

WORKBOOK

Money for the Movement: Grant Writing Fundamentals (Rose Foundation Convening 2025)

By Dalya Massachi



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Part I: Introduction to Grant Writing



1. Assess Your Basic Information Readiness

Honestly assess your organization's information readiness to pursue and manage grants based on the **8 Information Essentials**. Use a scale of 1 (not at all) to 5 (completely). For each item receiving a rating of 1, 2, or 3, jot down notes to yourself with the details of what your organization is missing in each area.

I. Official Nonprofit Tax Status

1. We have all the required certifications.

Not at all	1	2	3	4	5	Completely	Notes

II. Clear, Unique Mission

2. Our mission is clear to an outsider.

Not at all	1	2	3	4	5	Completely	Notes

3. Our mission is articulated to describe our organization in a unique way.

Not at all	1	2	3	4	5	Completely	Notes

III. Active, Financially Supportive Board of Directors

4. Our board is assembled.

Not at all	1	2	3	4	5	Completely	Notes

5. Our board meets regularly.

Not at all	1	2	3	4	5	Completely	Notes

6. All board members contribute financially.

Not at all	1	2	3	4	5	Completely	Notes

IV. Appropriate Financials

7. We can produce appropriate financial reports.

Not at all	1	2	3	4	5	Completely	Notes

8. We can show that we are on solid financial ground.

Not at all	1	2	3	4	5	Completely	Notes

9. We can show multiple sources of support.

Not at all	1	2	3	4	5	Completely	Notes

V. At Least 1 Priority Program with Its Own Budget

10. We have set our priorities for the next 12 months.

Not at all	1	2	3	4	5	Completely	Notes

11. We have divided our work into separate programs/projects with realistic 1-year timeframes.

Not at all	1	2	3	4	5	Completely	Notes

12. We can explain exactly why our community needs these programs/projects at this time.

Not at all	1	2	3	4	5	Completely	Notes

13. We can outline clear program/project objectives and show plans for how we will get there.

Not at all	1	2	3	4	5	Completely	Notes

VI. Quantitative and/or Qualitative Evaluation

14. We can measure the quantitative results of our work.

Not at all	1	2	3	4	5	Completely	Notes



15. We can measure the **quality** of the impact our work makes.

Not at all	1	2	3	4	5	Completely	Notes

VII. A Track Record of Success (or at least the right leadership to make that happen)

16. We can show how our work has already made a positive difference.

Not at all	1	2	3	4	5	Completely	Notes

OR

17. As a new organization, we can show the successful track record of our leadership and/or affiliates.

Not at all	1	2	3	4	5	Completely	Notes

VIII. A Strategic Plan of Some Kind

18. We know the specific outcomes we're aiming for in the next 1-3 years.

Not at all	1	2	3	4	5	Completely	Notes

19. We know how we will get there by meeting specific objectives, given our context and resources.

Not at all	1	2	3	4	5	Completely	Notes



2. Assess Your Preparedness with “Next Level” Pieces

Once you have covered the 8 Information Essentials, see how many of these “next level” pieces you can gather. The more of these you have, the more you will impress potential funders. They may ask for these items, or you may be able to attach them (as appropriate).

Item	Notes about Your Org’s Preparedness
Non-discrimination policy/DEIJ statement	
Board governance policies	
List of board, staff, client demographics	
Letters of support from partner organizations	
Internal operations/employee manual	
Grant publicity plan	
Recent publications/media coverage	
Action photos/videos	
Service area map	

3. Grant Team Role Assignments

Think about who at your organization can fill these grant team roles. Remember that one person can do more than one task, and more than one person can fill any given role. Consider staff, board members, and volunteers.

Role	Assigned to...
Grant team leader <ul style="list-style-type: none"> • Often initiates a proposal draft • Combines and edits all team member contributions • Represents a curious funder without inside knowledge • Emphasizes meaningful results or outcomes • Ensures proposals are complete and as likely as possible to succeed 	
Program specialist <ul style="list-style-type: none"> • Outlines the prioritized program • Reviews proposal drafts for accuracy 	
Community needs assessor <ul style="list-style-type: none"> • Establishes why the program or project is so crucial 	
Evaluator <ul style="list-style-type: none"> • Tracks and measures program's effectiveness 	
Success story collector <ul style="list-style-type: none"> • Gathers stories and testimonials of clients who benefit 	
Budgeter/Financial tracker <ul style="list-style-type: none"> • Ensures accurate financial documentation 	
Administrative assistant <ul style="list-style-type: none"> • Provides/manages legal, technical, clerical support 	
Funding researcher <ul style="list-style-type: none"> • Researches and/or prioritizes most likely funding opportunities 	

Relationship cultivator <ul style="list-style-type: none">• Initiates and maintains funder relationships	
Strategic supporter: CEO/Board member <ul style="list-style-type: none">• Provides resources and inspiration to facilitate grant success	

4. The 5 Key Elements of Your Grant Proposal Narrative (FIRST)

PROGRAM/PROJECT: _____

1. Facts & Figures

Who are your clients, in terms of their relevant demographics and location?	A. B. C.
What are the relevant issues/problems they're dealing with?	A. B. C.
What are some current trends that make those issues so pressing?	A. B. C.

2. Importance

So What? Who Cares?



3. Results

What's In It for Us as a community?

4. Solution

Including Why You Chose It

5. Track Record (with Testimonials)



Generic Proposal Narrative Template

1. About Your Organization

Mission

The official one (usually 1-2 sentences), and a longer version that elaborates on it for another paragraph or two (to use if an application's space permits). If your organization also has a "vision statement" this would be a great place to include it.

History and **Track Record** of Accomplishments

Brief history of your organization, including its compelling origin and significant accomplishments, especially anything relevant to the project/program you are proposing.

Your Organization's Special Capacity or Skills

What sets your entire organization apart from others in your field?

Overview of Your Organization's Leadership and Infrastructure

Showcase your board and leadership team, and how they work within a strong organizational structure.

2. The Need

Facts & Figures about Your Community

Include any background info the funder needs to know to understand your work's historical context.

Importance of the issue

Emphasize what is at stake with (or without) your work being done.



3. Project Plan (**Results** and **Solution**)

Overall Goals (long-term)

A broad overview of what your program is trying to ultimately achieve.

Specific Objectives (short-term) Tied to Specific Outcomes

SMART objectives that are Specific, Measurable, Attainable, Realistic, and Time-bound. Essentially, these objectives need to be tied to particular expected outcomes (**Results**) in a defined grant period.

Activities You Will Perform to Meet the Objective

The nitty-gritty details of what the **Solution** will look like on the ground.

How You Arrived at This **Solution**

Explain why you chose this particular path over others, including any major processes that have evolved over time. How can you show that your program design is evidence-based, efficient, competitive, and up-to-date in your field?

Dissemination or Replication Plans

Explain any plans to share your successes with others in the field.

4. Evaluation Criteria

How and When the **Results** (Outcomes) of Each Objective Will Be Measured

Use both numbers AND narrative here that refer to success indicators, benchmarks, and milestones. Results are often measured halfway in and/or at the end of the funding period.

Who Will Measure Your **Results**

This could be an internal or external evaluator or team.



5. Client Stories

Representative Stories/Case Studies/Quotes (**Testimonials**)

Stories of how your clients have benefited: the results they have seen and the importance to them of those changes. These are even better if you include the client's own words and/or action photos.

Their Involvement in the Project's Design and Implementation

Examples: board service, volunteering, or program evaluation.

6. Staff/Volunteers/Collaborators

Share who is involved in implementing your program and show their capacity to address the need. Please include:

- Staff and volunteers and their titles/roles
- Key collaborators or partners, each with their unique contributions

7. Financial Plan/Budget [see also: Part III below]

Resources Currently Available from Other Sources (funds and in-kind community support)

Money you have in hand (or contracted), as well as non-monetary support (e.g., donated goods or services, event space, etc.).

Funds Needed and How They Will be Spent

How much money will you request, and what will it pay for?

Plans for Future Sustainability of the Program

Plans for continued raising of funds and community support from a diversity of sources: describe which strategies you will use, including any staff, board or volunteer involvement. If the grant you are requesting will contribute to our organization's future financial sustainability, say so!

8. Conclusion

One- or two-paragraph summary of the highlights: the need you are addressing, the proposed solution and your ability to implement it, and the request you are making.



Spot the Weaknesses

Can you identify the problems in this piece?

Our organization started up a few years ago because we wanted to improve the dismal quality of life and alleviate economic inequality for other women in our community. These problems do not actually affect our lives, but we wanted to appear charitable.

We propose the “Get A Life Project,” which will have a tiny effect on housing conditions for low-income women and will probably do nothing to change their economic status. We don’t have an innovative bone in our bodies, so we’re just doing the same old project that we’ve always done. Actually, there’s no urgency to the project, and it’s not part of any larger plan. In fact, we think there are already many organizations doing this work in our town.

We think that our Get A Life Project will provide much-needed assistance. Although no low-income women have asked us to help them, or have joined our organization, we think the project is a great idea. It’s not clear how we will do this work, but we are sure that we’ll come up with something. We will have to figure out how to serve people in unfamiliar languages, but we don’t think you want to know any details of how we actually will implement the project, and we definitely will not be evaluating it.

Our project does not address any of your Foundation’s priority areas, but we believe you will make an exception for us because of our good intentions. We will have to indefinitely rely on your foundation to sustain our work. We’re pretty desperate so if you don’t fund us we will have to close our doors.



Top 12 Writing & Editing Techniques to Use

1) FOCUS ON CLARITY

You know all about your programs, but your readers don't. Explain everything! Also, avoid vagueness by using specific data and examples.

2) ENGAGE BOTH THE HEART & HEAD

Your reader will remember how you make her/him *feel* more than anything else you say or do. Even we left-brained people need an emotional clue.

3) TELL STORIES

Abstract concepts and stats are less compelling than real people's stories. They can crystallize the ideas you are trying to communicate.

- Talk about how people have benefited: results they've gotten, importance to them
- Choose memorable characters who go through a transformation and solve their problem through wise use of your services

4) USE QUOTES WELL

- Capture the essence of the story with short quotes from your clients. Strive to create a human, emotional connection
- Ask: "How did you benefit from the experience? What changes did you see happen? And why is that important to you? What other changes did it lead to?"

5) TAKE CUES FROM THE FUNDER

- Remember to answer all of the funder's questions with detailed answers
- Use the funder's language
- Use headings and sub-headings with chunks accessible at a glance

6) AVOID YOUR ORGANIZATION'S JARGON AND UNEXPLAINED ACRONYMS

- Would your readers use the term themselves?
- Does the term mean the same thing to them as it does to you?
- If you must use technical terms or acronyms, explain them the first time



7) SHOW, DON'T JUST TELL

Ask yourself: How would you illustrate the concept in a photo or video?

Show **HOW** your solution benefits folks (car dealers let you test drive; realtors **SHOW** houses)

The more ways we get to experience something, the better we own it. The idea: prompt their own experiences that will lead to their support of your conclusions.

8) FAVOR VERBS IN THE ACTIVE VOICE

Passive voice: forgets about the subject (who or what is performing the action) and only focuses on the object (the recipient of the action)

Active voice: shows what's happening and **WHO** or **WHAT** is doing the action

9) USE VIVID VERBS

- Try to create a picture in the reader's mind
- Replace adverbs with stronger verbs
- Eliminate weak forms of the verb "to be"

Original: The emergency food pantry is helpful to individuals and families in times of crisis.

Suggested revision: The emergency food pantry **immediately delivers** critical support to hundreds of individuals and families in times of crisis.

10) MAKE IT SKIMMABLE

Remember: Your reader is skimming many of these per day. Be easy on them and they will appreciate it! Use:

- White space
- Legible font
- Numbering
- Bullets

11. LESS IS MORE

"I didn't have time to write a short letter, so I wrote a long one instead." —Mark Twain
Sentences should strive to be 14-20 words max.

12. PROOFREAD

- Check your document for grammar, punctuation, spelling, and other slip-ups.
- Read it out loud to catch things that don't sound right or that you overlooked.



FAQs about Grant Proposals

Question

As a rule of thumb, how detailed should one be (without being too wordy) about each topic? Should I keep the proposal focused on just what purpose I would be using the money, and not the rest of the program ideas?

Answer

This is going to depend on the questions asked in the RFP, as well as the page length you are allowed. Make sure you give an overview of the entire project, but most of your detail will be on how you will use the money you are requesting. You want to give enough detail that will answer the funder's questions, but you don't need to go into minutia – if they want it they will ask. Remember, you want to sound like you know what you're doing, but you don't need to share all details of your business plan upfront. Your reader probably doesn't need to know it all to get a picture of what you're up to. This is **especially** true in a Letter of Intent (usually 1-3 pages).

Question

Do I need to spell out exactly who will do what? How in-depth should I get?

Answer

Feel free to include the number of employees, volunteers and collaborators and give a general sense of what they will be doing and how they will work together. But you generally don't need to give a complete flow-chart. Again, this will depend on the RFP requirements. For example, sometimes the funder will request full resumes of everyone involved or specific job descriptions. Often, though, this is not the case.

Question

I want to expand on the evaluation component of my proposal. Should I pair the specific proposal's objectives with the relevant evaluation points, and leave out the other evaluation points? Or, should I write about all of the objectives and evaluation points of my entire program, but specify which will be covered in the money I am seeking?

Answer

Definitely talk about any and all evaluation points you are planning. Objectives that will not be covered by the money you are seeking should be mentioned in your program overview, but usually not in detail.



Question

In the FIRST acronym, I often get confused between the "results" of my work and the "solution" I'm advocating. Can you clarify?

Answer

"Results" are things you envision as the outcomes of your work. What do you plan to achieve at the end of the day? What changes or community benefits will be the end results? What will success look like? For example, your organization may seek to fight environmental injustices in your community by first educating folks. This education is a short-term result, and the long-term result is that this education leads to measurable changes in your local area.

The "solution" is the specific way you are working to achieve these results (i.e., solve the problem you are addressing). What program or project are you advocating? Your plan should be specific enough that it can be measured and tied to specific outcomes. For example, the environmental justice group cited above may be holding a series of educational events. How many people will attend, and who will they be? How will the events be educational? Will the event series be a component of a larger mobilization strategy? How will you know that your solution (i.e., the educational events) has brought about the intended short-term and long-term results?



Glossary of Grant Writing Terms

Boiler-Plate: Pre-written blocks of generic material which, with slight modification, can be used in a variety of proposals and templates (organization description, community profile, staff and board qualifications, etc.)

Bricks and Mortar: An informal term for capital funds generally used for building renovation or construction.

Case Statement: A summation of all the reasons (including accomplishments, current activities and future plans) that would encourage support (economic, personal and public) for the organization

Challenge Grant: A grant that must be matched with money raised by the recipient.

Community Foundation: A 501 (c) (3) organization that makes grants for charitable purposes in a specific community, region or affinity. The funds available to a community foundation are usually derived from many donors and held in an endowment that is independently administered. Income earned by the endowment is then used to make grants. Although a community foundation may be classified by the IRS as a private foundation, most are classified as public charities and are thus eligible for maximum tax-deductible contributions from the general public.

Company-Sponsored Foundation: (Also referred to as a corporate foundation): A private foundation whose assets are derived primarily from the contributions of a for-profit business. While a company-sponsored foundation may maintain close ties with its parent company, it is an independent organization with its own endowment and as such is subject to the same rules and regulations as other private foundations.

Deadline: The final date for proposal submission or reports, either online or to the post office (if the date has to be established by postmark, send your proposal or report *Certified* and get a dated receipt or use a service that will give you a receipt!). In the process of seeking grants, deadlines are almost always set in concrete; as always, read the RFP carefully and fully. Concerning reports, there may be room for extension, but discuss that with the funder before the deadline.

Demonstration Grant: A grant made to establish an innovative project or program which, if successful, will serve as a model and may be duplicated by others.

Family Foundation: An independent private foundation whose funds are derived from members of a single family. Family members often serve as officers or board members of family foundations and have a significant role in their grantmaking decisions

Form 990: The information return that public charities file with the Internal Revenue Service (IRS); required for all nonprofit organizations that have been recognized by the IRS



as a 501 (c) (3) tax exempt and have annual income of \$25,000 or more. The information includes financial information, the names of the officers and highest paid employees and their salaries. Some states require that this form be filed with the Attorney General or other state agency. These forms as filed are available on the Internet at <http://www.guidestar.org>. The 990 is a public document and must be shared with the public when requested, along with other documents.

Form 990-PF: The public record information returns that all private foundations are required by law to submit annually to the Internal Revenue Service (IRS). This form provides financial information, names of officers, trustees or directors, and a list of grant recipients and amounts contributed during the year. These forms as filed are available on the Internet at: <http://www.guidestar.org>.

LOI: Acronym for Letter of Intent, Letter of Inquiry, or Letter of Interest. These are introductory letters (usually 1-3 pages) often requested by foundations before inviting a full proposal. The Request for Proposal (RFP) will let you know if and LOI is required.

Prospecting: The term used for researching potential grants. This includes reviewing databases of funders, IRS forms, funder websites, etc.



Part II:

Introduction to Funder Prospect Research



Steps to Prepare for Prospect Research

STEP 1: Identify a high-priority program or project you are fundraising for, and its approximate budget size. You should have already done this earlier in this course series.

Examples might be:

- Specific program/project continuation or expansion
- Collaborative project with partners
- New program seed funding (only some funders offer this)
- General operating support (only some funders offer this)
- Capacity-building (generally, only if you have a pre-existing relationship with the funder)

STEP 2: Brainstorm keywords and phrases for each priority program from different points of view. The work you have already done to describe your chosen project should inform this step. Think about:

- Geographic location (country, region, state, county, metro area, city)
- Population(s) served
- Needs addressed
- Type of solution

STEP 3: List your current and recent funders and the corresponding grant amounts. You will use this list to try to find similar funders. Remember that you get to define “recent”; sometimes lapsed funders from several years ago need to be revisited!

STEP 4: List similar organizations/collaborators. You may have already started thinking about this when you were listing your collaborators in the Generic Grant Proposal Template in Grant Writing & Management 201. What are some other organizations in your city, county, or state that do work somewhat similar to yours? You will want to research their funders, as they may also be interested in supporting your work.

STEP 5: List any funders you need to avoid for any reason. This may be due to issues such as conflicts of interest, concerns about government funding, etc.



Your High Priority Program:

Step 1	Budget Size	
Step 2	Geographic Location	
	Population(s) Served	
	Needs Addressed	
	Type of Solution	
Step 3	Current or Recent Funders (dollar amounts in parentheses)	
Step 4	Collaborators/Similar Orgs	
Step 5	Funders to Avoid	



Sources for Funder Prospect Research

There are so many ways to find out about prospective funders! While this list is not comprehensive, it will definitely give you many options as you get started.

Free

1. [Foundation Directory Online](#)

Best-known among the options, it earns my recommendation for a place to start. It's available for free at many public and university libraries (check the list of Funder Information Network locations [here](#)). To get access on your own computer at your office, there is a subscription fee.

2. [Philanthropy News Digest](#)

Check the RFPs tab for your issue area, and sign up for their email alerts.

3. [Instrumentl.com](#)

A newer player on the scene, this database caters to nonprofits and academic researchers. There is an initial free trial.

4. [NOZASearch](#)

Search foundations' giving histories for free (for corporate funders there is a fee). The entire database is free at some libraries.

5. [Grants.gov](#)

This large website lists all RFPs issued by the U.S. federal government.

6. [OpenGrants](#)

This new and growing database offers both free and paid options.

7. **Your state congressperson/senator or county or city officials**

They often will list government grant opportunities.

8. **Large or small companies in your local area**

You probably already know these names, but don't forget your organization's own vendors. Look for both monetary and in-kind grants or event sponsorships.

9. **Universities**

If you are connected to a university, see what grant opportunities the university library can connect you to. There are many databases specifically for academics/researchers.

10. **Civic organizations in your local area**

These groups often fund small local projects.



11. Professional associations interested in your project's topic

Again, you may be eligible for monetary or in-kind grants.

12. Grantmaker networks according to interest area (e.g., health, environment, education)

While the networks themselves don't offer grants, their members generally do. Examples include:

- [Funders for LGBT Issues](#)
- [Women's Funding Network](#)
- [The Funders' Network](#) (focus on creating communities and regions that are sustainable, prosperous and just for all people)
- [Health & Environment Funders Network](#)
- [Environmental Grantmakers Association](#)
- Grantmakers' networks in YOUR state or region

13. Search engines (Google, etc.)

While this is not my first choice, you may be able to find some good prospects.

Paid

1. [Foundation Directory Online](#)

Although it's available for free at many public and university libraries, you may need to access it on your own computer at your office – and that requires a paid subscription.

2. [Instrumentl.com](#)

A new player on the scene, this database caters to nonprofits and academic researchers. After the initial free trial, there is a subscription fee.

3. [GrantStation.com](#)

This website often offers special discounts. The company also offers a weekly free newsletter.

4. [Foundation Search](#)

This database lists grant opportunities from foundations in the U.S. and Canada.

5. [California GrantWatch:](#)

This site has different subscription options.



Funder Conversation Worksheet

As the grantseeker, you will want to have an initial conversation with your intended “grantmaker” BEFORE you submit an LOI (if at all possible). During this brief conversation, you will try to find out if it makes sense to submit an LOI or any other information.

PART A

Using your completed FIRST table (from webinar #1), write out a 1-page list of talking points that your research tells you would be of most interest to the funder. Remember to address their priorities and use their language. It could look like this:

Facts & **F**igures:

Importance of the issue (So what? Why they should care?):

Results you expect:

Solution you are using and why you chose it:

Track record:

Funder’s special interests and emphasis:



PART B

- What is the total budget you are trying to fund? \$_____
- If the funder asks, how much will you be requesting? \$_____

PART C – Sample Script for the Beginning of the Call

[Customize this sample script to fit your personality and refer to any pre-existing relationship your organization may have with the funder. Also, consider the type of funder you're about to speak with (large, small, private foundation, corporate, government, etc.) and try to accommodate their organizational culture.]

Hello! My name is _____ [your name], and I'm with _____ [org's name]. May I speak with _____ [name of Program Officer]?

I'd like to introduce you to the work of _____ [org's name], serving _____ [location], and ask a few questions about your upcoming deadline (or RFP or guidelines). Do you have a few minutes right now?

Great! We at _____ [org's name] are interested in your _____ funding priority, as we see a good match with our work because _____

[Then discuss your FIRST items in your own words, emphasizing what you believe is of special interest to them, using whatever sequence makes sense to you.]



PART D

Prepare 1 or 2 questions you can ask the funder, based on your research. Refrain from asking questions that they answer on their website. Listen carefully to the funder's answers and take notes! Below are a few sample questions.

Questions	Notes
SAMPLE: If you are unclear about anything in the guidelines or application, clarify!	
SAMPLE: Do they prefer to give program-specific grants or general operating support?	
SAMPLE: Will reviewers need technical details or are they generalists?	
SAMPLE: What are the most common mistakes they see in proposals sent to them?	
SAMPLE: What grant amount is appropriate to ask for?	



PART E – Sample Script for the End of the Call

[If appropriate:]

“It sounds like submitting an LOI (or proposal) would be a good next step. What do you think?”

[If you are unclear about how to do so, just ask. Alternatively, they may be interested in other types of follow-up; explore those options. For example, they might want to receive your newsletter or connect with you on social media to keep in touch.]

“Thank you very much for your time and advice today. I really appreciate it and will be in touch again very soon.”

PART F – Post-Call Notes

Keep notes about the funder’s questions, advice, information shared, and tone of the discussion:

What do you feel you did very well?

What can be improved next time?

How did the conversation make you *feel*?



A few pointers to keep in mind for your side of the conversation:

1. Be professional, show respect, and project confidence. Most program officers are friendly, community-oriented, collaborative people and want to help (hey, that's why they're there!). They also want to save themselves from wading through oceans of inappropriate applications. If you show that you are sincerely interested in an effective partnership of mutual respect, they will usually respond in kind and be honest about their foundation's interest in your work at this time.
2. Make sure that your information is accurate and consistent. Don't let doubt get in the way of establishing your credibility and good reputation. If you don't know the answer to a detailed grantmaker question, say so and make sure to get back with them promptly with the information.
3. Listen carefully to the grantmaker's questions to you. Questions indicate their areas of interest or concern. Are they demonstrating a sincere curiosity about the details of your work? What do they want to know MORE about that you should be sure to illustrate in your LOI? They also may tell you information that is about to go public or is actually not widely available. They may even extend a deadline for you in an unusual circumstance. Be prepared to take plenty of notes!
4. Also listen for their tone of voice. Are they communicating friendliness, openness, helpfulness? Or are they dismissive and trying to end the call? This will tell you a lot about not only their interest level in your work, but also what it would be like to work with them over the long term.
5. Follow up as soon as you can with any requested information or just a thank-you note.



“Grantmaker” Roleplay Worksheet (to give to a colleague helping you out)

YOUR ROLE

Thank you for playing the role of “Grantmaker.” In that capacity, you:

- Have significant background and concern about the issue at hand, BUT may be unfamiliar with the organization's particular slant or niche
- Want your grant to be a good investment with a good "return"
- Are time-pressed, and want direct and succinct answers
- Want to be inspired by the vision laid out by the Grantseeker

You are representing _____ [name of Grantmaker] with these specific characteristics:

-

NOTES

Please jot down anything that stood out for you in your conversation with the Grantseeker. Feel free to also add any comments about things you want to know more about.

These are the topics the Grantseeker was trying to cover:

- ***Facts & Figures*** of the problem:
- ***Importance*** of the issue: (why you should care):



- **Results** they expect:

- **Solution** they are implementing and why they chose it:

- **Track record**:

What was the budget for the proposed program and the amount of money they are requesting?

Did they end the call with an action step to take?

How did you *feel* after the conversation?

Any specific suggestions for improvement?



Part III:

Numbers with Purpose: Financials for Stronger Grant Proposals



Check out [this handout](#) from the Rose Foundation! It reiterates some of what we covered in the webinar, and includes a combined financial statement/budget in one concise form!

Generic Budget/Financials Template

YOUR ORGANIZATION'S NAME:

Current year budget dates (month/year to month/year):

Last completed fiscal year (month/year to month/year):

EXPENSES

ITEM	BUDGET	THIS REQUEST	NOTES	Last year's actuals
DIRECT EXPENSES				
<i>Personnel/Staff [with FTE]</i>				
Title				
Title				
Benefits and taxes [__%]				
<i>Non-Personnel</i>				
Equipment				
Supplies				
Consulting services				
Mileage				
Printing/copying				
Advertising/marketing				
Travel				
Staff training				
Insurance				
Evaluation				
Other				
Other				
Other				



Miscellaneous				
INDIRECT EXPENSES (should be 10-15% of the total]				
Rent/utilities				
Website				
Other				
Other				
TOTAL EXPENSES				
REVENUE				
Funding Source (earned, contributed)	AMOUNT/VALUE	STATUS/LIKELIHOOD (awarded, committed, pending, to be requested)	Last year's actuals	
Carryover				
Individual donations				
Foundations/Corporations				
Government				
Memberships				
Special events				
Other				
Other				
In-Kind				
TOTAL REVENUE				
REVENUE MINUS EXPENSES				

Another budget template from [Philanthropy Massachusetts](#)



Here is a sample description of an extensive government match requirement:

<https://www2.ed.gov/programs/gearup/gupmatchinjune03.pdf>

A few budget reminders

- Funders often read budget first, and then the narrative to make sure they are realistic and consistent
- Explain anything unusual in the budget
- The “Misc.” line item should be minimal
- Estimate 12-25% for fringe benefits
- Request amount: should be aligned with the funder’s average grant size; must be significant to the project but not the majority of funds needed (average: 1/3-1/2)
- Watch out for line items that a funder will NOT fund
- Funders often want indirect expenses to be 10-15% of the total budget

BONUS: Mock Review Checklist

Congrats! You have created a solid draft of your proposal narrative and budget.

You’re now ready to get some feedback from others at your organization by doing a Mock Review. Before you hand off your draft to others, YOU can also offer this “feedback” if you can imagine yourself as a Program Officer who is new to the proposal.

Your Mock Review will of 2 parts: narrative and budget reviews. You will be reviewing both components to make sure they are consistent, contain the right information, and are expressed well.

Find the [Proposal Mock Review Checklist here](#).

