

Grant Writing for Small Business — Workbook

This workbook turns the course into a working application. As you move through it you will build a qualified grant pipeline, complete your federal registrations, draft each narrative section against a real rubric, and stand up a reporting calendar. Use the templates to keep your pipeline, budget, and reporting organized in one place so nothing stalls at a deadline.

Finding Grants That Fit Your Business

Build a short, qualified pipeline of grants you can realistically win instead of a long wish list.

Exercise: Map Your Four-Tier Fit

For each of the four funding tiers, decide whether your business is a strong, weak, or no fit and write one sentence explaining why. Be honest; eliminating bad-fit tiers is the point.

- Federal (SBIR/STTR, REAP, EDA): are you for-profit, under 500 employees, and doing R&D, energy, or development work that fits? Strong, weak, or no fit and why?

- State and local: what is your state economic development site and your nearest SBDC, and what local grant types (workforce, facade, main street) might fit your address?

- Foundation: do you serve an underserved population or could you partner with a nonprofit to qualify?

- Corporate (FedEx, Comcast RISE, Amber, Hello Alice): which contests match your owner demographics, industry, or location?

Worksheet: Source Search Log

Run searches in the canonical databases from the course and record every plausible opportunity. Fill one row per opportunity you find across the portals.

Program / opportunity name

Source portal (Grants.gov, SBIR.gov, state site, Candid, Hello Alice)

Funder name

Assistance Listing / CFDA or program number

Award dollar range

Close date

Program officer / contact

Link to the official notice

Checklist: Five-Minute Eligibility Triage

- Confirmed required entity type (for-profit, nonprofit, or either) matches my business
- Confirmed geographic eligibility covers my business address
- Confirmed my stage and revenue are within any stated limits
- Confirmed the allowable use of funds covers what I actually need money for
- Identified whether a cost-share match is required and whether I can fund it
- Confirmed deadline leaves at least six weeks to write
- Archived any opportunity that failed a hard gate without second-guessing

Qualifying Your Business and Getting Registered

Complete federal registrations and assemble the document vault so you are never scrambling at a deadline.

Checklist: Federal Registration Setup

- Created a Login.gov account
- Requested and received my free Unique Entity ID (UEI) in SAM.gov
- Passed SAM.gov entity validation with legal name and address matching incorporation documents exactly
- Completed full SAM.gov registration including NAICS codes, banking, and reps and certs
- Registered on Grants.gov as an Organization Applicant
- Assigned an Authorized Organization Representative (AOR) who can submit
- Registered in any agency-specific system needed (eRA Commons, agency portal)
- Set a recurring reminder to renew SAM.gov before its 12-month expiration

Worksheet: Document Vault Inventory

Locate or create each supporting document, store it with a consistent dated filename, and record where it lives. Mark anything missing as a to-do.

Articles of incorporation / organization — location

EIN letter — location

Current business license — location and expiry

Last two years of tax returns — location

Profit and loss statement — date and location

Balance sheet — date and location

Key team bios / resumes and org chart — location

Certifications held (WOSB, SDVOSB, 8(a), HUBZone) or to pursue

W-9 and proof of insurance — location

Exercise: Reframe Your Project for the Mission

Pick one target grant and reframe your project in the funder's language using the five-step method from the course.

- Write your project plainly in one sentence: what you will do and why.

- List the funder's top three priorities in their own words from the notice and about page.

- Write one sentence per priority connecting your project to it with a number attached.

- Rewrite your project sentence so it leads with the funder's highest priority, not yours.

Writing the Winning Narrative

Draft each scored section directly against the funder's published rubric so your effort matches the points.

Worksheet: Rubric-to-Section Map

Copy the scoring criteria and point weights from your target grant's notice. For each criterion, plan where in your narrative you will earn those points.

Criterion 1 name and point value

Criterion 2 name and point value

Criterion 3 name and point value

Criterion 4 name and point value

Criterion 5 name and point value

Total points and the section addressing each criterion

Exercise: Draft the Need Statement

Write a need statement that opens with data and a citation, then localizes and connects to the funder. Use the five-step structure.

- State the problem with one number and its source (Census, Bureau of Labor Statistics, state labor data).

- Localize the problem to your specific service area, not just nationally.

- Explain why existing solutions or businesses are not meeting this need.

- Connect the problem explicitly to the funder's mission, then transition toward your project.

Worksheet: Goals, SMART Objectives, and Measurement

Define one or two goals, then write SMART objectives under each, and name the evidence that proves each objective. This feeds your logic model and evaluation section.

Goal 1 (broad change)

Objective 1.1 — specific, measurable, time-bound — and the data source that proves it

Objective 1.2 — specific, measurable, time-bound — and the data source that proves it

Goal 2 (optional)

Objective 2.1 — specific, measurable, time-bound — and the data source that proves it

Logic model note: inputs, activities, outputs, outcomes

Checklist: Editing for Score and Avoiding Killers

- Mapped each section back to the rubric and addressed every scored criterion by name
- Added headings, short paragraphs, and white space for a tired reviewer
- Replaced vague adjectives with specific numbers throughout
- Stayed within every page, character, font, and margin limit
- Included every required attachment and answered every question
- Had one outside reader check it for clarity
- Planned to submit 24 to 48 hours before the deadline

Budgets, Submission, and Managing the Award

Build a justified budget, submit cleanly, and run reporting that keeps your funds and earns renewals.

Worksheet: Line-Item Budget Justification

List each cost, tie it to an activity, and write one justification sentence per line. Make sure the total matches the award ceiling and any match is documented.

Budget category (personnel, equipment, supplies, contractual, travel, indirect)

Line item description

Linked activity / objective

Amount and how it was calculated (quote, rate, percent effort)

Justification sentence (why this cost is necessary)

Cost share / match amount and how it is documented

Exercise: Program Officer Outreach Draft

Write a short, specific email to the program officer listed in your target notice. Keep it to a few sentences and ask focused questions only.

- State who you are and your business in one sentence.
- Confirm the one or two eligibility or fit questions you genuinely need answered.
- Include a two-sentence concept summary if pre-submission inquiries are allowed.
- Close with thanks and avoid asking them to predict whether you will win.

Checklist: Clean Submission

- Completed every required form in the Workspace or agency package, not just the narrative
- Ran the built-in validation and cleared every error and warning
- Confirmed the AOR has authority and is available before the deadline
- Submitted at least a day early and saved the confirmation and tracking number
- Verified the agency accepted the package (submission and acceptance are separate)
- Saved a complete copy of everything submitted for my reusable library

Checklist: Post-Award Reporting and Renewal

- Read the award terms and conditions in full and listed every obligation
- Opened a separate ledger or account so grant spending is cleanly traceable
- Built a calendar of every financial (SF-425) and progress report with reminders two weeks ahead
- Set up real-time tracking of outcomes against promised objectives
- Confirmed record retention plan (generally three years after final report)
- Submitted the final closeout report on time
- Asked the funder about renewal or follow-on programs

Your Action Plan

1. Start your SAM.gov UEI and registration today, before you have a target grant, because it can take weeks.
2. Run searches in Grants.gov, SBIR.gov, your state economic development site, and one corporate source; log every fit in the Pipeline Tracker.
3. Triage each opportunity in five minutes and keep only those that pass every hard eligibility gate.
4. Assemble your document vault with consistent dated filenames so reusables are ready.
5. Pick your top two grants by priority score and reframe each project in the funder's mission language.
6. Copy the scoring rubric for your top grant and map every section to its point value before writing.
7. Draft the need statement, SMART objectives, and logic model, then build the line-item budget with justifications.
8. Run the editing pass against the rubric, have an outside reader check clarity, and clear every killer.
9. Submit 24 to 48 hours early, verify acceptance, and save the confirmation number.
10. Build your reporting calendar the day you are awarded and track outcomes continuously toward a clean final report and a renewal request.

