USER'S GUIDE
GOVERNMENT RFPS AND GRANTS

The Proposal Pack Users Guide to Government RFPs and Grants was created to help you efficiently complete government grant proposal and funding applications. The guide provides methodologies and describes approaches to addressing difficult, frequently encountered grant writing and production issues.

Many examples and references in this manual are for federal grants; however, county, state and local government grant applications and RFP submissions are handled in the same way, in terms of building your proposal response document using Proposal Pack.

https://www.ProposalKit.com

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INTRODUCTION

This guide was created to help you efficiently complete government proposal and grant applications. The guide provides methodologies and describes approaches to addressing difficult, frequently encountered government proposal writing and production issues.

Many examples and references in this manual are for federal grants; however, county, state and local government grant and RFP applications are handled in the same way, in terms of building your proposal framework using Proposal Pack.

Proposal Pack offers ready-to-use templates and headers covering information requests from government agencies. We added new templates as well as explanations on how to use them with RFP and grant applications, and we suggest opportunities for you to create your own customized headings for specific content. RFP and grant application examples are included, using both the "government-wide" and "agency-specific" forms that commonly appear in government applications. All examples meet specifications listed in the federal guides, found at https://www.grants.gov.

There are tens of thousands of new government RFPs issued every year and the shelf life of each ranges from a few months to a year. Proposal Pack is not designed to give you a ready-to-fill-in complete proposal for every one of those tens of thousands of RFPs. That would be an impossible task for any proposal writing tool. What Proposal Pack gives you are thousands of individual templates which cover information requested by most government

RFPs. Read the government RFP, then select a subset of Proposal Pack templates and arrange them in the order requested by the government RFP, then make minor customizations to the Table of Contents to match more exactly the requirements of the RFP. For example, you may want to rename the "Community" template to "Community Involvement," or change the "Project Budget" template name to "Budget Narrative," and so on; if that is what the RFP specifically asks for.

You will see from the included examples that the same process and set of Proposal Pack templates can be used to respond to any government RFP from any agency.

Government RFP and grant application toolkits may give you a few worksheets and forms to include; however, they will not supply all of the material you need to assemble a complete proposal. That is where Proposal Pack comes in to help you. With Proposal Pack, you can assemble a complete complex document matching the types of information requested by a government RFP. After you have used Proposal Pack to assemble the framework of your proposal, then you fill in the forms with the content of your proposal as required by the RFP.

PURPOSE OF THIS GUIDE

This guide provides approaches useful to organizing grant application content requested by the 26 federal government agencies that fund grants as well as government RFP responses. It informs the user of published standards from federal agencies and uses sample grant applications to illustrate successful proposals.

The guide is divided into four parts:

1. Preliminary grant development activities,

2. Proposal writing guides,

3. Proposal Pack templates and headers applied to sample government grants, and

4. Checklists, forms, matrices and resources helpful to planning, writing, and completing government grant applications.

WHY IS THIS GUIDE NEEDED?

Many Proposal Pack users have asked for our guidance in the area of completing government grant and RFP applications. Many grant funders request the same information, even if they use different words, phrases, or questions. Federal agencies are in the process of moving all applications online, while still capturing applications in print. All federal agencies use mandatory "government-wide" and "agency-specific" forms in their applications. All this can add confusion during the grant application development and production processes and reduce your chances of success.

You should recognize that government agencies require the use of their specific grant application forms and expect applicants to follow instructions exactly.

Government RFP requirements always take precedence over any text, samples, examples, illustrations or recommendations found in Proposal Pack content. Where needed, customize the Proposal Pack materials to fit the requirements of the RFP. If the Government RFP specifies a maximum number of pages, page line spacing or exact Table of Contents page headers, always use the RFP as your guide and customize the Proposal Pack templates to match.

KEY RECOMMENDATIONS OF THIS GUIDE

⊞ Authors of grant proposals should begin by understanding all the pertinent program criteria related to the Catalog of Federal Domestic Assistance (CFDA) program from which assistance is sought. Those without previous grant writing experience should attend a grantsmanship workshop offered by the federal agency from which the grant is sought.

⊞ Determine whether the idea of your proposal has been already considered in your locality, region and state by asking legislators, local government officials, or related public/private agencies with current grant awards or with contracts for similar work.

⊞ Validate community support for the proposal by obtaining letters of support (or Support Letters or Commitment Letters) identifying exact areas of project commitment and sanction prior to submitting your proposal. This process may take several months to conclude, but many federal agencies require this in writing; e.g., partnership/affiliation agreements, mutual agreements, memoranda of understanding (MOUs) or shared services between agencies.

⊞ Confirm that there is a match between the **Objectives and Uses** and **Use Restriction** sections of the Catalog program description and your agency in terms of needs, interests and intentions.

⊞ Establish a **Review Team** to critique your application (usually a neutral third party) and direct them to provide constructive criticism throughout the process.

- Capture required **Signatures** from the related institutions in the proposal and make sure that these individuals are aligned to your request early in the process.

- Federal guidelines identify eight components of a good proposal package:

  - proposal summary (Abstract)

  - introduction to the organization (Company History)

  - problem statement or needs assessment

  - project objectives

  - project methods or design

  - project evaluation

  - future funding (Sustainability)

  - project budget

  Review your application to make sure that all eight items are included.

- Take advantage of the most recent U.S. Government Printing Office resources for grants and proposal writing; contact the Superintendent of Documents, Government Printing Office, Washington, D.C. 20402.

- Read the government RFP and create a Table of Contents of information being requested. Select an appropriate collection of Proposal Pack templates matching the Table of Contents, then edit the Proposal Pack page headers to match the Table of Contents as needed. Assemble the templates in the proper

order. Make sure that the contents are placed in the sequence required in the grant application guidelines provided by the agency funding the project. Many examples of how to do this are included in this manual and in the sample government grant proposals included in Proposal Pack.

Note that there are very few standards between RFPs across agencies or even within the same agency as to how Table of Contents items are titled.

There can be 20 different variations on how different RFPs ask for Budget, Company History or Project Summary information. You will find Proposal Pack templates which will cover most requested information; however, the names of the forms or of the items within forms may be slightly different. We have included mappings from 10 different government RFPs so you can see how to analyze and map any government RFP to an appropriate collection of Proposal Pack templates. For example:

- If the RFP asks for "Community Needs and Benefits," you can use the following three Proposal Pack templates: "Community," "Needs Assessment" and "Benefits."

- If the RFP asks for "Summary Narrative," you can use the Proposal Pack templates "Project Summary," "Summary" and/or "Abstract."

- If the RFP asks for a "Statement of Experience" from your company, you can use Proposal Pack templates "Company History," "Capabilities," "Qualifications," "Awards and Achievements" and a number of other templates to provide information about your company.

QUICK START (READ THIS FIRST)

Responding to a government grant or RFP can be a time-consuming task taking days, weeks or even months. Proposal Pack can be used to generate a framework for your proposal in just hours. By a proposal framework, we mean a complete document with a cover letter, table of contents and all of the form pages ready for you to fill in with the content of the proposal.

The first time you use Proposal Pack will be the most time-consuming, as it can take a few extra hours to explore the thousands of pages of material provided in Proposal Pack and understand how each template relates to the specific RFP you are responding to.

After you understand how to use Proposal Pack and how to map a government RFP to a set of Proposal Pack templates, you will be able to create a proposal framework from 20 pages to 100 pages (or even longer) in just a couple of hours.

Follow these basic steps to set up your proposal framework:

First - Read the Proposal Kit documentation. This is the other manual included in Proposal Pack, with the file name Documentation.PDF. We know nobody likes to read documentation; however, writing proposals necessarily involves a lot of research and reading. If you call us for help, the first thing we will suggest is that you follow every step in this Quick Start, including reading all the documentation.

Second - Open the Proposal Pack desktop organizer and look at the index of all of the Proposal Pack templates. Take the time to read the descriptions of all of the included templates so you understand how much material is included. There are thousands of templates to cover most situations you will encounter in responding to a government RFP. Out of these thousands of templates, you will select the particular forms you need (which could be 10, 20, 30 or more). Before you can find the specific templates that apply to your RFP, you will need to review the entire list to understand what is available.

Third - Review the government grant sample proposals included in Proposal Pack. You will gain an understanding of how other users have taken a collection of Proposal Pack templates and assembled them in a particular order for specific RFPs if you look at the examples we have provided before you try doing it yourself.

Fourth - Read this entire manual on how to write government grant proposals.

Fifth - Read the government grant application guidelines and toolkits provided to you by the agency you are responding to. You will be able to build a map or Table of Contents from what the grant application guidelines say to include in the proposal. Some RFPs will actually give you a table of contents they want followed to the letter; others will give you only a general idea of what to include. Either way, build your own Table of Contents.

Sixth - Create a spreadsheet to map the Table of Contents you have come up with after analyzing the RFP guidelines and choosing a set of Proposal Pack templates. Read the examples of how this was done for a variety of government grants in the

Appendix pages of this manual. You will follow the same process to use Proposal Pack to respond to any government grant RFP.

With tens of thousands of new government grant RFPs being issued every year, it is impossible for us to provide these mappings for every grant that comes out (we would have to add hundreds of new mappings a day to this product, which is an impossible task). You will have to do the mapping work yourself, using the tools and instructions we have provided for you.

Seventh - Assemble your selected Proposal Pack templates by appending them together, fill in the blanks with your proposal content, then follow the RFP application guidelines on how to package and deliver your final proposal.

Barring unexpected problems reading documentation or using more advanced features of your word processor or graphics program, you can set up a complete government grant proposal framework and be ready to start editing in just a few hours.

If you use our add-on Proposal Pack Wizard, many of the manual steps above (such as appending many documents together, merging contact information and creating client folders) will be performed by the Wizard. This will speed up the process even more.

PROPOSAL PACK PRIMER FOR WRITING GOVERNMENT GRANTS

Phase 1: Getting Ready

The winning government grant proposal is carefully planned, organized according to funder requirements, concisely written and ready for the scrutiny of government agency reviewers. Applicants should be well versed in the program criteria published in the Catalog of Federal Domestic Assistance (CFDA). Contact should be made with the person(s) listed by the agency responsible for information about the funding area. Check with the funding agency both online and directly about deadlines, any changes, basic requirements, application forms and procedures.

We recommend that individuals without previous grant proposal writing experience attend a grantsmanship workshop. These workshops increase your understanding of the crucial information required, offer the opportunity to discuss with other applicants and agency representatives your questions concerning the grant(s) in question, and direct your attention to additional readings or resources helpful to completing the process.

Phase 2: Developing the Proposal

Growing Ideas for a Proposal means that the applicant investigates his/her locality, region, and state to ascertain if the idea has been previously considered. It is important to involve local, county, and state government officials, agency heads, and public/private agencies that may have grants or contracts for similar work. This up-front review may uncover previous work in the area and/or a need to upgrade the concept through your proposal. The key is not to duplicate work and to give the impression that your proposal is significantly different and worthy of pursuit of federal dollars.

Use Federal Guidelines to Establish Credibility for Application by using the CFDA guidelines prior to the application:

Step 1 - Go online and browse the CFDA using one of the indexes provided or a keyword search to locate the assistance programs that match your needs as an applicant.

Step 2 - Determine the best approach for your application by reviewing:

  - Program Objectives and Uses

  - Type of Assistance Needed

  - Eligibility Requirements

  - Application Procedures Required

Step 3 - Check the application deadline.

Step 4 - Identify the Information Contacts associated with the program description you select and capture the addresses and telephone numbers you need to obtain additional information from the funding agency.

Step 5 - Contact the Agency to find out:

- Match of your proposal or project

- Availability of funds or assistance

- Answers to any questions you may have

Step 6 - Develop and write your proposal and apply to the funding agency for assistance.

Establish Community Support

A key to success with federal grant funding agencies is to provide documentation of community support for your project. After you have developed a proposal summary, find individuals or groups representing business, academic, professional, faith-based, or lay organizations willing to support your proposal in writing.

By socializing your proposal idea early in the process, you will not only identify legitimate partners and supporters, but also help to refine the concepts of your approach. The quality and diversity of support is crucial in the various stages of the grant review process.

Capturing a large number of support letters can be very persuasive to grantor agencies. Examples of support are: letters from local government agencies, public officials, area corporate sponsors, academic organizations offering targeted descriptions of commitment and project sanction.

Letters of support are often required by Federal agencies. This may take a long period of time to develop such endorsements, as the proposal may often reflect serving a need for a building, services, or staffing. Generating support for a complex project often has to be negotiated among a number of partners.

Types of Community Support for Your Proposal

- Partnership/Affiliation Agreements

- Mutual Agreements

- Service Level Agreements

- Memorandum of Understanding

- Shared Services Agreements

Successful tactics to garner such support include: Community Conferences, Decision Forums, and Discussions to support the proposal, collect data for the proposal, and develop strategies to create proposal support among large numbers of community groups.

Selecting the Funding Resource

Study the Objectives and Uses and Use Restrictions sections of the CFDA program description to determine if there is a match to your proposal idea. Check related programs and resources. The fundamental element is that both the applicant and the granting agency should have the same needs, interests and intentions if the proposal is to be accepted for funding.

- Establish contact with the potential agency; identify the specific information officer or contact to ask for a grant application kit.

- Develop on-going dialogue with the agency representative(s).

- Preview your idea and seek criticism, direction and advice.

- Send a letter asking for preview and advice on your proposal as early as possible.

- Work to establish face-to-face contact with the agency's regional office or headquarters staff to develop the long-term relationship needed to succeed.

- Monitor federal agency funding information reports to identify likely sources.

- Study the eligibility requirements for each program you are considering.

- Identify the deadline for submitting the application as it is often associated with agency timelines for review and approval.

- If your idea is not accepted, ask if they know of another agency that might have interest in the proposal.

Phase 3: Writing the Proposal [1]

Pre-Assembly

- Assemble appropriate documents; e.g., agreements, by-laws, tax exemption status certificates, articles of incorporation, etc.

- Form a Critique Team, usually neutral third party colleagues, to review your drafts for match to agency mission, clarity, rationale, and continuity. Use the team's constructive criticism prior to submission to the Federal agency.

- Organize and collect required signatures from institutions aligned for the proposal and make sure that they appear in the appropriate sections of the documentation.

- Organize at least two readers to review the proposal for spelling, neatness, packaging of proposal according to agency requirements, uniform presentation, etc.

- Determine whether you will use online or print delivery. Online delivery requires pre-registration with Federal Government at https://www.grants.gov. Also, make the arrangements to ensure delivery according to the funding agency requirements.

Basic Components of Federal Government Grant Proposals

- Proposal Summary (Abstract)
- Introduction of the Organization (Company History)
- Problem Statement or Needs Assessment
- Project Objectives (Goals and Objectives)
- Project Methods or Project Design
- Project Evaluation
- Future Funding or Sustainability
- Project Budget

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[1] Based on a narrative provided by the General Services Administration, Office of the Chief Acquisition Officer, Regulatory and Federal Assistance, **Developing and Writing Grant Proposals**, Washington, D.C.

Proposal Summary (Abstract): Details Project Goals

Often called the Project Abstract, Abstract, Summary or Executive Summary, this appears at the beginning of the proposal and is usually two or three paragraphs in length. It provides a brief summary of the key points of the proposal, including project objectives, what's new and different, critical activities to the success of the project, and how you plan to support a local need. If you are awarded the grant, the Summary is usually placed in publicity pieces, annual reports, or on web sites about the project.

Introduction of the Organization (Company History)

Applicants provide data about the organization from all sources. Most proposals require descriptions of the applicant's organization, key staff members, board members, etc. Many Proposal Pack templates are related to information about your organization. Key descriptors can include:

- Biographies of board members or key staff members involved with the project.

- Organizational framework narratives: goals, objectives, philosophy, success record with other grantors, key success stories.

- Match of data about the organization to the grantor's goals to demonstrate credibility in the application.

Problem Statement or Needs Assessment

The Problem Statement or Needs Assessment is a major part of the proposal, offering a statement of the problem or the reason for the project. It includes well-documented facts/statistics, shows logical progression, provides comparative data, and is concise. Many Proposal Pack templates can be used to describe various types of information included in or related to the Needs Assessment. The Problem Statement/Needs Assessment:

- Identifies the basis of the project — the purpose for developing the proposal.

- Defines the beneficiaries: who they are and how they will benefit. It's a good idea to back up your claims with the results of needs assessment surveys or studies done by a local group.

- Describes the social and economic costs to be addressed.

- Details the dimensions of the problem (causes, symptoms, impacts).

- Provides historical perspective — how did the applicant come to understand the nature of the problem and the current actions being taken to alleviate the problem?

- Describes how, after funding ends, alternatives may be addressed to explain sustainability for future success.

- Provides the Federal agency with a review of the approaches you will use to solve the problem, the resources needed and a description of how and why they will be applied.

You should contact local, regional or state government agencies to identify tools and techniques to measure and assess problems. Local colleges and universities offer courses to help you plan and

evaluate these techniques. However, we advise you to focus on using data that is qualitative and quantitative.

Project Objectives (Goals and Objectives): Describe Goals and the Desired Outcomes

Every funder wants to see the key steps to accomplish your project. No matter what you call them—mission, goals, objectives, activities, action items, or tasks—they are the key components of your project and show how the work will flow and which activities will be used to target success. In Federal agency grant submissions, the focus is on explaining the specific activities in the proposal. Additionally, applicants must identify the objectives as they relate to the goals of the proposal, and the methods that will be used to reach those objectives. Your checklist for goals and objectives should include:

- What will happen?

- How will you accomplish the work (approach, methods, tactics, strategy)?

- When will it happen (project time line)?

- Who is responsible for the work?

- How will you measure performance?

- Why is the activity being conducted, and with what expected outcomes?

Program Methods or Program Design

Funders want to know how the project is expected to work and solve the stated problem. Applicants are advised to think about the following types of activities in preparing this section of the proposal:

▣ Describe the activities or tasks that you anticipate for the project and include the staff, materials, and resources required to carry out the project (inputs).

▣ Most agencies want a visual description of the organization and the systems used to move the project forward. These provide the reviewer with a clear understanding of how the parts interrelate, when people are needed, and what they are expected to do. This description will also point out the kinds of facilities, transportation, and support services required (throughputs).

▣ Describe what will be achieved through the combination of the activities and the interrelationship among the parts of the project (outputs). Federal agencies expect proposals to "plan for measurable results." Therefore, the project staff is expected to provide evidence of program performance—often through examination of stated objectives and on-site visits by the Federal grantor agency or through grant reviews that involve peer review teams.

▣ Prepare a diagram of the program design. A clear diagram or flow chart of how everything operates will describe the project better than detailed descriptions. If you cannot map project inputs, how the inputs are acted on and the resulting outputs,

you probably cannot describe your project in a way that the reviewer can understand it.

⬛ Provide a narrative that justifies the actions taken. Grantors are looking for the most economic, effective, and efficient ways to solve problems. How the proposal explains the expenses associated with the performance of the project is a key element in the negotiation with the Federal staff. Everything has to be justified in writing in the proposal. Using a tool such as PERT (Program Evaluation and Review Technique) is an effective way to match time and money and demonstrate efficiency when justifying costs in proposals.

⬛ Identify and highlight the innovative features of the proposal by showing how distinctive they are from other proposals under review.

⬛ Build the Appendices to provide additional details that support the narrative with data, references, and information presented in a more in-depth manner. Examples are: time lines, schedules of activities, legal documents, personnel resumes, letters of support, and endorsements.

Project Evaluation: Product and Process Examination

Most Federal agencies require some form of program or project evaluation from its grantees. The requirements differ by type of project; however, the standard deliverables include a (1) product evaluation and a (2) process evaluation. The product evaluation focuses on the results that can be attributed to the project. The process evaluation focuses on how the project was conducted in terms of the effectiveness of various parts of the program and consistency in terms of the stated project methods or design plan.

Federal agencies often conduct evaluations with their internal staff, based on the requirements of the proposed project. Applicants are expected to state the amount of time required to evaluate the project, state how feedback will be provided to the agency, and include a schedule for review and comment. Federal guidelines often refer to two key reasons why applicants should submit good evaluation designs at the start of the project:

1. Persuasive evaluations require applicants to collect key data before and during the program operations.

2. If the evaluation design is not determined at the beginning of the project, a critical review of the thoroughness of the program design is advised.

Future Funding or Sustainability: Long-Term Project Planning

Develop a plan for continuation or sustainability beyond the grant period. This requires the identification of other available resources needed to implement the grant. You should discuss this with allies to determine how the program can be maintained and how future funding would be acquired for the activity to continue. Think about how you would account for other needed expenditures related to the project, such as equipment.

Proposal Budget: Planning and Delivering a Credible Budget

The Federal assistance program funding levels change every year. You should review online documentation of projected future funding levels through the CFDA website. Check the Financial Information section of the CFDA program description.

This exercise can help you anticipate the income level from the grants you are applying for and then consider your budget requirements. According to the Federal agency narratives on budget, a well-prepared budget justifies all expenses and is consistent with the proposal narrative. There are several areas that Federal reviewers check for consistency in proposals:

- Salaries (How do they relate to the proposal and how do they relate to the applicant organization?)

- New Staff Positions (Preparation for additional staff should include space, equipment, materials etc.)

- Equipment Purchases (Are they the type allowed by the grantor?)

- Space Rental (Is the increase in insurance covered? Is there any conflict with the rental and applicant organization?)

- Indirect Cost Rate (There should be no conflict between direct and indirect costs, and the aggregate budget totals should refer directly to the approved formula.)

- Matching Costs (If these are required, the contributions to the matching fund should be taken out of the budget, unless otherwise specified in the application process.)

You should become familiar with the Federal government-wide circular requirements. The CFDA identifies in the program description section information required by the agencies, and directs you to the appropriate circulars applicable to the program for which you are applying.

Additional guides are provided in the Resources: Federal Government Grant Funding Agencies section of this manual.

WHAT'S NEW IN PROPOSAL PACK FOR GOVERNMENT RFPS AND GRANTS?

Many versions of Proposal Pack have been used for many years to respond to government RFPs and grants. This latest version includes even more material specifically created to assist you in responding to government RFPs.

We have analyzed a large number of government RFPs from a variety of Federal agencies, and tailored this version of Proposal Pack to be able to create responses for all of them.

We consulted with experienced government grant writers who use Proposal Pack to craft their responses. Much of this new supplemental manual and research was written by a former college dean and experienced Proposal Pack user who also is a professional government grant proposal writer.

New additions include

- Many new templates that match information commonly requested by government grants. This means you need to do less customizing of existing Proposal Pack templates to create your response.

- This supplemental manual, which provides specific information on how to respond to government RFPs using Proposal Pack.

- Mappings of a number of example government RFPs to specific lists of Proposal Pack templates. Use this as a guide for analyzing any government RFP and mapping the requirements to the Proposal Pack templates.

- A Bid / No-Bid Checklist tailored to responding to government RFPs.

- A Government Grant Proposal Checklist tailored to developing government grant proposals.

- A large collection of sample government grant responses created using Proposal Pack. You can use these as guides for how to assemble your proposal framework for any kind of government grant.

Reminder: Download individual government mandatory forms at https://www.grants.gov.

WHAT'S NOT IN PROPOSAL PACK FOR GOVERNMENT RFPS AND GRANTS?

Proposal Pack Users Guide for Government RFPs and Grants does not contain the specific government agency forms for the dozens of federal agencies; instead, we direct your attention to the online access site that defines and downloads specific forms:

https://www.grants.gov

Many forms and worksheets are supplied by the various agencies for inclusion in your proposal. Make sure to download the most recent forms designed specifically for the government grant application you are responding to. The RFP instructions you were given should direct you to the appropriate forms to include.

Your government proposal will be a combination of Proposal Pack templates, government agency-supplied forms and worksheets, and content you write and acquire to fill in the blanks.

Proposal Pack also does not include complete proposal frameworks for every government grant available. We do not keep track of all current outstanding proposals as that is not possible to keep track of. You have to assemble the Proposal Pack templates provided in a specific order to create a proposal document matching the government grant RFP requirements.

Tens of thousands of new, short-lived government grants are put out every year; no proposal writing product can provide ready-to-fill-in applications for all RFPs. Proposal Pack does not include exact and complete RFP applications or sample proposals for every current RFP that you can just copy.

Professional proposal writers may charge thousands of dollars to write involved government proposals for you; other grant writing software on the market (and even templates) can cost thousands of dollars; and both still require you to do a significant amount of work.

What Proposal Pack does give you is a large collection of templates, examples, instructions and mappings so with a little work you can assemble a response to any government RFP at a very low cost.

HOW TO SELECT PROPOSAL PACK TEMPLATES FOR GOVERNMENT GRANTS

According to experienced grant writers and users of Proposal Pack, the only real differences in applying for U.S. government RFPs, grants and those from private foundations or corporations are the number of forms and sections required. Federal grant funding proposals mandate specific forms, and are typically composed of:

- Cover Sheet SF - 424
- Abstract
- Table of Contents
- Budget Form SF - 424A (Construction) or SF - 424B (Non-Construction)
- Assurances Form SF - 424D
- Drug Free Workplace Form
- Optional Survey
- Lobbying Form
- etc.

Agency-specific forms are indicated in each grant application. Read the instructions you are given to determine exactly which forms, worksheets and other information you need to put in your proposal.

Typical grant funding proposals reflect specific criteria and include point systems based on these criteria. For example, an application would be judged on:

- The capacity of the applicant to demonstrate relevant organizational experience

- Need or Problem

- Strength of the Approach Selected

- How the organization leverages its resources to accomplish goals

- Achieving results and providing program evaluation

You will select the Proposal Pack templates to use in creating your proposal response as follows:

1. First, familiarize yourself with the contents of the Proposal Pack. There are thousands of templates available. Open the desktop organizer for your installed Proposal Pack and read the descriptions of all the available templates.

2. Read the government grant application instructions. The instructions are typically provided by the agency and are usually downloaded from an agency web site such as https://www.grants.gov. For other types of government proposals refer to the instructions given.

3. Read the example mappings of Proposal Pack templates to other government grants provided in the next section of this manual. You will learn how to match them based on similar descriptions.

4. Create a Table of Contents based on the government grant application guide you were given.

5. Select an appropriate collection of Proposal Pack templates to match your Table of Contents. Which templates you select will depend on a number of factors, such as which federal forms are required, what information the RFP is requesting or requiring you to include, how large the project is, if it is a multi-year project, if you are writing the proposal as a partnership, how many certifications are required, etc. The more complex and costly the grant, the longer the proposal will generally be and the more templates will be required.

6. If you are given government agency-supplied worksheets and forms, you can use the Proposal Pack templates "Worksheet" and "Supplied Form" as placeholders when you assemble your Proposal Pack templates. Replace the contents of the Proposal Pack templates with the government-supplied documents.

7. If there is no match between a Proposal Pack template and the required grant information, you can copy the "Blank Template" template and add a matching page header. Alternatively, you can copy a similar Proposal Pack template and alter the page header to match the required Table of Contents items.

8. If you are responding to an RFP that requires the proposal be printed and bound with marked tab dividers, use the "Tab" template for the blank tab divider pages.

9. After you've selected your templates, assemble them in the order of your Table of Contents. If you are using the Proposal Pack Wizard, you can create a custom FileList#.ini file

including all of the Table of Contents sections and files. The Wizard will then assemble all of the proposal pages into a single document for you. There are Proposal Pack Wizard FileList12.ini file listings supplied with Proposal Pack for all of the sample government grant proposals. Look at the Sample Proposal Collection and find the sample government grants. Each of the sample government grants has the actual FileList12.ini file that was used to create the sample included. This can be found by either clicking the link in the numbered steps of the organizer page for that sample, or by browsing to the folder for that sample on your hard drive. You can edit the FileList12.ini file using any text editor.

10.   In order to use the custom FileList12.ini files you will have to turn on a couple custom features in the Wizard. In the Preferences -> Project Settings -> Configure Document Selection Screen you will have to check the box that says "Enable 'Everything' Proposal Size". Then in the "Tab on Screen" drop down list you will have to make sure the "Auto Recommendations" tab is set to "Always Display". You will have to have either "All 12 Proposal Types" or "Custom 1" selected from the Proposal Type drop down as well.

11. After you have assembled your template into a single document, fill in the blanks with the proposal content and finish editing your proposal. Because government RFPs vary so much, you will have to customize the stock Proposal Pack templates to match specific RFP requirements.

12.   Use the Grant Development Checklist template as a guide for developing the proposal.

Examples for a variety of agencies are included in the next section. Review the examples to get a better idea of how to map RFP requirements to a specific set of Proposal Pack templates.

There are tens of thousands of new government grants issued every year; there are thousands of templates included in Proposal Pack. You will have to read the RFP application instructions to determine what information is being requested. Then, familiarize yourself with the Proposal Pack templates to get an idea of what is included in Proposal Pack. Next you will pick Proposal Pack templates to match the requested information, assemble the selected Proposal Pack templates in the order appropriate for the specific RFP you are responding to, then re-title the Proposal Pack page headers and Table of Contents as needed. Finally, you will fill in the blanks of the assembled proposal with the content requested by the government grant agency.

PROPOSAL PACK WIZARD WITH COMPLEX GOVERNMENT GRANTS

There are two ways to assemble your proposal using Proposal Pack.

1. Select all your Proposal Pack documents and individually fill them out. This method may be used when multiple people are working on different chapters of the proposal. When all parties are done, the proposal can be assembled. Either combine all of the template together into a master document using your word processor to append the pages together, then use your word processor to save the proposal as a PDF document (assuming you have PDF creation capabilities installed with your word processor). Follow the RFP instructions on how to deliver your proposal: some must be uploaded to a government web site electronically in specific formats, others must be printed and delivered in a binder.

2. If you are using the Proposal Pack Wizard software along with the Proposal Pack template package, you can use the Wizard to assemble all of your documents into a single file. This assembled file is named FullProposal.docx. Then you can fill in the blanks and deliver your proposal. Follow the RFP instructions on how to deliver your proposal: some must be uploaded to a government web site electronically in specific formats, others must be printed and delivered in a binder.

Using Proposal Pack Wizard, create your proposal framework as follows:

1. Determine which Proposal Pack templates will be used for the proposal. Make sure to select templates for every single page; use the "Blank Template" for pages you don't have matching templates for. Determine your list of templates by familiarizing yourself with all of the Proposal Pack templates, reading the grant application guidelines for the information to be provided, and reviewing the sample template mappings provided in the next section of this manual.

2. We provide a custom proposal type for your use in the Proposal Pack Wizard. This is called Custom #1. Because government grants may be more complex than is easy to set up in the Proposal Pack Wizard application interface, we recommend that you manually create a mapping file by editing the FileList12.ini file with a text editor. Find the FileList12.ini file (which corresponds to the Wizard Custom #1 file). This file is found in the c:\ProposalKit\ProposalPack\Database_V# folder. Open the FileList12.ini file and add all the templates you have selected. You must make sure the files are sequenced in numerical order with no gaps in the number sequence. Following is an example for a USDA government grant. We have included the custom FileList12.ini files for all of the government grant sample proposals in the Proposal Pack Sample Proposal Collection. You can recreate any of the sample government grant proposal frameworks by copying the entire FileList12.ini file from the sample folder to the Wizard's database folder (typically found at C:\ProposalKit\ProposalPack\Database_V#).

3. After you have completed your FileList12.ini file mapping, run the Proposal Pack Wizard and go to the Preferences. In order to use the custom FileList12.ini files you will have to turn on a couple custom features in the Wizard. In the Preferences -> Project Settings -> Configure Document Selection Screen you will have to check the box that says "Enable 'Everything' Proposal Size". Then in the "Tab on Screen" drop down list you will have to make sure the "Auto Recommendations" tab is set to "Always Display". You will have to have either "All 12 Proposal Types" or "Custom 1" selected from the Proposal Type drop down as well.

4. Go to the Wizard home interface screen and add a new Project.

5. For the Proposal Type of the new project, select the name of the Custom #1 proposal type (if you have pasted in a government grant sample the proposal type in the drop down list box may start with something like the agency name such as "USDOJ ...").

6. Click the "Pick Documents" button to select the documents to use. Select the "Everything" option from the first drop-down list box named "Pick Size," then click the "Recommend" button. You will see a list of all of the templates in your FileList12.ini file. Click the OK button.

7. Fill in the company and client fields in the "Company Data" and "Client Data" screens.

8. Click OK to save the Project.

9. At the main Wizard interface screen, click the "Create Your Proposal" button to have your proposal document generated. Follow the instructions until completed.

10.   Click the "Edit Your Proposal" button to open the FullProposal.docx file.

11. Now your proposal framework is complete and ready for you to finish editing.

The first time you try using the Wizard, follow the steps above using one of the example FileList12.ini files we have created so you can understand the process. After you have done it once, then customize the FileList12.ini file to create your own mappings.

Here is an example FileList12.ini mapping from a USDA government grant and the associated Table of Contents created by the Wizard. Notice how the section headers in the FileList12.in file become group headings in the Table of Contents, followed by the templates. The rest of the proposal document is then made up of the templates all appended together. For illustration purposes, only the Table of Contents is being shown here; the actual document created by the Proposal Pack Wizard using the following FileList12.ini mapping is 63 pages long.

Example Wizard FileList12.ini mapping:

[COMMENTS]

C0=!!!!!!!!!!!!! READ COMMENTS IF MANUALLY EDITING THIS FILE !!!!!!!!!!!!!

C1=Listings below are for USDA Distance Learning and Telemedicine Program federal grant proposals

C2=If editing manually make sure file sequence numbers are unique and sequentially numbered 1,2,3, etc.

C3=If adding new documents the .docx files must be put in the same folder as the rest of the Proposal Pack word documents such as c:\proposalkit\proposalpack\classic_1_v#\documents\word

C4=Files added to SECTION_10 and SECTION_11 are NOT appended to your combined proposal document (FullProposal.docx), use these sections for files related to your project you want copied and configured for each project, just not appended to the main proposal document.

C5=CategoryHeader text is not inserted in to the proposal, this text is only used in the Wizard interface.

[SETUP]

Title=USDA Federal Grant (DLTP)

Display=1

TitlePageLogo=0

[CATEGORY_A]

CategoryHeader=Cover Documents

[SECTION_0]

SectionHeader=None

File1=Tab A,Tab.docx

File2=Form SF-424,Worksheet.docx

File3=Grant Cover,CoverSheet.docx

File4=Title Page,TitlePage.docx

File5=Table of Contents,TableContents.docx

[CATEGORY_B]

CategoryHeader=Introduction Documents

[SECTION_1]

SectionHeader=Introduction

File1=Fixed Sites,Worksheet.docx

File2=Non-Fixed Sites,Worksheet.docx

File3=Equal Opportunity Survey,Worksheet.docx

File4=Tab B,Tab.docx

File5=Legal Eligibility,LegalEligibility.docx

File6=Tab C,Tab.docx

File7=Executive Summary,ExecSummary.docx

[SECTION_2]

SectionHeader=None

[CATEGORY_C]

CategoryHeader=Project-centered Documents

[SECTION_3]

SectionHeader=Project Information

File1=Tab D,Tab.docx
File2=Project Summary,Summary.docx
File3=Tab D-1,Tab.docx
File4=Telecommunications System Plan,SystemPlan.docx
File5=Schematics,Schematics.docx
File6=Scope/Statement of Work,Statement.docx
File7=Tab D-2,Tab.docx
File8=Project Budget,Worksheet.docx
File9=In-Kind Match,Worksheet.docx
File10=Other Funds,Worksheet.docx
File11=Tab D-3,Tab.docx
File12=Financial Information,FinancialInformation.docx
File13=Sustainability,Sustainability.docx
[SECTION_4]
SectionHeader=Statement of Experience
File1=Tab D-4,Tab.docx
File2=Capabilities,Capabilities.docx
File3=Qualifications,Qualifications.docx
[SECTION_5]
SectionHeader=Objective Scoring
File1=Tab E,Tab.docx
File2=Tab E-1,Tab.docx
File3=Rurality Fixed Sites,Worksheet.docx
File4=Rurality Non-Fixed Sites,Worksheet.docx
File5=Tab E-2,Tab.docx
File6=NSLP Fixed Sites,Worksheet.docx
File7=NSLP Non-Fixed Sites,Worksheet.docx
File8=Tab E-3,Tab.docx
File9=Leveraging Worksheets,Worksheet.docx
File10=Tab E-4,Tab.docx
File11=EZ/EC,Worksheet.docx
[SECTION_6]
SectionHeader=Subjective Scoring
File1=Tab F,Tab.docx
File2=Tab F-1,Tab.docx
File3=Additional NSLP,Worksheet.docx
File4=Tab F-2,Tab.docx
File5=Needs Assessment,NeedsAssessment.docx
File6=Benefits,Benefits.docx
File7=Tab F-3,Tab.docx
File8=Innovativeness,Innovativeness.docx
File9=Tab F-4,Tab.docx

File10=Cost Effectiveness,CostEffectiveness.docx
[SECTION_7]
SectionHeader=Contact with USDA
File1=Tab G,Tab.docx
File2=State Director Letter,ContactLetter.docx
[CATEGORY_D]
CategoryHeader=Certification Documents
[SECTION_8]
SectionHeader=Certifications
File1=Tab H,Tab.docx
File2=Architectural Barriers,SuppliedForm.docx
File3=Flood Hazards,SuppliedForm.docx
File4=Uniform Relocation,SuppliedForm.docx
File5=Drug-Free Workplace,SuppliedForm.docx
File6=Debarment and Suspension Rules,SuppliedForm.docx
File7=Lobbying,SuppliedForm.docx
File8=Non-Duplication of Services,SuppliedForm.docx
File9=Environmental Impact,SuppliedForm.docx
[CATEGORY_E]
CategoryHeader=None
[SECTION_9]
SectionHeader=None
[CATEGORY_F]
CategoryHeader= None
[SECTION_10]
SectionHeader= None
[CATEGORY_G]
CategoryHeader= None
[SECTION_11]
SectionHeader= None

Example Table of Contents created by the Wizard using the Example FileList12.ini Mapping (shown in the previous section):

Table of Contents

Objective Scoring

Subjective Scoring

Contact with USDA

Certifications

PROPOSAL PACK GRANT PREPARATION CHECKLIST

See the Grant Proposal Checklist included with Proposal Pack for a checklist of items to consider during the development of your proposal. The file name is "GrantProposalChecklist.docx" and it is in the Documents/Word folder along with all the Proposal Pack templates.

You can also open this document from the Proposal Pack desktop organizer.

PROPOSAL PACK BID / NO BID EVALUATION FORM AND CHECKLIST

See the Bid / No Bid Checklist included with Proposal Pack for a checklist of items to consider when deciding whether you should bid on a particular government grant. The file name is "BidNoBidChecklist.docx" and it is in the Documents/Word folder along with all the Proposal Pack templates.

You can also open this document from the Proposal Pack desktop organizer.

RESOURCES: FEDERAL GOVERNMENT GRANT FUNDING AGENCIES

One of the primary resources for finding Federal government grants, application guidelines, and toolkits is the government web site https://www.grants.gov.

You will find information from all the major Federal agencies here.

For other types of government proposals refer to the RFP instructions you were given.

EXAMPLES OF GENERATING A PROPOSAL BASED ON THE RFP

Over 100,000 government grants, contracts and/or RFPs are issued every year, with shelf lives usually lasting only months. All have similarities in the information requested and may include some standard forms and worksheets. For the most part, however, it's up to you to actually assemble the complete proposal.

This is where Proposal Pack comes in. We provide you with the tools to respond to those RFPs and fill in the blanks with the missing materials you need.

However, you do have to do some work to read and analyze the RFP application instructions to determine what kind of information is being requested and how it must be delivered.

With so many RFPs, it is impossible for any proposal writing product to give you complete, ready-made fill-in-the-blank proposals. We would have to add 300 new RFPs a day to our product just to keep up.

We have provided you a toolkit of templates you can select and arrange in any order to create a response to any government RFP, along with instructions on how to do this efficiently.

Following are examples of exactly how this has been done for specific proposals from a variety of agencies. You will follow the same process to create your response.

Note that it took only a few hours to do the analysis and mapping process and create the complete proposal framework that you will then finish filling in with the actual content of your proposal for each example. The first time you do this will be the most time-consuming as you learn everything that is included in the Proposal Pack for Government Grants.

Notice in the following examples that the same process and set of Proposal Pack templates can be used to respond to any government RFP.

APPENDIX A: USDA EXAMPLE

The following is an example of an RFP from the US Department of Agriculture for a Distance Learning and Telemedicine grant.

An example of this complete sample proposal can be found in the Proposal Pack Sample Proposal Collection, which is included with Proposal Pack.

The first task done was to analyze the RFP and place the required information into a Table of Contents with groups of information listed under appropriate section names, as required or requested by the RFP application guidelines. Then, an appropriate collection of Proposal Pack templates was mapped to the Table of Contents items.

Note that the names of Table of Content items and template titles may be slightly different. After your mapping is done and the templates are assembled into a completed proposal, you can customize the proposal page headers to more exactly match the Table of Contents. This is one difference between writing general business proposals, where you are in complete control of the final proposal, and a government grant proposal, where the government agency has more control over exactly what information is put into the proposal and how it is titled and organized.

Note that the Proposal Pack templates "Worksheet" and "Supplied Form" are used when there is a government agency-supplied worksheet or form provided for you by the agency. These templates are used only as placeholders when assembling your proposal using Proposal Pack Wizard to allow the Wizard to generate the entire Table of Contents. Later, you will insert the actual government-supplied worksheets and forms into the proposal.

Line item in RFP Table of Contents	Proposal Pack Template to Use
Tab A	Tab
Form SF-424	Worksheet
Grant Cover	Cover Sheet
	Title Page
	Table of Contents
Introduction	
Fixed Sites	Worksheet
Non-Fixed Sites	Worksheet
Equal Opportunity Survey	Worksheet
Tab B	Tab
Legal Eligibility	Legal Eligibility
Tab C	Tab
Executive Summary	Executive Summary
Project Information	
Tab D	Tab
Project Summary	Project Summary
Tab D-1	Tab

Telecommunications System Plan	System Plan
Schematics	Schematics
Scope/Statement of Work	Statement of Work
Tab D-2	Tab
Project Budget	Worksheet
In-Kind Match	Worksheet
Other Funds	Worksheet
Tab D-3	Tab
Financial Information	Financial Information
Sustainability	Sustainability
Statement of Experience	
Tab D-4	Tab
Capabilities	Capabilities
Qualifications	Qualifications
Objective Scoring	
Tab E	Tab
Tab E-1	Tab
Rurality Fixed Sites	Worksheet
Rurality Non-Fixed Sites	Worksheet
Tab E-2	Tab
NSLP Fixed Sites	Worksheet
NSLP Non-Fixed Sites	Worksheet
Tab E-3	Tab
Leveraging Worksheets	Worksheet
Tab E-4	Tab
EZ/EC	Worksheet
Subjective Scoring	

Tab F	Tab
Tab F-1	Tab
Additional NSLP	Worksheet
Tab F-2	Tab
Needs Assessment	Needs Assessment
Benefits	Benefits
Tab F-3	Tab
Innovativeness	Innovativeness
Tab F-4	Tab
Cost Effectiveness	Cost Effectiveness
Contact with USDA	
Tab G	Tab
State Director Letter	Contact Letter
Certifications	
Tab H	Tab
Architectural Barriers	Supplied Form
Flood Hazards	Supplied Form
Uniform Relocation	Supplied Form
Drug-Free Workplace	Supplied Form
Debarment and Suspension Rules	Supplied Form
Lobbying	Supplied Form
Non-Duplication of Services	Supplied Form
Environmental Impact	Supplied Form

Next, the mapping spreadsheet was used to create a custom Proposal Pack Wizard database file called FileList12.ini. See the previous chapter on using Proposal Pack Wizard for Complex Government Grants.

[COMMENTS]

C0=!!!!!!!!!!!!! READ COMMENTS IF MANUALLY EDITING THIS FILE !!!!!!!!!!!!!!

C1=Listings below are for USDA Distance Learning and Telemedicine Program federal grant proposals

C2=If editing manually make sure file sequence numbers are unique and sequentially numbered 1,2,3, etc.

C3=If adding new documents the .docx files must be put in the same folder as the rest of the Proposal Pack word documents such as c:\proposalkit\proposalpack\classic_1_v#\documents\word

C4=Files added to SECTION_10 and SECTION_11 are NOT appended to your combined proposal document (FullProposal.docx), use these sections for files related to your project you want copied and configured for each project, just not appended to the main proposal document.

C5=CategoryHeader text is not inserted in to the proposal, this text is only used in the Wizard interface.

[SETUP]

Title=USDA Federal Grant (DLTP)

Display=1

TitlePageLogo=0

[CATEGORY_A]

CategoryHeader=Cover Documents

[SECTION_0]

SectionHeader=None

File1=Tab A,Tab.docx

File2=Form SF-424,Worksheet.docx

File3=Grant Cover,CoverSheet.docx

File4=Title Page,TitlePage.docx

File5=Table of Contents,TableContents.docx

[CATEGORY_B]

CategoryHeader=Introduction Documents

[SECTION_1]

SectionHeader=Introduction

File1=Fixed Sites,Worksheet.docx

File2=Non-Fixed Sites,Worksheet.docx

File3=Equal Opportunity Survey,Worksheet.docx

File4=Tab B,Tab.docx

File5=Legal Eligibility,LegalEligibility.docx

File6=Tab C,Tab.docx

File7=Executive Summary,ExecSummary.docx

[SECTION_2]

SectionHeader=None

[CATEGORY_C]
CategoryHeader=Project-centered Documents
[SECTION_3]
SectionHeader=Project Information
File1=Tab D,Tab.docx
File2=Project Summary,Summary.docx
File3=Tab D-1,Tab.docx
File4=Telecommunications System Plan,SystemPlan.docx
File5=Schematics,Schematics.docx
File6=Scope/Statement of Work,Statement.docx
File7=Tab D-2,Tab.docx
File8=Project Budget,Worksheet.docx
File9=In-Kind Match,Worksheet.docx
File10=Other Funds,Worksheet.docx
File11=Tab D-3,Tab.docx
File12=Financial Information,FinancialInformation.docx
File13=Sustainability,Sustainability.docx
[SECTION_4]
SectionHeader=Statement of Experience
File1=Tab D-4,Tab.docx
File2=Capabilities,Capabilities.docx
File3=Qualifications,Qualifications.docx
[SECTION_5]
SectionHeader=Objective Scoring
File1=Tab E,Tab.docx
File2=Tab E-1,Tab.docx
File3=Rurality Fixed Sites,Worksheet.docx
File4=Rurality Non-Fixed Sites,Worksheet.docx
File5=Tab E-2,Tab.docx
File6=NSLP Fixed Sites,Worksheet.docx
File7=NSLP Non-Fixed Sites,Worksheet.docx
File8=Tab E-3,Tab.docx
File9=Leveraging Worksheets,Worksheet.docx
File10=Tab E-4,Tab.docx
File11=EZ/EC,Worksheet.docx
[SECTION_6]
SectionHeader=Subjective Scoring
File1=Tab F,Tab.docx
File2=Tab F-1,Tab.docx
File3=Additional NSLP,Worksheet.docx
File4=Tab F-2,Tab.docx
File5=Needs Assessment,NeedsAssessment.docx

File6=Benefits,Benefits.docx

File7=Tab F-3,Tab.docx

File8=Innovativeness,Innovativeness.docx

File9=Tab F-4,Tab.docx

File10=Cost Effectiveness,CostEffectiveness.docx

[SECTION_7]

SectionHeader=Contact with USDA

File1=Tab G,Tab.docx

File2=State Director Letter,ContactLetter.docx

[CATEGORY_D]

CategoryHeader=Certification Documents

[SECTION_8]

SectionHeader=Certifications

File1=Tab H,Tab.docx

File2=Architectural Barriers,SuppliedForm.docx

File3=Flood Hazards,SuppliedForm.docx

File4=Uniform Relocation,SuppliedForm.docx

File5=Drug-Free Workplace,SuppliedForm.docx

File6=Debarment and Suspension Rules,SuppliedForm.docx

File7=Lobbying,SuppliedForm.docx

File8=Non-Duplication of Services,SuppliedForm.docx

File9=Environmental Impact,SuppliedForm.docx

[CATEGORY_E]

CategoryHeader=None

[SECTION_9]

SectionHeader=None

[CATEGORY_F]

CategoryHeader= None

[SECTION_10]

SectionHeader= None

[CATEGORY_G]

CategoryHeader= None

[SECTION_11]

SectionHeader= None

Finally, the Proposal Pack Wizard was used to generate the complete proposal framework document called FullProposal.docx from the FileList12.ini file above. Following is the Table of Contents created by the Wizard. The rest of the document is not included in this example. The actual proposal framework created by the Wizard is 63 pages long for this particular RFP.

Table of Contents

Statement of Experience

Objective Scoring

Subjective Scoring

Contact with USDA

Certifications

APPENDIX B: USDOJ EXAMPLE

The following is an example of an RFP from the US Department of Justice for a Court Involved Youth Intervention Project grant.

A sample of this complete example proposal can be found in the Proposal Pack Sample Proposal Collection, which is included with Proposal Pack.

The first task done was to analyze the RFP and place the required information into a Table of Contents with groups of information listed under appropriate section names as required or requested by the RFP application guidelines. Then, an appropriate collection of Proposal Pack templates was mapped to the Table of Contents items.

Note that the names of Table of Content items and template titles may be slightly different. After your mapping is done and the templates are assembled into a completed proposal, you can customize the proposal page headers to more exactly match the Table of Contents. This is one difference between writing general business proposals, where you are in complete control of the final proposal, and a government grant proposal, where the government agency has more control over exactly what information is put into the proposal and how it is titled and organized.

Note that the Proposal Pack templates "Worksheet" and "Supplied Form" are used when there is a government agency-supplied worksheet or form provided for you by the agency. These templates are used only as placeholders when assembling your

proposal using Proposal Pack Wizard to allow the Wizard to generate the entire Table of Contents. Later, you will insert the actual government-supplied worksheets and forms into the proposal.

Line item in RFP Table of Contents	Proposal Pack Template to Use
Form SF-424	Worksheet
Abstract	Cover Sheet
	Table of Contents
Problem to be Addressed	
Needs Assessment	Needs Assessment
Constituency	Constituency
Goals and Objectives	Goals and Objectives
Design	Design
Activities	Activities
Evaluation	Evaluation
Performance Requirements	Performance Requirements
Expected Results	Expected Results
Data Management	Data Management
Management and Organizational Capacity	
Project Management	Project Management
Personnel	Personnel
Financial Information (Accounting)	Financial Information
Budget	
Budget Summary	Budget
Year 1 Budget Narrative	Project Budget
Year 2 Budget Summary and Narrative	Project Budget

Year 3 Budget Summary and Justification	Project Budget
Appendices	
Resumes	Resume
Key Positions Descriptions	Key Positions
Time Line	Time Line
Coordination of Federal Efforts	Coordination

Next, the mapping spreadsheet was used to create a custom Proposal Pack Wizard database file called FileList12.ini. See the previous chapter on using Proposal Pack Wizard for Complex Government Grants.

[COMMENTS]
C0=!!!!!!!!!!!! READ COMMENTS IF MANUALLY EDITING THIS FILE !!!!!!!!!!!!!

C1=Listings below are for US Department of Education CIYI (Court Involved Youth Intervention Project Grant)

C2=If editing manually make sure file sequence numbers are unique and sequentially numbered 1,2,3, etc.

C3=If adding new documents the .docx files must be put in the same folder as the rest of the Proposal Pack word documents such as c:\proposalkit\proposalpack\classic_1_v#\documents\word

C4=There are a maximum 80 documents allowed per section, 250 total documents across all sections

C5=Altering some file names or file descriptions of existing files could cause the Wizard to not operate properly

C6=Make a backup copy of this file before manually editing

C7=Multiple copies of this file may be installed if you have installed multiple versions of the Wizard. Look in your Wizard preferences screen for the path to the folder the Wizard is looking in for the FileList#.ini database files

C8=Files added to SECTION_10 and SECTION_11 are NOT appended to your combined proposal document (FullProposal.docx), use these sections for files related to your project you want copied and configured for each project, just not appended to the main proposal document.

[SETUP]

Title=US DOJ (CIYI)

Display=1

TitlePageLogo=0

[CATEGORY_A]

CategoryHeader=Cover Documents

[SECTION_0]

SectionHeader=None

File1=Form SF-424,Worksheet.docx

File2=Abstract,CoverSheet.docx

File3=Table of Contents,TableContents.docx

[CATEGORY_B]

CategoryHeader=Problem to be Addressed

[SECTION_1]

SectionHeader=Problem to be Addressed

File1=Needs Assessment,NeedsAssessment.docx

File2=Constituency,Constituency.docx

File3=Goals and Objectives,GoalsObjectives.docx

File4=Design,Design.docx

File5=Activities,Activities.docx

File6=Evaluation,Evaluation.docx

File7=Performance Requirements,PerformanceRequirements.docx

File8=Expected Results,Results.docx

File9=Data Management,DataManagement.docx

[SECTION_2]

SectionHeader=Management and Organizational Capacity

File1=Project Management,ProjectManagement.docx

File2=Personnel,Personnel.docx

File3=Financial Information (Accounting),FinancialInformation.docx

[CATEGORY_C]

CategoryHeader=Budget

[SECTION_3]

SectionHeader=Budget

File1=Budget Summary,Budget.docx

File2=Year 1 Budget Narrative,ProjectBudget.docx

File3=Year 2 Budget Summary and Narrative,ProjectBudget.docx

File4=Year 3 Budget Summary and Justification,ProjectBudget.docx

[SECTION_4]

SectionHeader=Appendices

File1=Resumes,Resume.docx

File2=Key Positions Descriptions,KeyPositions.docx

File3=Time Line,TimeLine.docx

File4=Coordination of Federal Efforts,Coordination.docx

[SECTION_5]

SectionHeader=None

[SECTION_6]

SectionHeader=None

[SECTION_7]

SectionHeader=None

[CATEGORY_D]

```
CategoryHeader=None
[SECTION_8]
SectionHeader=None
[CATEGORY_E]
CategoryHeader=None
[SECTION_9]
SectionHeader=None
[CATEGORY_F]
CategoryHeader=None
[SECTION_10]
SectionHeader=None
[CATEGORY_G]
CategoryHeader=None
[SECTION_11]
SectionHeader=None
```

Finally, the Proposal Pack Wizard was used to generate the complete proposal framework document called FullProposal.docx from the FileList12.ini file above. Following is the Table of Contents created by the Wizard. The rest of the document is not included in this example. The actual proposal framework created by the Wizard is 30 pages long for this particular RFP.

Table of Contents

APPENDIX C: USEPA EXAMPLE

The following is an example of an RFP from the US Environmental Protection Agency for a Pollution Prevention Incentive for States grant.

A sample of this complete example proposal can be found in the Proposal Pack Sample Proposal Collection, which is included with Proposal Pack.

The first task done was to analyze the RFP and place the required information into a Table of Contents, with groups of information listed under appropriate section names as required or requested by the RFP application guidelines. Then, an appropriate collection of Proposal Pack templates was mapped to the Table of Contents items.

Note that the names of Table of Content items and template titles may be slightly different. After your mapping is done and the templates are assembled into a completed proposal, you can customize the proposal page headers to more exactly match the Table of Contents. This is one difference between writing general business proposals, where you are in complete control of the final proposal, and a government grant proposal, where the government agency has more control over exactly what information is put into the proposal and how it is titled and organized.

Note that the Proposal Pack templates "Worksheet" and "Supplied Form" are used when there is a government agency-supplied worksheet or form provided for you by the agency. These

templates are used only as placeholders when assembling your proposal using Proposal Pack Wizard to allow the Wizard to generate the entire Table of Contents. Later, you will insert the actual government-supplied worksheets and forms into the proposal.

Line item in RFP Table of Contents	Proposal Pack Template to Use
Form SF-242	Worksheet
	Table of Contents
Budget Information	Worksheet
Project Budget	Project Budget
Federal Grant Personnel	Worksheet
Federal Out-of-State Travel	Worksheet
Federal In-State Travel	Worksheet
Federal Supplies	Worksheet
Federal Contractual	Worksheet
State Match Grant Personnel	Worksheet
Project Narrative	
Project Background	Project Background
Abstract Summary	Abstract
Project Production Schedule	Production Schedule
Specification of Activities (Tasks)	Activities
Deliverables	Deliverables
Budget	
Project Budget	Project Budget
Measurement Methodologies	
Evaluation	Evaluation

Expected Results	Expected Results
Significance	Significance
National Criteria	
Partnerships	Partnerships
State Environmental Goals	Environmental
Geographic Information (Key Areas)	Geographic Information
Capabilities / Statement of Experience	Capabilities
Qualifications	Qualifications
Letter of Transmittal	Letter of Transmittal

Next, the mapping spreadsheet was used to create a custom Proposal Pack Wizard database file called FileList12.ini. See the previous chapter on using Proposal Pack Wizard for Complex Government Grants.

[COMMENTS]

C0=!!!!!!!!!!!!! READ COMMENTS IF MANUALLY EDITING THIS FILE !!!!!!!!!!!!!!

C1=Listings below are for EPA - Pollution Prevention Incentives for States

C2=If editing manually make sure file sequence numbers are unique and sequentially numbered 1,2,3, etc.

C3=If adding new documents the .docx files must be put in the same folder as the rest of the Proposal Pack word documents such as c:\proposalkit\proposalpack\classic_1_v#\documents\word

C4=There are a maximum 80 documents allowed per section, 250 total documents across all sections

C5=Altering some file names or file descriptions of existing files could cause the Wizard to not operate properly

C6=Make a backup copy of this file before manually editing

C7=Multiple copies of this file may be installed if you have installed multiple versions of the Wizard. Look in your Wizard preferences screen for the path to the folder the Wizard is looking in for the FileList#.ini database files

C8=Files added to SECTION_10 and SECTION_11 are NOT appended to your combined proposal document (FullProposal.docx), use these sections for files related to your project you want copied and configured for each project, just not appended to the main proposal document.

[SETUP]

Title=US EPA (PPIS)

Display=1

TitlePageLogo=0

[CATEGORY_A]

CategoryHeader=Cover Documents

[SECTION_0]

SectionHeader=None

File1=Form SF-242,Worksheet.docx

File2=Table of Contents,TableContents.docx

File3=Budget Information,Worksheet.docx

File4=Project Budget,ProjectBudget.docx

File5=Federal Grant Personnel,Worksheet.docx

File6=Federal Out-of-State Travel,Worksheet.docx

File7=Federal In-State Travel,Worksheet.docx

File8=Federal Supplies,Worksheet.docx

File9=Federal Contractual,Worksheet.docx

File10=State Match Grant Personnel,Worksheet.docx

[CATEGORY_B]

CategoryHeader=Project Narrative

[SECTION_1]

SectionHeader=Project Narrative
File1=Project Background,ProjectBackground.docx
File2=Abstract Summary,Abstract.docx
File3=Project Production Schedule,Schedule.docx
File4=Specification of Activities (Tasks),Activities.docx
File5=Project Deliverables,Deliverables.docx
[SECTION_2]
SectionHeader=Budget
File1=Budget,Budget.docx
[CATEGORY_C]
CategoryHeader=Measurement
[SECTION_3]
SectionHeader=Measurement Methodologies
File1=Evaluation,Evaluation.docx
File2=Expected Results,Results.docx
File3=Significance,Significance.docx
[SECTION_4]
SectionHeader=National Criteria
File1=Partnerships,Partnerships.docx
File2=State Environmental Goals,Environmental.docx
File3=Geographic Information (Key Areas),Geographic.docx
File4=Capabilities / Statement of Experience,Capabilities.docx
File5=Qualifications,Qualifications.docx
File6=Letter of Transmittal,LetterOfTransmittal.docx
[SECTION_5]
SectionHeader=None
[SECTION_6]
SectionHeader=None
[SECTION_7]
SectionHeader=None
[CATEGORY_D]
CategoryHeader=None
[SECTION_8]
SectionHeader=None
[CATEGORY_E]
CategoryHeader=None
[SECTION_9]
SectionHeader=None
[CATEGORY_F]
CategoryHeader=None
[SECTION_10]
SectionHeader=None

[CATEGORY_G]
CategoryHeader=None
[SECTION_11]
SectionHeader=None

Finally, the Proposal Pack Wizard was used to generate the complete proposal framework document called FullProposal.docx from the FileList12.ini file above. Following is the Table of Contents created by the Wizard. The rest of the document is not included in this example. The actual proposal framework created by the Wizard is 30 pages long for this particular RFP.

Table of Contents

National Criteria

APPENDIX D: USDHHS EXAMPLE

The following is an example of an RFP from the US Department of Health and Human Services for an ACF / OCS Community Economic Development Awards grant.

A sample of this complete example proposal can be found in the Proposal Pack Sample Proposal Collection, which is included with Proposal Pack.

The first task done was to analyze the RFP and place the required information into a Table of Contents, with groups of information listed under appropriate section names as required or requested by the RFP application guidelines. Then, an appropriate collection of Proposal Pack templates was mapped to the Table of Contents items.

Note that the names of Table of Content items and template titles may be slightly different. After your mapping is done and the templates are assembled into a completed proposal, you can customize the proposal page headers to more exactly match the Table of Contents. This is one difference between writing general business proposals, where you are in complete control of the final proposal, and a government grant proposal, where the government agency has more control over exactly what information is put into the proposal and how it is titled and organized.

Note that the Proposal Pack templates "Worksheet" and "Supplied Form" are used when there is a government agency-supplied worksheet or form provided for you by the agency. These

templates are used only as placeholders when assembling your proposal using Proposal Pack Wizard to allow the Wizard to generate the entire Table of Contents. Later, you will insert the actual government-supplied worksheets and forms into the proposal.

Line item in RFP Table of Contents	Proposal Pack Template to Use
Form SF-424	Worksheet
Budget	Worksheet
	Table of Contents
Narrative Budget Justification	Budget Information
Project Abstract	Abstract
Project Narrative Summary	Project Summary
Executive Summary	Executive Summary
Legal Eligibility Confirmation	Legal Eligibility
Need for Assistance - Criterion I	
Needs Assessment (Vital Community Need)	Needs Assessment
Constituency (Description of Target Population)	Constituency
Organizational Profiles & Responsibilities - Criterion II	
Company History	Company History
Personnel	Personnel
Resources	Resources
Responsibilities	Responsibilities
Project Approach (Business Plan) - Criterion III	
Executive Summary	Executive Summary
Company Operations (The Business)	Company Operations
Industry Trends	Industry Trends

Products	Products
Services Provided	Services Provided
Strategic Position	Strategic Position
Opportunities (Potential)	Opportunities
Market and Audience (Customers)	Market and Audience
Competitive Analysis	Competitive Analysis
Clients Served	Clients Served
Marketing Plan	Marketing Plan
Sales Plan	Sales Plan
Price List	Price List
Distribution	Distribution
Promotion	Promotion
Activities (Tasks)	Activities
Difficulties and Risks	Risk Analysis
Contingency Planning	Contingency Planning
Project Methods (Operations Plan)	Project Methods
Project Management Plan	Project Management
Schedule	Schedule
Overall Production Schedule	Production Schedule
Critical Risks	Risk Analysis
Assumptions	Assumptions
Benefits (to Community)	Benefits
Financial Information	Financial Information
Profit and Loss Statement	Profit and Loss Statement
Cash Flow Analysis	Cash Flow Analysis
Balance Sheet	Balance Sheet
Sources of Funds	Sources of Funds

Uses of Funds	Uses of Funds

Results or Benefits Expected - Criterion IV	
Expected Results	Expected Results
Community Empowerment	Community
Cost Summary	Cost Summary
Opportunities (Career Development)	Opportunities
Public / Private Partnerships - Criterion V	
Resource Mobilization	Resources
Integration / Coordination of Services	Coordination
Project Evaluation - Criterion VI	
Evaluation	Evaluation
Documentation Requirements (Report Formatting)	Documentation Requirements
Budget and Budget Justification - Criterion VII	
SF 424 B Assurances and Certifications	Supplied Form
Certifications	Certifications
Proof of Non-Profit Status	Tax Status
Legal Structure	Legal Structure
Appendices	
Board of Directors	Board of Directors
Board Resolution	Board Resolution
Coordination of Service Agreement (MoU)	Memorandum of Understanding
Audit Report	Report
Board Resolutions	Board Resolution
Support Letters	Support Letters
Evaluator Resume	Resume
Memorandum of Understanding	Memorandum of Understanding
Geographic Information (Map of Area)	Geographic Information

Next, the mapping spreadsheet was used to create a custom Proposal Pack Wizard database file called FileList12.ini. See the previous chapter on using Proposal Pack Wizard for Complex Government Grants.

[COMMENTS]

C0=!!!!!!!!!!!!! READ COMMENTS IF MANUALLY EDITING THIS FILE !!!!!!!!!!!!!!

C1=Listings below are for DoHHS (AFC / OCS)

C2=If editing manually make sure file sequence numbers are unique and sequentially numbered 1,2,3, etc.

C3=If adding new documents the .docx files must be put in the same folder as the rest of the Proposal Pack word documents such as c:\proposalkit\proposalpack\classic_1_v#\documents\word

C4=There are a maximum 80 documents allowed per section, 250 total documents across all sections

C5=Altering some file names or file descriptions of existing files could cause the Wizard to not operate properly

C6=Make a backup copy of this file before manually editing

C7=Multiple copies of this file may be installed if you have installed multiple versions of the Wizard. Look in your Wizard preferences screen for the path to the folder the Wizard is looking in for the FileList#.ini database files

C8=Files added to SECTION_10 and SECTION_11 are NOT appended to your combined proposal document (FullProposal.docx), use these sections for files related to your project you want copied and configured for each project, just not appended to the main proposal document.

[SETUP]

Title=US DoHHS (AFC/OCS)

Display=1

TitlePageLogo=0

[CATEGORY_A]

CategoryHeader=Cover Documents

[SECTION_0]

SectionHeader=None

File1=Form SF-424,Worksheet.docx

File2=Budget,Worksheet.docx

File3=Table of Contents,TableContents.docx

File4=Narrative Budget Justification,BudgetInformation.docx

File5=Project Abstract,Abstract.docx

File6=Project Narrative Summary,Summary.docx

File7=Executive Summary,ExecSummary.docx

File8=Legal Eligibility Confirmation,LegalEligibility.docx

[CATEGORY_B]

CategoryHeader=Need for Assistance - Criterion I

[SECTION_1]

SectionHeader=Need for Assistance - Criterion I

File1=Needs Assessment (Vital Community Need),NeedsAssessment.docx

File2=Constituency (Description of Target Population),Constituency.docx

[SECTION_2]

SectionHeader=Organizational Profiles & Responsibilities - Criterion II

File1=Company History,CompanyHistory.docx

File2=Personnel,Personnel.docx

File3=Resources,Resources.docx

File4=Responsibilities,Responsibilities.docx

[CATEGORY_C]

CategoryHeader=Project Approach (Business Plan) - Criterion III

[SECTION_3]

SectionHeader=Project Approach (Business Plan) - Criterion III

File1=Executive Summary,ExecSummary.docx

File2=Company Operations (The Business),CompanyOperations.docx

File3=Industry Trends,Industry.docx

File4=Products,Products.docx

File5=Services Provided,Services.docx

File6=Strategic Position,StrategicPosition.docx

File7=Opportunities (Potential),Opportunities.docx

File8=Market and Audience (Customers),Market.docx

File9=Competitive Analysis,Competitive.docx

File10=Clients Served,ClientsServed.docx

File11=Marketing Plan,MarketingPlan.docx

File12=Sales Plan,SalesPlan.docx

File13=Price List,PriceList.docx

File14=Distribution,Distribution.docx

File15=Promotion,Promotion.docx

File16=Activities (Tasks),Activities.docx

File17=Difficulties and Risks,Risk.docx

File18=Contingency Planning,Contingency.docx

File19=Project Methods (Operations Plan),ProjectMethods.docx

File20=Project Management Plan,ProjectManagement.docx

File21=Schedule,Schedule.docx

File22=Overall Production Schedule,Schedule.docx

File23=Critical Risks,Risk.docx

File24=Assumptions,Assumptions.docx

File25=Benefits (to Community),Benefits.docx

File26=Financial Information,FinancialInformation.docx

File27=Profit and Loss Statement,ProfitAndLossStatement.docx

File28=Cash Flow Analysis,CashFlow1.docx

File29=Balance Sheet,BalanceSheet.docx

File39=Sources of Funds,SourcesOfFunds.docx

File40=Uses of Funds,UsesOfFunds.docx

[SECTION_4]

SectionHeader=Results or Benefits Expected - Criterion IV

File1=Expected Results,Results.docx

File2=Community Empowerment,Community.docx

File3=Cost Summary,CostSummary.docx

File4=Opportunities (Career Development),Opportunities.docx

[SECTION_5]

SectionHeader=Public / Private Partnerships - Criterion V

File1=Resource Mobilization,Resources.docx

File2=Integration / Coordination of Services,Coordination.docx

[SECTION_6]

SectionHeader=Project Evaluation - Criterion VI

File1=Evaluation,Evaluation.docx

File2=Documentation Requirements (Report Formatting),Documentation.docx

[SECTION_7]

SectionHeader=Budget and Budget Justification - Criterion VII

File1=SF 424 B Assurances and Certifications,SuppliedForm.docx

File2=Certifications,Certifications.docx

File3=Proof of Non-Profit Tax Status,TaxStatus.docx

File4=Legal Structure,LegalStructure.docx

[CATEGORY_D]

CategoryHeader=Appendices

[SECTION_8]

SectionHeader=Appendices

File1=Board of Directors,BoardOfDirectors.docx

File2=Board Resolution,BoardResolution.docx

File3=Coordination of Service Agreement (MoU),Memorandum.docx

File4=Audit Report,Report.docx

File5=Board Resolutions,BoardResolution.docx

File6=Support Letters,SupportLetter.docx

File7=Evaluator Resume,Resume.docx

File8=Memorandum of Understanding,Memorandum.docx

File9=Geographic Information (Map of Area),Geographic.docx

File10=Letter from Supreme Environmental Service Company,ContactLetter.docx

[CATEGORY_E]

CategoryHeader=None

[SECTION_9]

SectionHeader=None

[CATEGORY_F]
CategoryHeader=None
[SECTION_10]
SectionHeader=None
[CATEGORY_G]
CategoryHeader=None
[SECTION_11]
SectionHeader=None

Finally, the Proposal Pack Wizard was used to generate the complete proposal framework document called FullProposal.docx from the FileList12.ini file above. Following is the Table of Contents created by the Wizard. The rest of the document is not included in this example. The actual proposal framework created by the Wizard is 79 pages long for this particular RFP.

Table of Contents

Results or Benefits Expected - Criterion IV

Public / Private Partnerships - Criterion V

Budget and Budget Justification - Criterion VII

Appendices

APPENDIX E: USDOE EXAMPLE

The following is an example of an RFP from the US Department of Education for a Fund for the Improvement of Postsecondary Education (FIPSE) grant.

A sample of this complete example proposal can be found in the Proposal Pack Sample Proposal Collection, which is included with Proposal Pack.

The first task done was to analyze the RFP and place the required information into a Table of Contents, with groups of information listed under appropriate section names as required or requested by the RFP application guidelines. Then, an appropriate collection of Proposal Pack templates was mapped to the Table of Contents items.

Note that the names of Table of Content items and template titles may be slightly different. After your mapping is done and the templates are assembled into a completed proposal, you can customize the proposal page headers to more exactly match the Table of Contents. This is one difference between writing general business proposals, where you are in complete control of the final proposal, and a government grant proposal, where the government agency has more control over exactly what information is put into the proposal and how it is titled and organized.

Note that the Proposal Pack templates "Worksheet" and "Supplied Form" are used when there is a government agency-supplied worksheet or form provided for you by the agency. These

templates are used only as placeholders when assembling your proposal using Proposal Pack Wizard to allow the Wizard to generate the entire Table of Contents. Later, you will insert the actual government-supplied worksheets and forms into the proposal.

Line item in RFP Table of Contents	Proposal Pack Template to Use
Form SF-424	Worksheet
	Table of Contents
Grant Cover	Cover Sheet
	Title Page
Project Overview	
Abstract	Abstract
Project Background	Project Background
Partnerships	Partnerships
Significance	Significance
Needs	
Needs Assessment	Needs Assessment
Project Design	
Design	Design
Activities	Activities
Time Line	Time Line
Project Methods to Realize Goals	Project Methods
Evaluation	Evaluation
Project Management	Project Management
Resources	Resources
Appendices	

Collaboration Letters	Collaboration Letters
Commitment Letters	Commitment Letters
Advisory Team Commitment Letters	Commitment Letters
Staff Resumes	Resume
External Evaluator Resume	Resume
Policies	Policies
Indirect Cost and Fringe	Worksheet
Benchmark Results (Evaluation Chart)	Benchmark Results
Credentials / Certifications	Credentials

Next, the mapping spreadsheet was used to create a custom Proposal Pack Wizard database file called FileList12.ini. See the previous chapter on using Proposal Pack Wizard for Complex Government Grants.

[COMMENTS]
C0=!!!!!!!!!!!!! READ COMMENTS IF MANUALLY EDITING THIS FILE !!!!!!!!!!!!!
C1=Listings below are for US Department of Education FIPSE
C2=If editing manually make sure file sequence numbers are unique and sequentially numbered 1,2,3, etc.
C3=If adding new documents the .docx files must be put in the same folder as the rest of the Proposal Pack word documents such as c:\proposalkit\proposalpack\classic_1_v#\documents\word
C4=There are a maximum 80 documents allowed per section, 250 total documents across all sections
C5=Altering some file names or file descriptions of existing files could cause the Wizard to not operate properly
C6=Make a backup copy of this file before manually editing
C7=Multiple copies of this file may be installed if you have installed multiple versions of the Wizard. Look in your Wizard preferences screen for the path to the folder the Wizard is looking in for the FileList#.ini database files
C8=Files added to SECTION_10 and SECTION_11 are NOT appended to your combined proposal document (FullProposal.docx), use these sections for files related to your project you want copied and configured for each project, just not appended to the main proposal document.
[SETUP]
Title=US DOE (FIPSE)
Display=1
TitlePageLogo=0

[CATEGORY_A]
CategoryHeader=Cover Documents
[SECTION_0]
SectionHeader=None
File1=Form SF-424,Worksheet.docx
File2=Table of Contents,TableContents.docx
File3=Grant Cover,CoverSheet.docx
File4=Title Page,TitlePage.docx
[CATEGORY_B]
CategoryHeader=Project Overview
[SECTION_1]
SectionHeader=Project Overview
File1=Abstract,Abstract.docx
File2=Project Background,ProjectBackground.docx
File3=Partnerships,Partnerships.docx
File4=Significance,Significance.docx
[SECTION_2]
SectionHeader=Needs
File1=Needs Assessment,NeedsAssessment.docx
[CATEGORY_C]
CategoryHeader=Project-centered Documents
[SECTION_3]
SectionHeader=Project Design
File1=Design,Design.docx
File2=Activities,Activities.docx
File3=Time Line,TimeLine.docx
File4=Project Methods to Realize Goals,ProjectMethods.docx
File5=Evaluation,Evaluation.docx
File6=Project Management,ProjectManagement.docx
File7=Resources,Resources.docx
[SECTION_4]
SectionHeader=Appendices
File1=Collaboration Letters,CollaborationLetters.docx
File2=Commitment Letters,CommitmentLetters.docx
File3=Advisory Team Commitment Letters,CommitmentLetters.docx
File4=Staff Resume,Resume.docx
File5=External Evaluator Resume,Resume.docx
File6=Policies,Policies.docx
File7=Indirect Cost and Fringe,Worksheet.docx
File8=Benchmark Results (Evaluation Chart),Benchmark.docx
File9=Credentials/Certifications,Credentials.docx
[SECTION_5]

SectionHeader=None
[SECTION_6]
SectionHeader=None
[SECTION_7]
SectionHeader=None
[CATEGORY_D]
CategoryHeader=None
[SECTION_8]
SectionHeader=None
[CATEGORY_E]
CategoryHeader=None
[SECTION_9]
SectionHeader=None
[CATEGORY_F]
CategoryHeader=None
[SECTION_10]
SectionHeader=None
[CATEGORY_G]
CategoryHeader=None
[SECTION_11]
SectionHeader=None

Finally, the Proposal Pack Wizard was used to generate the complete proposal framework document called FullProposal.docx from the FileList12.ini file above. Following is the Table of Contents created by the Wizard. The rest of the document is not included in this example. The actual proposal framework created by the Wizard is 29 pages long for this particular RFP.

Table of Contents

Appendices

APPENDIX F: USDOH EXAMPLE

The following is an example of an RFP from the US Department of Housing and Urban Development for a Support for Innovative Activities to Housing and Economic Development in Rural Areas grant.

A sample of this complete example proposal can be found in the Proposal Pack Sample Proposal Collection, which is included with Proposal Pack.

The first task done was to analyze the RFP and place the required information into a Table of Contents, with groups of information listed under appropriate section names as required or requested by the RFP application guidelines. Then, an appropriate collection of Proposal Pack templates was mapped to the Table of Contents items.

Note that the names of Table of Content items and template titles may be slightly different. After your mapping is done and the templates are assembled into a completed proposal, you can customize the proposal page headers to more exactly match the Table of Contents. This is one difference between writing general business proposals, where you are in complete control of the final proposal, and a government grant proposal, where the government agency has more control over exactly what information is put into the proposal and how it is titled and organized.

Note that the Proposal Pack templates "Worksheet" and "Supplied Form" are used when there is a government agency-supplied worksheet or form provided for you by the agency. These templates are used only as placeholders when assembling your proposal using Proposal Pack Wizard to allow the Wizard to generate the entire Table of Contents. Later, you will insert the actual government-supplied worksheets and forms into the proposal.

Line item in RFP Table of Contents	Proposal Pack Template to Use
Form SF-424	Worksheet
	Table of Contents
Federal Assistance Funding Matrix	Worksheet
Cover Letter	Cover Letter
Checklist of Forms and Certifications	Worksheet
Budget Information - Non Construction Programs	Worksheet
Assurances - Non Construction Programs	Worksheet
Program Summary	
Abstract	Abstract
Narrative Response to Factors for Award	
Rating Factor 1: Capacity and Experience / Capabilities	Capabilities
Qualifications	Qualifications
Rating Factor 2: Need and Extent of the Problem	Needs Assessment
Rating Factor 3: Soundness of Approach	Approach
Policies	Policies
Expected Results	Expected Results
Rating Factor 4: Leveraging Resources	Resources

Rating Factor 5: Comprehensiveness and Coordination	Coordination

Documentation	
Required Documentation (Area Served is Rural)	Documentation File
Required Documentation (EZ/EC)	Documentation File
Form HUD 40076-RHED Line Item Budget	Supplied Form
Certifications	Certifications
Form HUD 40076-RHED Federal Funds for Rural Housing	Supplied Form
Funds Pledged / Sources of Funds	Sources of Funds
SBA Form 147	Supplied Form
Standard Form 30 - Modification of Contract	Supplied Form
Project Budget	Project Budget
Commitment Letters	Commitment Letters

Next, the mapping spreadsheet was used to create a custom Proposal Pack Wizard database file called FileList12.ini. See the previous chapter on using Proposal Pack Wizard for Complex Government Grants.

[COMMENTS]

C0=!!!!!!!!!!!! READ COMMENTS IF MANUALLY EDITING THIS FILE !!!!!!!!!!!!!

C1=Listings below are for US Department of Housing and Urban Development

C2=If editing manually make sure file sequence numbers are unique and sequentially numbered 1,2,3, etc.

C3=If adding new documents the .docx files must be put in the same folder as the rest of the Proposal Pack word documents such as c:\proposalkit\proposalpack\classic_1_v#\documents\word

C4=There are a maximum 80 documents allowed per section, 250 total documents across all sections

C5=Altering some file names or file descriptions of existing files could cause the Wizard to not operate properly

C6=Make a backup copy of this file before manually editing

C7=Multiple copies of this file may be installed if you have installed multiple versions of the Wizard. Look in your Wizard preferences screen for the path to the folder the Wizard is looking in for the FileList#.ini database files

C8=Files added to SECTION_10 and SECTION_11 are NOT appended to your combined proposal document (FullProposal.docx), use these sections for files related to your project you want copied and configured for each project, just not appended to the main proposal document.

[SETUP]

Title=US DOH (SIAHEDRA)

Display=1

TitlePageLogo=0

[CATEGORY_A]

CategoryHeader=Cover Documents

[SECTION_0]

SectionHeader=None

File1=Form SF-424,Worksheet.docx

File2=Table of Contents,TableContents.docx

File3=Federal Assistance Funding Matrix,Worksheet.docx

File4=Grant Cover Letter,CoverLetter.docx

File5=Checklist of Forms and Certifications,Worksheet.docx

File6=Budget Information - Non Construction,Worksheet.docx

File7=Assurances - Non Construction,Worksheet.docx

[CATEGORY_B]

CategoryHeader=Program Summary

[SECTION_1]

SectionHeader=Program Summary

File1=Abstract,Abstract.docx

[SECTION_2]

SectionHeader=Narrative Response to Factors for Award

File1=Rating Factor 1 - Capacity/Capabilities,Capabilities.docx

File2=Qualifications,Qualifications.docx

File3=Rating Factor 2 - Need and Extent of the Problem,NeedsAssessment.docx

File4=Rating Factor 3 - Soundness of Approach,Approach.docx

File5=Policies,Policies.docx

File6=Expected Results,Results.docx

File7=Rating Factor 4 - Leveraging Resources,Resources.docx

File8=Rating Factor 5 - Comprehensiveness and Coordination,Coordination.docx

[CATEGORY_C]

CategoryHeader=Documentation

[SECTION_3]

SectionHeader=Documentation

File1=Required Documentation (Area Served is Rural),DocumentationFile.docx

File2=Required Documentation (EZ/EC),DocumentationFile.docx

File3=Form HUD 40076-RHED Line Item Budget,SuppliedForm.docx

File4=Certifications,Certifications.docx

File5=Form HUD 40076-RHED Federal Funds for Rural Housing,SuppliedForm.docx

File6=Funds Pledged / Sources of Funds,SourcesOfFunds.docx

File7=SBA Form 147,SuppliedForm.docx

File8=Standard Form 30 - Modification of Contract,SuppliedForm.docx

File9=Project Budget,ProjectBudget.docx

File10=Commitment Letters,CommitmentLetters.docx

[SECTION_4]

SectionHeader=None

[SECTION_5]

SectionHeader=None

[SECTION_6]

SectionHeader=None

[SECTION_7]

SectionHeader=None

[CATEGORY_D]

CategoryHeader=None

[SECTION_8]

SectionHeader=None

[CATEGORY_E]

CategoryHeader=None

[SECTION_9]

SectionHeader=None

[CATEGORY_F]

CategoryHeader=None

[SECTION_10]

SectionHeader=None
[CATEGORY_G]
CategoryHeader=None
[SECTION_11]
SectionHeader=None

Finally, the Proposal Pack Wizard was used to generate the complete proposal framework document called FullProposal.docx from the FileList12.ini file above. Following is the Table of Contents created by the Wizard. The rest of the document is not included in this example. The actual proposal framework created by the Wizard is 28 pages long for this particular RFP.

Table of Contents

Documentation