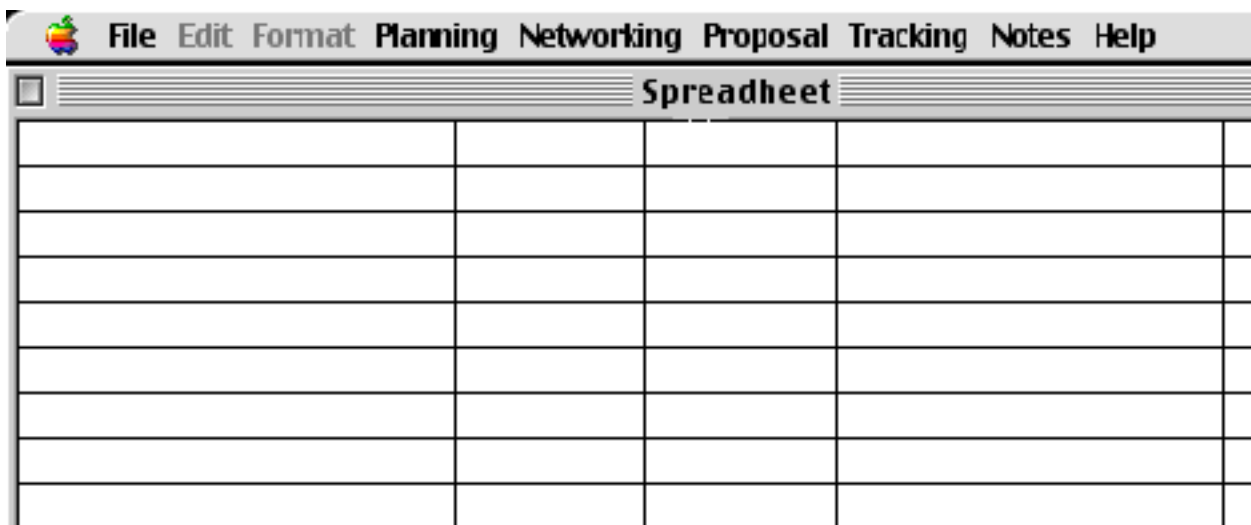• Paste in the active word processing window.

# Palette

The **Palette** allows you to save and store your components as you work on them in a desktop window for quick reference. Save them one at a time, either component by component, or as unitary document. Click on your stored document, and it opens in the text edit window ready for you to begin writing or editing.



# Spreadsheet

An internal spreadsheet allows you to work on a budget, and exchange files with others for easy collaboration. You can enter and save text to a file for sharing, or to the Palette for storage. The Export command allows you to export the spreadsheet in a tab delimited text file for import into a spreadsheet program, such as Excel, for more complicated processing.



The spreadsheet has columns labeled as A,B,C,D, etc... and the rows numbered 1,2,3, etc.

Example:
A1 B1 C1
A2 B2 C2
A3 B3 C3

Enter equations in the following format:
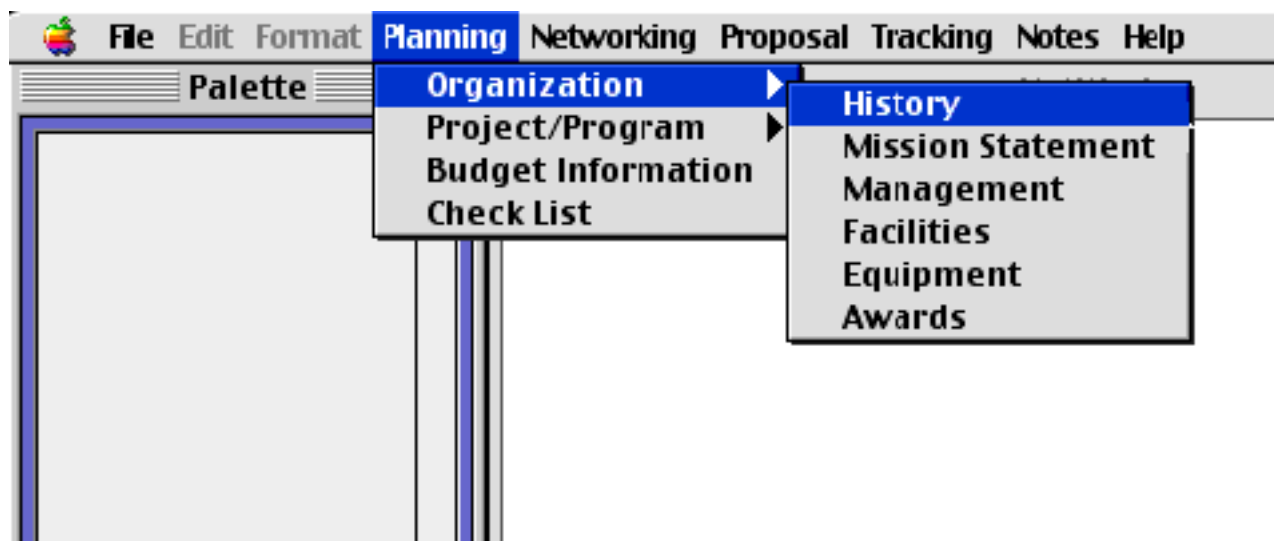
=B1+B2
=B1-B2
=B1*B2
=B2/B2

This will then put the function of B1 and B2 into the cell.

*Note: Make sure the = sign precedes the column labels and row numbers.*

# Planning

The Background menu item allows you  to gather the necessary background information to make the proposal conceptually sound. GrantWriter Pro™ organizes background information in the following way: **Organization, Project/Program**, **Budget Information, Check List**



*Note: Not all of this information may appear in the proposal itself, but your having gathered and developed it will help you to write a proposal that is much more convincing.*

If any of this information is not readily available, find out who can help you research and develop it. If you are with a small nonprofit with no staff, a knowledgeable board member might be of help. If you are in a larger agency, there should be program and financial support staff who can help.

Granttriter Pro™ lets you gather information from the sources you need using a format that insures uniformity of input, revision, and editing. Background data-gathering by staff and volunteers is made much easier using Grant Writr Pro's common interface.

## Organization

Organizational information is categorized into, **History, Mission Statement, Management**, **Facilities, Equipment and Awards.** In the application each of these elements has guidelines and an edit able window where you can store the background information you have gathered.

**History -** a brief history of your organization.
**Mission Statement** - a statement of the philosophy and the parent organization's mission.
**Management**
      **-** an organizational chart
      - resumes' and job descriptions of key staff members.
**Facilities** - a description of your organization's facilities.
**Equipment -** a listing of relevant equipment.
**Awards -** a list of awards received by the parent organization.

## Project/Program

Project/program information is categorized into, **Rationale, Target Group, Support**, **Commitment, Credibility and Realism.** In the application each of these elements has guidelines and an editable window where you can store the background information you have gathered.

**Rationale** - a description of the problem that the project/program is addressing.
**Target Group** - the group of people that project/program will be serving.
**Support** - what kind of support from your community does your project/program have?
      List of potential support letters.
**Commitment** - what demonstrates your organization's commitment to the project/program?
**Credibility** - list past project/program successes.
      What special skill do you bring to the project/program?
**Realism -** how many people will benefit and how?
      Does the project lend itself to statistical evaluation?
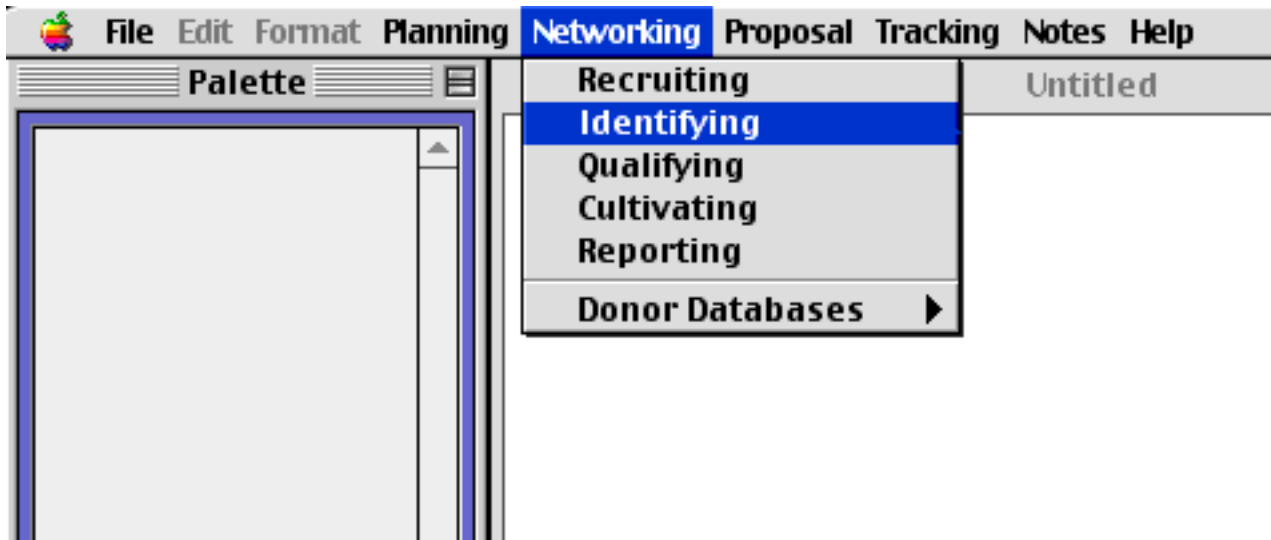      How will accurate records be maintained?

*Note: Research information gathered can be stored within the application.*

## Budget Information

You will not be able to pin down a budget associated with the project or program until the programmatic details and timing have been worked out.

The main financial data gathering takes place after the narrative part of the proposal has been written. However, at this stage you do need to outline the broad aspects of your budget to be sure that the costs are in reasonable proportion to the outcomes you  anticipate. If it appears that the costs will be prohibitive, even with a foundation grant, you should then scale back your plans or adjust them to remove the least cost-effective expenditures.

# Networking



## Recruiting Staff and Board Members

Guidelines for recruiting key staff, board members and respected outside experts in your community to partici-pate in planning, researching and writing your proposal.

Guidelines for recruiting key individuals who are willing to make major donor contacts.

## Identifying Prospective Donors

Guidelines for comparing your project/program's purpose(s) with the priorities and interests of the prospective donor. This information can be obtained directly from corporation or foundation or from the dBase Pro™ donor databases available with Grant Writer ro™.

## Qualifying Prospective Donors

Guidelines for  qualifying prospective donors.

## Cultivating Prospective Donors

Guidelines for designing a donor cultivation plan.

## Reporting to Donors

Guidelines for making donor reports.

## Donor Databases

**dBase Pro™** donor databases are custom researched from national sources at the time of purchase. Please check our web site: http://www.gwusa.net for details.
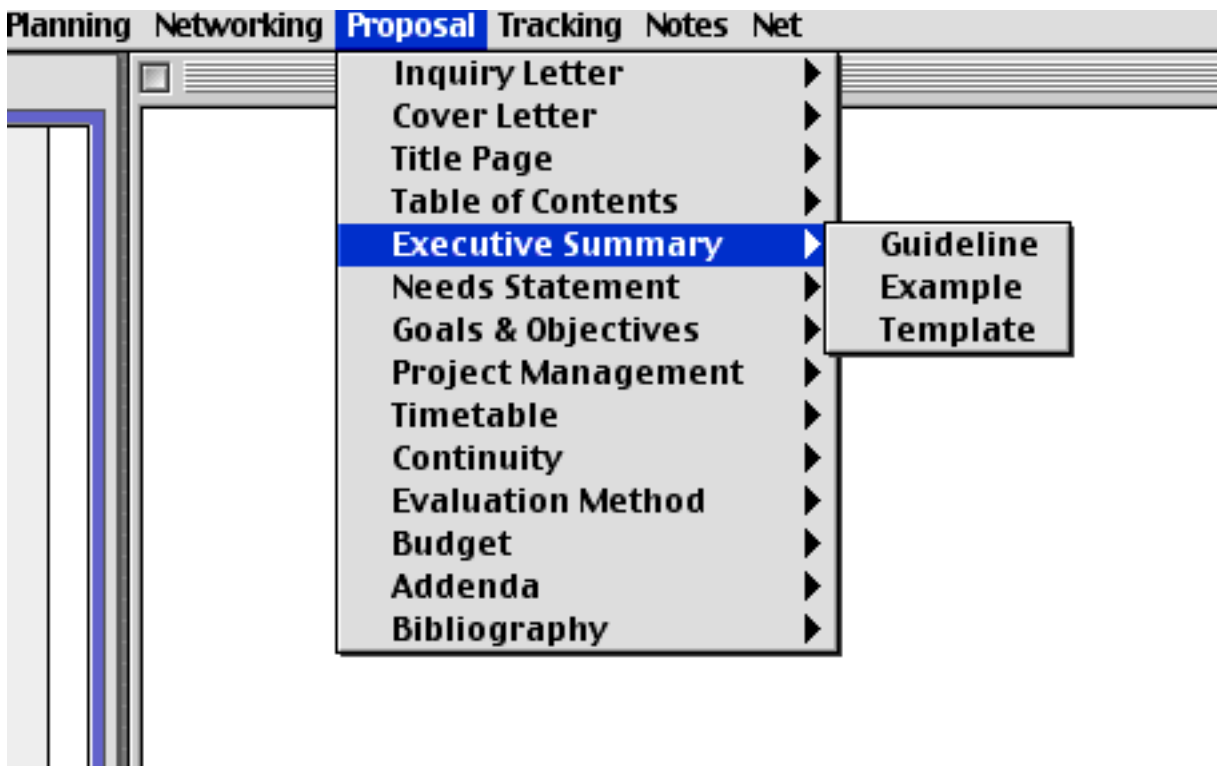
The information provided for each prospective donor includes:

**Name**
**Address**
**Telephone**
**Contact**
**Donor(s)**
**Type of grantmaker**
**Background**
**Purpose and activities**
**Fields of interest**
**Geographic focus**
**Types of support**
**Limitations**
**Publications:**
**Application information**
**Initial approach**
**Copies of proposal**
**Board meeting date(s)**
**Deadline(s)**
**Final notification**
**Officers and Trustees**
**Directors**
**Number of staff**
**Financial data**

Each of these elements is a line item entry in the database that can be dragged and dropped (Mac version only), or copied and pasted into the cover letter, any editable text window, or on to an envelope.

*Note: Additional databases can be purchased separately depending on the availability of project/donor area of interest.*

# The Proposal

The **Proposal** menu provides a **Guideline, Example** and **Template** for each standard component to enable you to write a professional proposal with ease.

| Planning | Networking | Proposal | Tracking | Notes | Net |

**Inquiry Letter** ▶
**Cover Letter** ▶
**Title Page** ▶
**Table of Contents** ▶
**Executive Summary** ▶    Guideline
**Needs Statement** ▶    Example
**Goals & Objectives** ▶    Template
**Project Management** ▶
**Timetable** ▶
**Continuity** ▶
**Evaluation Method** ▶
**Budget** ▶
**Addenda** ▶
**Bibliography** ▶

**Inquiry Letter -** a letter to a prospective donor to determine the eligibility of a project/program for funding.
**Cover Letter** - a short introductory letter.
**Title Page** - page giving essential details for presentation.

**Table of Contents** - names and page numbers of each section/component of the proposal in a line item format.
**Executive Summary** - who, what, when, where and how much.
**Needs Statement** - a statement and documentation of the problem addressed by the project/program.
**Goals & Objectives** - anticipated outcomes and tasks to be undertaken.
**Timetable** - the timetable for the project - when do tasks begin and end?
**Continuity** - the plan for the project/program to continue in the future.
**Project Management**
      **Administration -** financial management, project outcomes, reporting.
      **Staffing -** qualifications, and specific assignments of relevant staff.
**Budget -** line item budget tied to each task of the project/program.
**Evaluation Method** - measurable results which can be reported to the donor. Report schedule.
**Addenda**
      **Resumes** - resumes of key staff and volunteers.
      **Letters of Support** - letters from community leaders and professionals endorsing the project/program.
      **Determination Letter** - tax-exempt letter from the IRS
**Bibliography** - sources of information.

*Note: Your proposal and/or any of its components can be saved in text format for importation into a word processor such as MS Word™ or a page layout program such as Pagemaker™ or QuarkXpress™.*
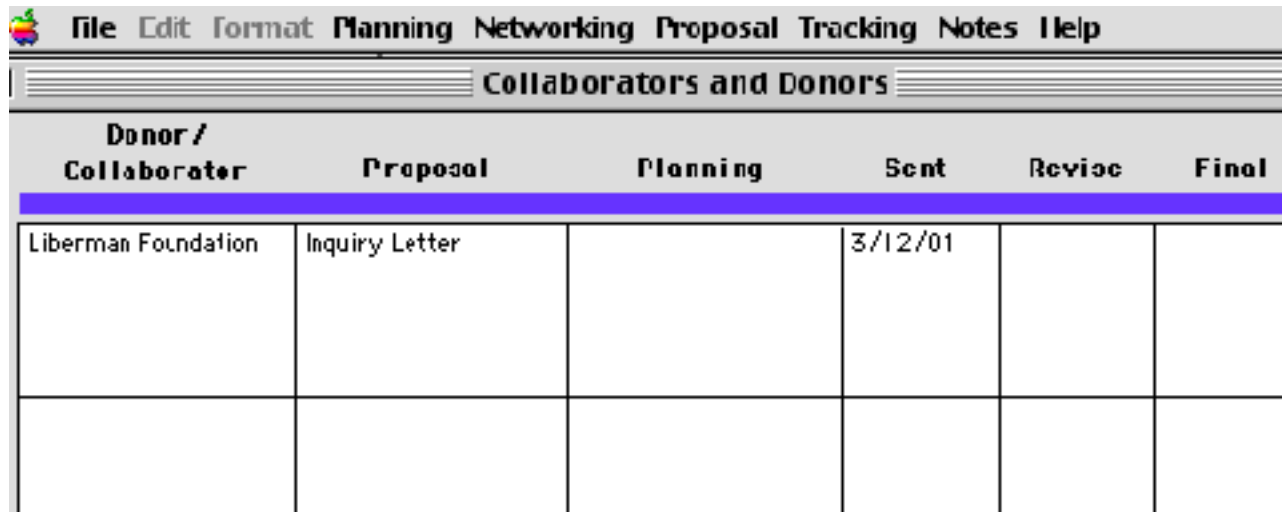
# Tracking

## Tracking collaboration:

Track proposal **collaborators**, **components** being developed, **background** information being researched, **date sen**t, **revision dates**, and **final date**. This feature is especially useful for small nonprofits and schools where background information has to be collected from outside sources and volunteers play a large part in the grant writing process. This is useful in order to track assignments and work flow internally.

## Tracking correspondence:

Track all donor contacts from the inquiry letter, the proposal submission, to the final report to a donor on the use of their grant monies.



| Donor / Collaborater | Proposal | Planning | Sent | Revise | Final |
|---|---|---|---|---|---|
| Liberman Foundation | Inquiry Letter | | 3/12/01 | | |
| | | | | | |

# Notes

The **Notes** window allows you to make notes while you are creating your documents. This information is saved automatically in the application, and can be copied and pasted into any component of the proposal or background element in the application.

## Summary

Submitting your proposal is not the end of the process. Grant review procedures vary, and the decision-making process can take anywhere from a few weeks to six months. During the review process, the prospective donor may ask for additional information either directly from you, or from outside consultants or professional sources. This is a difficult period for the grant seeker. You need to be patient and persistent.

If your efforts result in a grant, acknowledge the donor's gift with a thank you letter. You also need to find out whether the donor requires specific forms, procedures, and deadlines for reporting the progress of your project. Clarifying your responsibilities as a grantee at the outset, particularly with respect to financial reporting, will prevent misunderstandings and more serious problems later.

Rejection is not the end of the process. If you are not clear why your proposal was rejected, ask. Did the prospective donors need additional information? Would they be interested in considering the proposal at a future date? This may be the time to begin cultivating of prospective donor.

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