

# Grant Writer's Toolbox

## Information and Documents

### DUNS Number

This is a Dunn and Bradstreet number. Every organization soliciting federal funds must have a DUNS. It may take a couple days to get it.

### CCR & TPIN Registrations

If you are working on federal grants, you'll need to register with the Central Contractor Registry, (CCR). For this you need a Trading Partner Identification Number (TPIN). To get the TPIN, you need a DUNS (above).

### Scanned Signatures

Since you may be dealing with electronic versions of documents, created and saved as a word-processing document, or .PDF, it is a good idea to have scanned signatures that can be pasted into a document. This is quicker than printing out a document, chasing down the person to sign it, and then re-scanning the document with the signature on it.

### Certificate of Good Standing

This is an official certificate issued by your Secretary of State that your organization is legitimate and that you've filed your corporate annual reports. For our state it requires an application via the web, a fee of \$20.00 (which cannot be paid by a credit card), and a wait of 3-5 days.

### Certificate of Good Standing by your Lawyer

Last year when applying for TARP funding, it turns out that we were required to get a written certification by our law firm that our corporate books were in order, that we weren't facing bankruptcy, etc. This cost us \$300. It was the only time I've run into this requirement, but it was almost a show-stopper given the time required.

## Hardware

### Corporate Seal (for a non-profit)

This *is* actually hardware, a clamp-like device which will press a three-dimensional seal into a page. Such a seal is required by some of the federally required "assurance" documents, to assure that the signature and document was genuine. These seals are similar to a seal used by a notary public.

### Color Scanner

I cheat slightly; I have a portable USB scanner from NeatReceipts. This will scan a full page into a PDF. The scanner is even more critical if you are required to submit electronic versions of all documents using Grants.Gov. In any case, if you do a lot of this, consider a decent flat-bed scanner or make sure your copier has a scanning function. Some office All-In-Ones transmit a scanned document directly as a PDF to your PC. Figuring out how this all works may take half an afternoon, but it will be worth it eventually.

## **Color Printer**

My trusty HP ink jet printer seems to be doing fine for producing attractive original pages, cover sheets, mailing labels, etc, with our logo and the logo of the funder. Copies, when required are produced on my black and white laser printer.

## **Laser Printer**

You may be able to get along without both printers, but I use the laser for anything that does not require color, and for duplicate copies.

## **Copier**

On my most recent application, I noticed that my estimated time was about half of what I eventually took. One reason was I got obsessed about making a color duplicate, as the funder required both an original and a copy of the application. In retrospect, it would have saved a couple hours if I simply concentrated on getting the original correctly printed and assembled, and then taken the whole thing to be copied to create the duplicate.

## **Software**

### **Adobe Acrobat**

The Acrobat product line is a confusing mess of add-ons, plug-ins, versions, and levels. Ideally what you want is not just Acrobat Reader, but Acrobat “Professional”, the lowest end of the program that allows you to fill out Acrobat forms, and *save the form with the filled-in content*. If in doubt, test beforehand. Otherwise, you may end up spending hours filling out a form, and end up not being able to save it. (!). In such a case about the only thing you can do is to print it out, and rescan it in as a graphic file. Since the form-filling process sometimes takes several tries, the whole workflow is greatly extended if you have to print and scan each time. Either spring for the cost of the Acrobat program, or have a cast-iron alternative worked out using Ghostscript or some alternative (and tell me what your solution is. )

### **Word-processing**

Recently I’ve been using Mac iWork Pages ‘09, which reads the Word .DOC format fairly well. Regardless of what software you choose, set up a template for your proposal narrative that conforms to any oddball requirements of the funder. For example, your funder might require:

- 1 inch margins all around the page
- Minimum of 11 point type size
- Ariel, or Helvetica, for san-serif typefaces
- Times Roman or Garamond serif.

Set up your type styles, but keep the number down to as few as possible.

- Heading 1, Heading 2, Heading 3
- Body
- Body Bullet
- Caption
- Page Header
- Page Footer
- Title

If you expect to do a lot of team-based writing and combining several versions of the documents together from multiple writers, try to make sure that everyone starts with *exactly* the same template, and if you can manage it, have everyone use the same word-processing program. If you are working cross-platform save in an intermediate format such as .RTF or use the Word 2003 .DOC format. Figure out who is the keeper of the “master” file, and all those who are subordinate should keep their formatting to a minimum because the chances are anything imported into the master file is going to be reformatted anyway.

One advantage of Windows Word, aside from ubiquity, is that there are citation and bibliography manager add-ons. (i.e. [EndNote](#)). This is a huge deal in academic writing as with a large proposal you end up with a couple hundred citations, with footnotes and a bibliography. (Update: The latest EndNote claims to support iWork '09, and the open source Office Writer, as well as Word).

### Spreadsheet

You’ll use a spreadsheet program to prepare the pre-budget. This is the "real" budget that actually shows where the money is coming from, and where it will be going. You'll use this spreadsheet as a basis for filing out the SF 424 A budget spreadsheet or online form for the budget. Work all this out before hand in your spreadsheet program

### Timeline Program (Excel, or other spreadsheet program)

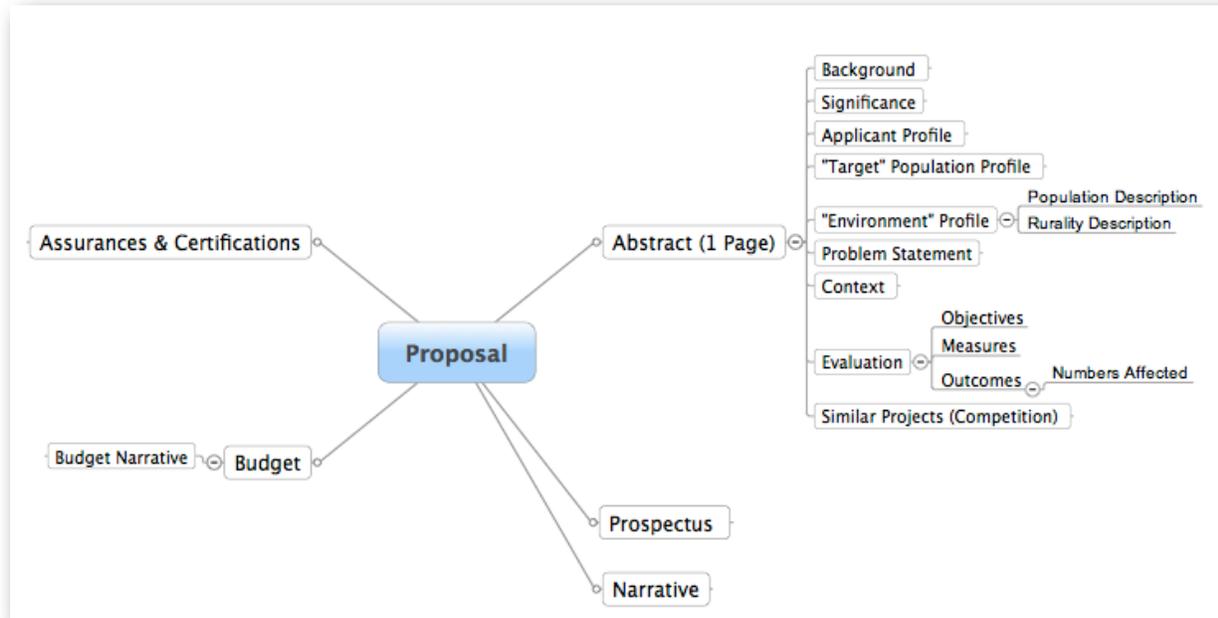
Every application that entails a performance over time will require a timeline. While this *can* be simply added as text, we usually use Excel to create a timeline, with colored boxes showing who is doing what, and the various tasks shown as rows. They are a simplified form of a Gantt chart. If you want to get fancier, you can produce real Gantt charts from a project manager program.

Tasks	Qtr 1	Qtr 2	Qtr 3	Qtr 4	Qtr 5	Qtr 6	Qtr 7	Qtr 8	Resource
Baseline Surveys	■								1
Vt 3.0 Event Planning	■				■				2
Vermont 3.0 Event		■				■			2
Post VT 3.0 Surveys			■				■		1,2
Mid Project Surveys				■					1
Permanent Office Est.			■						3,4
Executive Director Hiring		■							4
Consolidation Negotiations	■								3,4
End of Project Surveys							■		1
	1 = VtSDA Project Manager				4 = VtSDA President and Board Members				
	2 = VtSDA Vermont 3.0 Tech Jam Chair								
	3 = VtSDA Executive Director								

*Timeline created using iWork Numbers spreadsheet program*

## Graphics and Charting

For other charts and illustrations, Microsoft Visio is a good candidate on the Windows platform. I have yet to find an equivalent program on the Mac. Visio can also be used for timelines. I've recently become enamored of [MindJet MindManager](#), available on both Mac and Windows for creating outlines, and illustrating relationships and processes. MindManager is also great for diagramming the grant outline process itself.



*Mind Map: Grant Documentation*

## Things to Do While Waiting for Others

In a team situation, or a reasonably complex application, there will be times when you are waiting around for people to send you things, like letters of support. This is an opportunity to get some the scutwork out of the way.

### Set up cover sheets for various sections

If you are printing out sections and will actually submit the application as hard copy, then there are probably some logical sections of the application that should be kept together. For example, letters of support should be kept together, as should the assurances. I create cover sheets for these and include a checklist for each set of documents.

## Budget Documents

### Budget Spreadsheet

I find it useful to get a rough budget prepared immediately, and I start circulating this as soon as possible. There is nothing like actual numbers to concentrate peoples' minds, both as an inspiration and a reality-check.

### Budget Narrative

This is the explanation of the budget spreadsheet which is used to explain assumptions used in the budget if these aren't already clear from the budget numbers. Even if it is clear; most applications require a narrative. I use this to explain things like my assumptions for salaries and fringe benefits, and an explanation of indirect costs, if those are included in the budget.

### Letters of Support

Letters of support are contributed by:

- Beneficiaries
- Contributors and Partners
- Third Party Validators

See the Grantwriters Toolbox: Letters of Support for more.

### SF 424 A (Budget Spreadsheet)

For federal applications, and many others, there is a prescribed form for the budget which is often quite different from your own spreadsheet budget. You will need to translate your spreadsheet into this form. Sometimes there is a separate budget required for each budget year, if your project takes more than a single year. You may also have a separate budget for each subcontractor or partner. In a worse case, for example, if you are working with a subcontractor, and you have a three year project plan, your federal budget will consist of six separate budgets, plus a consolidation budget which shows the totals of all separate sheets.

### "Federal Assurances"

These are (often) multiple page forms, which require a signature. Since they have no dynamic information, they don't change as you develop the proposal, and you can get these ready when you have some downtime. Examples:

- Compliance with Disability Act (ADA)
- Drug Free Workplace
- Non-Discrimination
- Demographics & Statistics

#### The Grantwriter's Toolbox

For more information on non-profit technology go to <http://www.techfornonprofits.com>

The logo for Microdesign, featuring the word "microdesign" in a bold, lowercase, sans-serif font. The letters "i" and "n" have blue dots above them. The entire word is enclosed in a thick, black, rounded rectangular border.

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