To our clients:

Thank you for hiring Grantsformation, Inc. We appreciate the opportunity to be of service to you and your team.

If we have not worked together before, you will find the information in this document to be a helpful introduction to the way we work, and a member of our team will call you to review it with you. If it's been awhile since we have worked together, please review the information on your own as some processes may have changed since our last project.

This information is meant to be an overview only. If you have any questions or need us to clarify something below, please contact
> ***Jan Johnson at 832.573.9324, jan@grantsformation.com or***
> ***Millie Rutto at 832.671.7714, millie@grantsformation.com.***

Thank you!

1. **Initial Conference Call**
   The purpose of our first meeting or conference call is to clarify application guidelines, ask and answer questions, outline the direction of the project, and get key information so we can begin drafting your budget and project narrative. This call will last anywhere from 45 to 90 minutes, depending on the level of information your team needs and how much preplanning you have already done.

2. **Invoicing/Payment**
   An invoice will be provided within one week of verbal contracting (agreement to begin work) and will be dated accordingly. Terms are net 30, meaning payment in full is expected within 30 days of the invoice date.

   Mailing address for Grantsformation is P. O. Box 388, Panama City, FL 32402.
   EIN/Tax ID # is 20-0919523.

3. **Designating a Point Person**
   We have found it expedites our work when you designate a key member of your team for this project. This is the person our team will contact when we need information, data, or clarification on project components. The Point Person will also be in charge of setting up any accounts, logon names, and passwords, if needed, to build and submit your online application. *It is important that the Point Person understand basic grant guidelines, application components, deadlines, and the scope of work agreed upon.*

   Contact will primarily take place by email, so it is important that this person be reachable every day (preferably including weekends) during our work

period and that they respond to requests for information *within 24 hours or sooner*.

4. **Scope of Work—Basic**
   Unless otherwise noted in our agreement and on our invoice, we will provide the following documents/services for each contracted project:

   a. **Project Abstract:** Typically one double-spaced page; written according to funder guidelines.

   b. **Project Narrative**: This includes all drafts, edits, revisions, etc. to your satisfaction.

   c. **Budget**: We begin with a template in Excel and include all items discussed in the initial conference call as well as some placeholder items we think you may need for the project. Your team will review the Excel template and make changes accordingly as fits your project. Checking formulas as you edit the spreadsheet ensures that the math is correct and minimizes editing/revision time. **Please check the formulas.**

      Among other information, we will need two key pieces of data to complete the budget accurately:
      1) Your organization's **indirect cost rate** (ex: 1.968%, 2.2%, 5%), the authorizing agency, and the period of authorization, and
      2) The percent to include for **benefits**, over and above the base salary for each position (ex: 15%, 20%, 22%).

   d. **Budget Narrative:** When your budget is complete, we use that document to create the Budget Narrative—a Word document that mirrors the Excel template and shows the reviewer how we arrived at each line item amount, the total for each category, the annual request, and the total project request (if a multi-year project).

   e. **Competitive Preference Priorities:** If the project includes a CPP section that must be addressed, we treat it as narrative and complete it according to the application guidelines (as a separate document or as part of the Project Narrative).

      NOTE: *This is not the ORDER of work, just the typical order of APPEARANCE in the completed application. We begin with the Budget (which is worked on throughout the contracted work period), then draft the Project Narrative, Competitive Preference Priorities, Abstract, and Budget Narrative (completed last).*

5. **Scope of Work—Extended**
   For electronic grant submissions (for example, via the grants.gov portal), there are several additional documents to be gathered, prepared, assembled, and uploaded

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for your application to be complete. We assume you would like our team to complete all attachments and upload the documents/application package and include this service in most bids. If you will be handling this in-house, please let us know.

NOTE: We distinguish between "assembling and uploading" an application and "submitting" an application. **Grantsformation, Inc. does not have the authority and does NOT take responsibility for SUBMITTING the final application to the funder on your behalf (whether online, by mail, or in person).** *That is the responsibility of the authorized person at your organization. However, we will provide support to your team to complete this, and we will walk your Point Person through the grants.gov submission process to ensure the electronic package has been received and validated.*

6. **Sharing files in Dropbox**
    We have found Dropbox to be a great (and free!) service that allows our team and yours to share documents, files, PowerPoint decks, and drafts of all application documents during the work period. Upon agreement to begin work, we will set up a Dropbox file and send an email to your team members inviting them to share the folder, which resides on the web. This folder will be named with your organization and the project name and is accessible to anyone with appropriate permissions at any time of the project period and from any Internet-connected computer. All invited team members can add, read, and review/edit files.

    As basic "housekeeping" on our end, the shared folder will be removed some time after grant submission and will reside in our archives afterward. You are welcome to make back-up copies of anything in the Dropbox folder at any time for your own archives.

7. **Communication/Correspondence**
    Although we are available to your team by telephone during regular business hours, we communicate primarily through email for convenience and ease of archiving information. **It is crucial that the Point Person on your team read and respond to email** *within 24 hours*—**sooner as deadline time nears.**

8. **Editing the Narrative**
    Grant writing is a messy process that requires the eyes and talents of many people. Our team will provide dated drafts (example: "*Johnsonville ISD GEAR UP Narrative - Draft – 07.12.18*") and request that your Point Person and his/her team review them using Microsoft Word's Track Changes feature, which will note edits and comments tracked to each reviewing team member. We ask that you edit ONE version at a time, and that you are clear which version is the latest version so we can manage version control.

    NOTE: We will create MANY drafts throughout the work period, renaming them every day with the most current date in the title. ***We do NOT expect that you will edit***

EACH draft**—only designated versions at certain points along the way as indicated or requested through email communications between our team and yours. **We will provide all team members contributing edits or comments with a copy of the grant guidelines for easy reference BEFORE they make changes to the narrative. Please support us in ensuring that they read them!

9. **Timeline and Deadline**
    We will aim to have your project complete 3-5 days before the actual funder's deadline. However, sometimes this is not possible due to a number of factors. We are always prepared to go "down to the wire" with you and will be available up until the actual deadline day and time to ensure that your application is complete and you are satisfied.

    Although we are used to the pressure of the deadline, we know that this can be a stressful time for everyone, especially team members new to the grant writing and submission process. Timely communication and edits, appropriate use of Dropbox, and extended working hours on both sides will help us meet our deadline as stress-free as possible. *It is rare that a project can be completed in an 8 am – 4 pm "regular" work day. Our team works extended hours as the deadline nears, and some members of your team should expect to do so as well if we are to co-create a high-quality product.*

    Sometimes our quest for perfection means that we revise documents up until "the last minute" as we find and correct errors. This is done in the spirit of integrity, complete work, and giving our best effort. We understand that this is what you pay for, and this is what we promise.

10. **Final Document Review/Application Submission/Confirmation**
    We will be in touch with you about this process throughout the work period and will let you know every few days which documents are complete, in progress, or not yet begun. Once we have completed all documents contracted for, we will guide you through the application review and (paper or online) submission process so you can "hit the button."

    We like to know when a project has been officially submitted to the funder. <u>Please email us the confirmation message indicating your project has been successfully uploaded, or let us know that FedEx (or UPS) has possession.</u> (It helps us sleep at night knowing our work is on its way to the funder.)

Questions or concerns? Please contact us. We appreciate your business and are committed to high-quality work, clear communication, and excellent customer service. ALWAYS let us know how we can improve on any or all of these. Thank you!   *—Jan Johnson and Millie Rutto*