

LESSON 5

INTANGIBLES: THINGS THEY NEVER TELL YOU (ABOUT PROPOSAL WRITING)

OPENING REMARKS

I have a friend who recently started writing grant proposals for her smallish nonprofit. Although she is an excellent writer—and a whiz at all the things we cover in the rest of this book—there is one recurring problem she faces that would drive her to drink if she weren't a teetotaler. She can never seem to get people to give her the material she needs to write the proposal! She has to beg—sometimes right up to the deadline—for demographic, financial, or program information. She loves writing grant proposals, but she hates feeling like a stalker. —EK

LEADING QUESTIONS

What's Up with Intangibles?

Over the years, many people have asked us what it takes to be a grant writer and what secrets successful grant writers seem to know and not-so-successful ones... don't. Some who ask tell us they are thinking

of switching careers or changing their job descriptions within their current organizations, like the friend in the Opening Remarks. And others are currently writing grant proposals but feel they're missing something in all the "how to write a winning proposal" road maps. So for this lesson we interviewed funders and people who write (successful) proposals themselves or who hire and supervise proposal writers. The advice that follows—perhaps obvious when you think about it, but usually not part of a "grantsmanship" discussion—is gleaned from their responses and from our own hard-earned experience.

Who Actually Writes the Grant Proposal?

In Lesson 1 we described all the different types and sizes of government agencies and nonprofit organizations that could be seeking grants. Even within those different categories, organizations differ widely in the ways they handle grant proposals, usually but not always based on resources, and often changing over time. The person who writes proposals may be a founder of the organization, an executive director, an assistant commissioner, a teacher, a scientist, a professor, a program director or program staff member, a board member, a development director or development associate, a designated grant writer on staff, a consultant, or a volunteer. Or—you name it—someone in almost any other job title you can think of can end up doing the writing if the circumstances require it.

Some organizations and agencies use a team approach to writing grant proposals, pulling together program and financial leadership and staff to work with the writer, who may (or may not) serve as the team leader. Other organizations use this "all hands on deck" approach only for major government or national foundation proposals.

But whoever is responsible for writing a grant proposal (and submitting it on time and in excellent shape) needs to be aware of the "intangibles"—the not-so-obvious secrets of success—we cover in this lesson. From our own experience and what we've heard during interviews, the job descriptions don't come close to the reality of the position. This really is where the intangibles come in.

always have to decide what's reasonable and make the case for each item in your proposal.

Include in-kind contributions. Unless legislation or regulations require it, you will rarely see any suggestion that your grant proposal should show your organization's commitment to the project (e.g., by contributing in-kind personnel and resources to supplement the grant funds). But you may be providing such resources anyway (space for the project, volunteers, management oversight, bookkeeping). Doing this, and saying so in the proposal, demonstrates your commitment to the project.

Show you're diversifying funding. Some grantmakers are specific about wanting to know what your other sources of funding are and how you will sustain the program after the grant runs out, but many others won't ask. If space allows, tell them about other grants you're seeking or have received for the program. Tell them about board contributions to the organization and the board's other fundraising initiatives. And if you are engaged in entrepreneurial initiatives to raise money for the program or for the organization as a whole (see Lesson 18), by all means tell them about that.

Enhance the organization's reputation. Nowhere does any guideline say that an organization's reputation can help or hurt your chances to get a grant (although it is often implied in a question on organization capacity; see Lesson 14). If your programs are known, if your staff members are recognized experts in their field, if you generate model programs that others replicate—all of these things speak to your organization's capability to manage a grant. So publicize the good things you're doing and awards you receive, and—if there's room—talk about them (and the publicity) in your proposals. Send out cheerful newsletters describing your organization and programs, and include them in a proposal package (if it's appropriate; check the guidelines or ask the funder about this). Speak, and encourage staff to speak, at conferences; host conferences; become known as experts in the field.

Consider the reader. Nowhere does any application tell you to write in a clear, reader-friendly manner. Nowhere in any instructions

managers and staff to be creative in pursuing alternative means of funding beyond grants (see Lesson 18). In other words, you need to be a planner, considering how each grant and each program serves the agency's mission and fits into its other operations.

Of course you can't make these decisions alone, so, unless you're the mayor or commissioner or executive director (and probably even if you are), you should be prepared to advocate for the appropriate grants internally and maybe externally, and to explain why others are not appropriate. In some organizations this just may mean holding out for a grant for general operating funds from a particular funder (remembering that general operating funds are true gold for an organization) instead of one for a program that staff members are pleading for from that same funder. It may mean you are constantly looking at the long-term strategic plan or arguing for a new planning process that identifies funding priorities along with service priorities—and lays out conditions for closing a program if necessary. And again, you need to know when you *must* enlist the proper authorities in these efforts.

IN CLOSING

We hope this lesson has convinced you that grant proposals aren't lottery tickets. And the people who develop and write proposals aren't just good writers who can follow directions. Far from it! You don't win grants (for the most part) because it just happens to be your lucky day. There are no right answers on a grant application, but there are plenty of wrong ones. Put yourself in the shoes of the people reading your proposals—the people representing the interests of the grantmakers—and think about what would make sense to them.

As you read the following chapters and as you develop your own proposals, keep these important (but unmentioned) intangibles in mind.

things they ask about in interviews—but what does it mean? For one thing, you probably are the person in an organization who researches or oversees research on grant opportunities and keeps a calendar of all upcoming proposals. You (and your boss) will be very upset if a planned proposal for a critical program slips past a deadline. You also may be the person who keeps track of grants received and reports that are due to the funders. And while you're in the process of developing and writing a grant proposal, you will have endless deadlines for other proposals, meetings, research, telephone calls, and quite a few other things to keep straight. Being scattered is not an option for a grant writer!

Be technologically savvy. On the surface, it seems that word processing, and maybe a spreadsheet, are the only computer skills you need to use if you write proposals. But many of the people we interviewed mentioned the importance of technology. "Top grant writers these days have to be 'digital natives' rather than 'digital immigrants,'" one said. Another added the importance of doing graphics. In small and medium-size organizations, grant writers may wear many hats: you may handle the website, the Facebook page, the Twitter account, the newsletter, the annual report. Even if your only job is writing proposals, you will have to submit proposals online (see Lesson 3), conduct comprehensive Internet searches for funding sources and research materials for your proposals, and create charts and graphs for your proposals (when they are permitted).

Focus on the big picture. Remember: Whatever your job title, *you are one of the few people in an organization who must look beyond a specific program to consider the good of the entire organization.* There's a world of grants you *could* be seeking (and program staff will be imploring you to find more), but it's not only constraints on your time that should limit which ones you pursue. We've talked elsewhere about mission creep. You have to look at each grant opportunity in light of the organization's mission, its long-term needs, and its sustainability, not only in light of the immediate need to get money to keep a program alive. You also must encourage and help

- Brainstorm how the proposed program will address that problem (30 to 40 minutes).
- Are there other programs similar to ours in the neighborhood? The community? The city? If so, how are they working and how does our program fit?
- What goals and objectives do we hope to achieve with the program?
- Do any obstacles immediately come to mind? How do we address them?
- How will we evaluate the program's success?
- Will we be able to sustain this program after the grant money runs out? How?
- Do we have the organizational capacity to efficiently implement the program? What do we need?
- Set a timeline and the assignment of responsibilities for follow-up (5 to 10 minutes).

Take attendance. Some funders like to see who is involved in the preparation of the grant proposal, especially if the grant is large or targeted to a collaborative effort. It is a good idea to make sure all participants fill out a sign-in sheet for each meeting in case you decide to include names and titles of participants as an attachment to the proposal. We talk a lot about “buy-in” throughout this book; attendance sheets can show commitment to the project in ways that support letters may not.

Intangibles That Don't Appear in the Application Package and Why They Are Left Out—Could It Be That They Seem Too Obvious?

Sure, the application may explain the program guidelines, legislation, other relevant information and research, selection criteria, eligibility requirements, deadline, page limit, font and margin size, and many other important and helpful facts until you're sick of seeing

What's the Best Way to Get Off on the Right Foot?

Ask for files. Before you do anything else, locate anything that's ever been written about the program for which you'll be writing—past proposals if there are any, proposals for related programs, letters, memos, and so forth. This is especially true if you are new to the organization and/or unfamiliar with the program; otherwise ransack your own files to find materials you can use. Review these carefully before you proceed so you know what questions you need to ask.

Have a kickoff meeting. It is our experience that for any proposal that is significant to the organization in terms of money or prestige, you must have what we think of as a kickoff meeting, which may get you much of the information you need and resolve some of the issues we mentioned in the last section.

Normally, you, the proposal writer, should be chairing the meeting. The kickoff meeting should be carefully planned to elicit this information and engage the participants in the proposal process while respecting the limited time available to most participants. As the facilitator of the meeting, everyone will be looking to you for answers. Don't be caught off guard: Plan this meeting within an inch of your life.

Have an agenda. Remember that many people are meeting-phobic (we've made up the name for this phobia, but we're certain it exists). The only thing that can reduce the fear that the meeting will never end (or will be a waste of time) is a very specific agenda, which you should create and distribute in advance. You may want to specify how much time will be spent on each agenda item. Here's a sample of items for inclusion:

- Provide a description of the proposal guidelines and requirements (no more than 10 minutes).
- Discuss the problem the grant-funded program will address (10 minutes).

Writing a Grant Proposal Is Challenging Enough—How Can I Make Things a Little Easier on Myself?

Writing a proposal is never easy—and it shouldn't be, given the amount of money at stake—but we've come up with a few hints that might help you out.

Beware of internal politics! Politics—internal and otherwise—seem to play a part in most jobs, including the position of grant writer. Here are questions to ask at the beginning of the proposal process to protect yourself from unexpected political landmines.

- Is everyone—from the organization's leadership to the program and budget staff to the people who will participate in the proposed grant-funded program—100 percent on board? Does someone in authority think it's a waste of time? Do some staff members think the proposal should be for *their* program rather than the planned program? If there's significant disagreement on any issues, all doubts had better be hashed out and resolved—or the project should be scrapped.
- Is it clear that you are the one who will write the proposal? If someone else claims the honor, have a friendly discussion, draw straws, or get the boss involved.
- Has it been decided which staff members in the organization will develop the program—and who will take the lead? (If not, let whoever's in charge know it needs to be resolved *now*.)
- Who will be responsible for providing you with all the material you need to write a winning proposal? What staff input is needed, and what managers will follow up? If this isn't spelled out, good luck in getting the proposal written.
- Does everyone involved know the due dates and deadlines so the grant application can be completed on time? (Put it in writing.)

You may wonder why these questions appear in a section on internal politics, or it may be completely obvious to those proposal

writers who have ever had to beg for statistics from program staff or who found out close to the deadline that the executive director didn't really want the program. We don't mean to be cynical—but we are. We don't want your efforts to be undermined by confusion, hostility, competition, or anything else that has nothing to do with the actual grant proposal.

(Try to) be a friendly, smiling "people person"—even when people don't do what they promised. As we've mentioned before—but it's worth reminding you again—a big part of the grant writer's job is enlisting support from others in the organization. You need buy-in and active participation, not to mention lots of information, from program managers and staff. As the executive director of a large nonprofit told us, "The most important strategy for a successful grant writer is to get inside the program staff's heads."

Even if they understand what you need and when you need it, *you must respect the fact that staff have their own, very necessary, jobs to do*, leaving them limited time to help you even when they are excited about the proposal and have promised to do their share. Sometimes you do have to be a bit of a stalker (we're trying to think of a friendlier term) to get the information you need from the people who have it. You may need to schedule and reschedule meetings to accommodate staff; you may need to make multiple phone calls for information when staff don't have time to call for themselves; you may need to offer to go through files and records yourself to find crucial information that you really wish the program staff would give you. And you should (somehow) do all this with a smile on your face! It's not surprising that some of our respondents said that being flexible is a key to success. One suggested, "You'd better leave excess baggage at home...and you'd better not be overly sensitive."

Finally, you need to know when (and whom) to call after you've tried everything else and still don't have everything you need to write an excellent proposal.

Even if such organizations genuinely believed they could offer these services effectively—and even if by some remote chance they won a grant—this fundraising approach could endanger their organization's mission by moving into areas that are outside its experience and fundamental concern. But what is more likely to happen is that the grantmaker will see this as a ploy to get money, not an honest attempt to solve a compelling problem. The need for support may be very, very real and very, very compelling. And the grantmaker may understand this and sympathize. But an honest request for funding from sources that are appropriate is a far better approach than scatter-shot applications to anyone and everyone who offers grants.

Don't be greedy! Among the intangibles that "everybody (supposedly) knows," is that you shouldn't ask for excessive amounts of money. Nowhere does any application package or set of guidelines remind you not to be greedy. You will never see any indication that \$200,000 a year is too much to pay a grant-funded project director of a tiny community youth program, or that the executive director's entire salary or an expensive new color printer won't be paid out of a grant to treat substance abusers at a community clinic. And if you ask a funder how much is appropriate, you probably will be told it depends on the program, or the organization, or the skills of the executive director; you need to exercise some judgment, based on what you know or learn about the real costs.

But be fair and realistic about salaries (and other costs). The application guidelines also won't tell you to treat your employees fairly and pay a reasonable salary for the responsibilities they are entrusted with. Nowhere does an application indicate what type or caliber of staff should be hired for a particular program or how much they should be paid. Rarely will it tell you what proportion of a grant—if any—can be allocated for project supervision or for support services such as bookkeeping or a security guard. The application or guidelines won't tell you how to design your program or formulate your budget or your evaluation plan. As we discuss in Lesson 12, you

them. But it does not explain underlying assumptions about the entire grant process. You are expected to understand certain truths, which are different from tips and helpful hints. There are a few other things that people rarely discuss when they talk about grant proposals. These other intangibles may seem too obvious to mention—but ignoring them can hurt your proposal's and your organization's odds of winning a grant.

Know the grantmaker. First and foremost, as we've said often and will say again, before designing a program or writing a word, it is important to know as much about the grantmaker—whether it is a tiny family foundation or a huge federal government agency—as possible. It is just common sense. You are rarely asked to show explicitly how the proposal will serve both your organization's mission and that of the grantmaker, but this is one of those intangibles that underlies everything else you say in your proposal.

Know the field. Remember that although application packages do not generally say anything about “knowing the field,” often you must demonstrate exactly that—especially for larger grants. Your organization really needs to make sure that it is up to date not only about the kinds of programs that have been shown to work successfully but about local and state policies as well. The grant application must reflect this wisdom.

Be honest! Nowhere does the application warn you not to fib, embellish, or lay out unrealistic plans or outcomes—which you can be sure the reader of your proposal will recognize immediately.

This is a good time to mention again that you shouldn't seek a grant to solve a problem that you don't have or that is not a high priority for your organization. Too many not-for-profits are so desperate for money that they may try to get any funding that's available, even if it's not directly related to what they really want to do. A child care agency in dire need of money might apply for funds to provide homemaker services. An arts organization in serious financial trouble might apply for a grant to provide substance use intervention.

hiring decisions (although some give writing assignments), so we assume they recognize smarts some other way. One likely strategy that will help you to be one of those smart grant writers is to make sure you know what's going on politically and economically in your community, your town or city and state, and in the country. Even if it's subtle—a sentence here, a sentence there—winning grant proposals reflect the climate in which they are developed and written. You are not writing proposals in a vacuum. It is not acceptable to say, “Gee—I work so hard that I don’t get much of a chance to read newspapers or watch the news on TV or online.”

You also need to be up to date on research related to your organization’s mission. You should be aware of the trends and the current thinking. Just think—you’ll not only increase your chances of winning grants (and having your boss call you smart), you’ll also be a terrific conversationalist at parties!

But Wait, There’s More!

Some of the most important intangibles you will bring to this job involve your own personal skills and characteristics. You’ll probably be under a lot of pressure to get things done, so consider the following intangibles essential.

Don’t dawdle. Successful grant writers need concrete skills—obviously, you must write well—but also, as some executive directors have explained, you must do a clear, concise job “to pace,” or “to meet the deadlines,” even when many proposals are due in a short time frame. You usually don’t have the luxury of writing multiple drafts; you’re lucky if you have time to circulate a first draft and get responses before the proposal is due. So writing well is, of course, crucial to your success as a grant writer. But writing quickly is important too. And as one executive director warned, “You not only need to write fast, you’d better write meaty and not fluffy!”

Be organized. Most job descriptions for people who write grant proposals (and for most other jobs as well) call for “good organizational skills.” Executive directors have told us that it’s one of the

does it state that you should not include drawings or cartoons to make the case (although the funder may tell you not to send videos, or to limit illustrative materials like news articles to a certain number). It probably doesn't tell you to provide a table of contents (Lesson 14) to let the reader skip back and forth to be sure you've covered everything. And although a grant-application package may give precise instructions on the size of margins or font (also for the benefit of the reader), nowhere does the package say that one abbreviation or acronym after another strewn throughout the pages of a proposal only confuses reviewers.

Watch your language! Nobody ever tells you to watch your language. As we discuss in Lesson 6, it is very important to be aware of the way you describe your target population, partners, and everyone and everything else. Sometimes you may think that avoiding certain terms is just too "politically correct." But you never know. One of us was planning a capital campaign and developed an "adopt-a-room" initiative, only to learn that some parents of adopted children hate to see the term applied to anything else because they feel it cheapens the adoption process. If we had used the term in a proposal, we might have offended the very program officer we were trying to impress.

Build relationships with funders well before you apply for grants.

You will see this approach put forward by grantmakers throughout the roundtables, and executive directors give this advice as well. "Relationships matter," warned one of the executive directors we spoke to. "Putting business cards into the hands of grantmakers you meet at meetings or conferences is silly. People who give grants need to trust your organization, not stare at your business card." Inviting funders to visit your programs or sending news articles or brief newsletters is a much better way to build the kind of relationships that can lead to trust and, eventually, to grant funds.

Keep up with the news. Every person we interviewed for this book insisted that the best grant writers are "just" smart and savvy. Executive directors and development directors certainly don't give IQ tests or look at applicants' college grades when they make their