# HUMANITARIAN FUNDS


# How to Write Proposals under Tight Deadlines

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# How to Write Proposals under Tight Deadlines

*A handy resource for successfully navigating proposal process under time constraints*

This guide aims to provide NGOs with simple tips on how to be prepared to write proposals under tight deadlines. This guide has a collection of useful advice to help you ensure that much coveted and awaited opportunities do not slip away from your hands only because of less time and resources. The tips in this guide book will come in handy to help you navigate the proposal development process with utter ease and efficiency despite tight deadlines.

## The background:

In an ideal world, all of us working in NGOs would receive the best grant opportunities and ample time to submit our proposals. But we do not live in an ideal world. So what we have to manage with is - too little time, limited resources and facing too many applicants for every single grant opportunity. What makes it tougher is the limited time frame to apply for many grant opportunities. Most of the time, NGOs end up writing proposals under tight deadlines either because of the limited timeframe offered by donor agencies for the submission of the grant applications or we learn about potential opportunities quite late.

In order to pragmatically deal with such situations, this guide aims to provide NGOs with simple tips and tricks on how to be prepared to write proposals under tight deadlines- without compromising on the quality and the due process. The nimble tips explained in this guide would make your proposal development process quick, easy and efficient so that you can put your best foot forward in the face of serious time constraints for submitting your grant proposals.

A proposal is your very essential document that demonstrates how you intend to deliver impact in the domain and geography you work or plan to work. A proper proposal submitted in a timely manner initiates and cultivates an initial professional relationship between an organization and a donor. It is imperative that a quality proposal has to be submitted to stand a chance to win any funding opportunity. Let us understand step-by-step the key processes you can employ to ensure that you submit quality proposals while also sticking to the timelines.

*Note: This resource book will focus on working on and submitting the proposals within the most critical constraint- TIME, and it is assumed here that the person reading this book already has a grasp on writing proposals, and is looking for specific tips around making the process time effective, error-free and efficient.*

## 1. Analyzing the Grant Opportunity:

The first step is to analyze the grant opportunity in front of you. There are hundreds of grant opportunities available to the NGOs on a daily basis. Yet it is important to put in efforts towards researching and shortlisting the best suited and realistic opportunities. Making the decision as to apply or not to apply is key to ensuring time and resources are being used wisely. Key decision makers on this might vary from organization to organization but mostly it is the leadership team (and sometimes the board) and the staff. To ensure every stakeholder understands the requirement clearly, you need to analyze the RFP/ grant opportunity thoroughly.

Once you have an in-depth understanding of the opportunity and once you are sure there is synergy between your NGO's work and mission and the grant opportunity, you can summarize it and present to the decision making team/s in your organization. You can organize a meeting with the relevant stakeholder to decide on go or no-go. This can involve the teams and the board as per the decision making processes in your organization. While you are doing this analysis, make sure that you understand the opportunity fully, along with any hidden requirements, the overall scope of project, the resource requirements, legal and logistical requirements and prerequisites, etc.

As described in detail in our resource book named 'How to research and identify donors for your NGO', a donor mapping and profiling process will be very helpful in both- the immediate requirements and also in the long run. Based on aspects like eligibility criteria, theme, geographical focus, etc., this process can help you where to focus your time and energies for more detailed donor research that will follow this step. It would answer the questions like:

- Which prospects can be explored more for detailed profiling by research
- Which prospects are high/ medium/ low priority as per parameters set by you
- Which opportunities are low hanging fruits and need immediate attention
- What your short term/ long term timeline should be, and so on.

You can create a Donor Mapping Dashboard in a Google Sheet, in which you can include information about prospective grant agencies. This will help you maintain a summarized version of your prospective donor database which you/ other in your organization can refer to at any point. The key objective of this sheet must be: maintaining a proper updated database for grant opportunities; and populating the relevant grant and the organization-related information that can help in quick and comprehensive decision making. This sheet has to be a live dynamic document, which must be updated regularly to stay up to date with the latest opportunities with application timelines and details. Here is a template for your reference:

**Table 1: Donor mapping matrix with timelines:**

| S.No. | Donor Prospect Name and Category | Key Focus Areas/ Themes | Geographical Presence/ Focus | Funding Mechanisms | Funding Timeline | Current Partners or Projects Funded | Typical Budget/ Support |
|---|---|---|---|---|---|---|---|
| *1.* | *USAID, UNESCO, etc. (Bilateral Agency/ Multilateral/ Alliance/ Foundation…* | *Human Development, Health, Education…* | *Donor emphasis on which geography/ current funding focus…* | *Any open opportunities for seeking funding, timelines notes..* | *Typical timeline __ as per domain ____* | *Understanding of current partners/ typical projects funded* | *If information available* |
| *2.* | | | | | | | |

As and when you come across the grant opportunities by these organizations, you can mark them in green/ amber/ red as per the timeline you have.

***Quick Tips:*** **Timelines:** *Colour coding of your donor mapping table will help you in quickly eliminating/ selecting prospects for further research and for submitting the proposals. (E.g. Green can be high priority ones, red could be delayed for next year and so on).* ***Notifications:*** *Set Google Alerts for the most important opportunities once you put them in your calendar to ensure you get reminders and notifications. This will help you in working backwards once you are aware of the timelines.*

Please note that this system will be beneficial in the long run as well. However, if the most critical factor is time and deadlines, hold this process until later and present the opportunity to your board/ leadership team or decision makers in your organization. Once the decision is made for going ahead, jump quickly to the next steps described here. In case the decision is to hold on, mark it clearly in your calendar for review later again.

## 2. Preparing the teams and delegation:

Once it is decided that you are going to apply for the grant, the next step is to delegate the tasks and responsibilities. To make the process efficient, it makes sense to divide tasks and rely on the teamwork. At this point, it is important to note that one person has to be responsible for coordinating the entire process.

This person must study the requirement in detail and must list the requirements very clearly on a shared document preferably. See if you have to follow a particular format or you can have your own. It will help to organize a pre-proposal meeting wherein the proposal submission can be broken down to specific tasks and can be delegated to relevant teams and persons. The right timeline can vary from person to person or team to team, but it is important to acknowledge that the time frame is limited and timelines must be assigned accordingly.

Some tips to make this process efficient and cogent:

- Set task-wise deadlines based on dependencies as applicable (C depends on B; B depends on A). For example, the coordinating person who is in-charge of proposal writing can only start writing the proposal once the logical framework is in place- which is to be written by say M&E team. And once the logical framework is in place and activities are specified, the finance team or the proposal writing team can prepare a budget based on them. These dependencies will be brought forward during the pre-proposal meeting.
- Put people's names in front of the task lists to ensure accountability and to reduce confusion. Even if a team is supposed to provide you with information, make sure one person is held in-charge of the responsibility of making it available
- Set the timelines well ahead of the actual deadline. Make sure you have time to review the bits and pieces of information and the proposal makes coherence in flow and logic.
- Team motivation: This is the most important yet most overlooked aspect of any high-stress, high-stake and crucial project. When the stakes are high but time is limited, to ensure that the information and documents arrive well in time for you to work on the final proposal, it is of utmost importance to make everyone realize the stakes and to bring everyone in the team on the same page. This is why giving ownership to people is critical- for their processes, for their data that they handle or own, for making sure they present it in the format that makes sense for the proposal.

- Create milestones and checklists: This will help in keeping track of all the forms and documents. Share these with all the collaborators, but make sure one person is responsible for tracking everything.

You can use the same template as described in section 1 above and add a new sheet to the same Google Sheet to put the broken down tasks in tabular format with the following columns:

**Table 2: Task and responsibility division:**

| **Grant Application for Donor Agency ABC (Deadline 26 June 2019)** | | | | |
|---|---|---|---|---|
| **S.No.** | **Task** | **Responsible person/s** | **Timeline** | **Location of documents on Google Drive** |
| 1. | Providing a logical framework for the proposed program model | E.g. Paul | 20 June 2019 | Link |
| 2. | Providing team members names and role descriptions | E.g. Maria | 20 June 2019 | Link |
| 3. | Findings and data from the pilot and overall organizational information and data | E.g. Irene | 20 June 2019 | Link |
| 4. | Visual content (photos, media, videos) to enrich the proposal | E.g. Tom | 21 June 2019 | Link |
| 5. | Proposal framework completion | E.g. Raj | 21 June 2019 | Link |
| | And so on… | | | |

In this way, you can ensure clear role divisions and accountability. Make sure the process is done in a participatory manner and everyone buys in the timeline and the role assigned. You can make a calendared timeline too to make sure everyone knows what is required to be done by when and the milestones and end goal are visible to everyone. (can be done in Google Calendar too). Here is an example of such a calendared view:

**Table 3: Calendared proposal work timeline with key milestones:**

| Sunday | Monday | Tuesday | Wednesday | Thursday | Friday | Saturday |
|---|---|---|---|---|---|---|
| | | | | | | 1 Go/No-Go meeting |
| 2 | 3 Kickoff meeting<br><br>with teams | 4 *Enquiry submission to grant agency* | 5 *Constant touch points* | 6 *Constant touch points* | 7 Basic Logframe and project framework | 8 |
| 9 | 10 First draft of overall narrative | 11 | 12 Data related to project proposal | 13 | 14 Legal documents | 15 |
| 16 | 17 Logistical framework and operational requirement | 18 Budget for the proposal | 19 Complete logframe | 20 | 21 First proposal draft ready | 22 |
| 23 | 24 Review and work on supporting documents | 25 Submission | 26 **Deadline 5 pm** | 27 | 28 | 29 |
| 30 | | | | | | |

Please note that some grant organizations clearly mention the last date of enquiries which is different that the submission deadline. This is basically a timeline by when you can deliberate and ask any questions related to the grant opportunity. This information can be very useful in understanding the requirement more clearly and to clarify your doubts if any, and also in ensuring your proposal fits the bill correctly by enriching it with more detailed information.

Even at this stage, upon enquiring and finding out that you might have to forego the opportunity due to lack of resources, any legal requirements, logistical or operational issues, etc., make sure to document the issues and archive the related information for your future use.

## 3. Working on the proposal:

Once you have all the required information and data as planned, it is time to set the ball rolling. As we are focusing on working on and submitting the proposals within the most critical constraint- TIME, we will discuss the proposal work from that perspective in this section. Thus, we assume here that the person reading this book already has a grasp on writing proposals, and is looking for specific tips around making the process error-free, efficient and time effective. So, to make sure your proposals get submitted in time, are high quality, utmost professional, error-free and win the deals, you need to streamline the systems in your NGO.

### 3.1. Systems:

Here is why the systems are so vital. If you create and maintain a systematic database of your prospective grant organizations, it will be hard to miss any opportunity that could be of relevance to your NGO. Also, if the information management systems are robust in your organization, you would be maintaining records and proper documentation of all the current projects and data in a central repository. This can be a Google Drive (or a Google Team Drive) or any other centralized information management system.

If you are already doing so, the proposal submission within tight deadlines will become a piece of cake for your NGO. If not, it is time you started doing it. Create a common shared drive (or Team Drive) and divide it into sub-folders. Each folder can have separate owners as per your organizational structure. E.g. Monitoring and Evaluation (M&E) team manager can handle the data flow and archiving in M&E folder; Communications manager can handle the Communications and Media folder and so on.

This will make your last minute work so easy, because at any point you can access all the required information in these shared folders. Make sure that these are maintained and updated regularly. If your organization uses any other system for information management, make it a point to state your requirements clearly so that the person in-charge can extract reports in the format you need for the proposal writing.

### 3.2. Proposal Formats and Templates:

Check if the grant providing organization has given a format for proposal submission. If they have, you will have to stick to that. You must follow the guide for proposal format, flow, style etc. or you can face rejection. If there is no specified format provided, you can use your own. In either case, it will help if you keep certain templates and information ready as per the tentative sections of a typical proposal.

Remember that proposal writing is a time-consuming process and a complex one. The dependencies and the flow of the proposal have to be cogent and systematic. Once you start receiving the information and data, we advise you for putting it all together and fine-tuning it at a later stage. While proofreading and corrections might bring out inconsistencies which will need to be corrected at later stages, starting refining the work right from the beginning slows down the pace a lot and sometimes multiplies the effort. So, it makes sense to first put the proposal sections together in whatever form you have received it and to refine it once most of it is in place.

As discussed above, it would be very useful to keep the typical templates and formats ready for creating a proposal. Even if the template is set by the organization, you can use some of the sections which are kept ready from other proposals or in your central repository. For example, if your baseline data is up to date, you can fetch it to feed in your secondary research or background section to set the context. On the other hand, sections and information like organizational profile, Board of Directors, Financial Statements and information, most of the promotional material are mostly static and can be used readily if it is maintained in a consistent format.

Here is an example of one of the typical blueprint of a proposal with suggested section heads:

- A cover letter (Stating NGO's interest and summarizing the proposal synergy with grant organization's requirement)
- Organizational Information (with overview and overall model, geographical and thematic experience and expertise, past experience, past and current projects, previous and current partners and funding agencies, Board of Directors, broad team information, achievements and accolades, etc.)
- Overview of the proposal (in the form of an Executive Summary and brief budget)

- Context setting (Brief background of the issue or problem at hand backed by the secondary data and learning from primary/ baseline data if available; from local, regional and global perspective as appropriate)
- Proposed program's overall goals and objectives
- Logical framework for the proposed model
- Description of activities and relevant information
- Monitoring and Evaluation plan
- Sustainability perspective
- Financial requirement (the program budget as per your typical budget template or as per the one provided by the organization as part of the application process)
- Supporting documents as needed in the form of attachments/ annexures: e.g. previous similar programs undertaken- data and learning, typical reporting formats, other programmatic and financial supporting documents
- Promotional Material like pictures, case studies, evidence of achievements, etc.

**3.3. Team Work**

The process of forming the right team and delegation of tasks cannot be emphasized enough. This includes various aspects of team management, project management and other organizational skills. While it is essential that the tasks are delegated and people are made accountable, an effective manager needs to take multiple perspectives in account and needs to be empathetic and realistic at the same time. Thus, this person who is managing the key roles allocation, has to wear more than one hat. S/he might even need to hire external resources for certain aspects of the grant proposal writing, depending on the scale and nature of the NGO.

If you are that person, try your best to take the team along, hold frequent check back meetings and offer face-to-face interactions to help unclog any bottlenecks which might be hindering the process. At the same time, maintain the accountability and set guidelines as to when the ball reaches the other person's court to ensure timely delivery of tasks and to further streamline the process as you start putting in the various pieces of the jigsaw puzzle.

**3.4. Systematic Review:**

Once you start receiving the information and data from various teams or individuals, start the review simultaneously to make the best use of time. Do not procrastinate the systematic review till you receive all the information, as that will delay the process significantly. This is very likely to happen because of the probable dependencies of tasks and various aspects. For example, if you start reviewing the activities section at later stages and you realize some key activities are missing or can be added, and you start doing those changes, it will have consequences on the budget as well. In the end, if you still manage to spot the areas where these changes are do be done, the process becomes messy and the end-results appears to be unclean and less professional. This is something you certainly do not want to happen.

Hence, start the systematic review as soon as you start receiving the data and documents. Visualize a coherent and cogent flow as per the format and start putting the bits and pieces into it. This way, you will be able to identify any missing links, errors and deviations from the fundamental proposal skeleton.

In the meantime, you can start your secondary research about the issue at hand that your proposed program or project is going to address. Also make sure at the key junctures as per the timeline or the milestone calendar that all the required organizational documents (legal, procedural, financial, etc.) are also in place to be submitted along with the proposal as required.

## 4. Connecting the dots: Putting the Proposal Together

Once all the required information is collected, you can start fitting it in the proposal format you started with. Now that all the pieces are put together, review the proposal from a bird’s eye view. This means that you need to review the proposal in a very objective manner. Try looking at it from the donor’s lens and visualize if this looks like the best fit to their requirement or offer. It is now that all your in-depth research about the donor organization will come handy to help you make a perfect match between the requirement and the proposal.

Once you have done systematic reviews and proofreading internally, you can even ask an external consultant or advisors for an external unbiased review for their feedback. This can be possible if you are moving ahead as per the planned timeline and have that gap to accommodate time for review. If you do not have that much time, you can share sections which are ready with an experienced board member or advisor for their feedback while you put the organizational documents and supporting documents together.

While working on a proposal which you wish is as perfect as you can make it, it is equally important to know when to stop. Even if you are a perfectionist, it is essential to acknowledge the trade-off between best quality work and the timelines. While we are sure you would benefit from the guides, tips and resources given in this book and would be able to make high quality proposals, the perspective of quality varies from person to person and it is up to you and your team to stick to high quality standards while also not losing critical timelines. So proofread, proofread and proofread. Get external opinion and make sure you save time for that. At this stage, check and confirm as per your checklist that all the required supporting documents are also in place with the proposal/ application.

Once you and your team feel confident about the proposal, you can submit it. A practical advice here is to not to wait for submission until the last hour. If you end up there, you risk being in the nervous nineties and might overlook certain things which would jeopardise the success of your proposal. Try your best to submit the proposal at least 1-2 days before the actual deadline to avoid falling in the stress trap and to complete the process with a calm mind.

### 5. After Submission: Post-facto Analysis:

Congratulations! You have made it in time. You have submitted the proposal of high quality and have ensured the submission within the specified timeline. For this, you deconstructed and absorbed the RFP, appropriately captured the requirements, took the team along, did your background research, worked through the constraints, and put the entire process in motion.

At this stage, a post-facto analysis will be very beneficial for future by analyzing and articulating the lessons learnt. Consider including a brief review of lessons learned by previous proposal teams as well. Aside from having the proposal documents on the shared repository folders or on the Google Drive, make sure that lessons learnt are also documented and archived systematically on the shared common repository spaces for future perusal.

Thank your teams as they have made it possible! We hope you would acknowledge that winning a proposal is a complex process and depends on a whole lot of things other than the quality of proposal itself. For example, the quality of background research, your reputation in the sector as an NGO, testimonials from your current and previous partners, funding aspects and priorities, and many other factors involved. So all the best for bagging the most coveted opportunities. But even if you do not, there is ample learning involved in the process so learn and relearn and try and re-try. Good luck!



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