

## Step 9

# Writing the Organization Background Component

**IN ADDITION TO** the planning sections of the proposal, you need to develop a section about the organization itself. This step provides an overview of the purpose of an organization background section and of what it should contain to best establish your nonprofit's credibility. Using examples and a worksheet, you will learn how to present your organization's strengths to funders.

## Purpose of the Organization Background Statement

What are the mission, values, and other distinguishing characteristics of your organization? And why will it be able to do what it is proposing successfully? The organization background component answers these questions and more. This is the section of the proposal where you get to tell funders all about your organization (and brag a little!), which means it can get rather lengthy if you don't use some restraint. *Try to limit this proposal component to no more than three pages.* A good organization background statement describes the nonprofit well enough to assure prospective funders that this nonprofit can successfully undertake the proposed program.

Grantmakers may refer to this section as the "Introduction" or the "Applicant Description," but the same basic information is expected regardless of its name. This section of your proposal should allow the reviewer to get a strong impression that your organization

- Is fiscally secure
- Is well managed
- Provides important community services
- Understands the community it serves
- Reflects that community in its board and staff
- Has the respect of the community

## Content of the Organization Background Component

Starting with the basics, you will want to include the following:

- A description of the organization and its mission and vision, and how it came to be—its history.
- The demographics of the community your organization serves, followed by the ways in which both the board members and the staff reflect those demographics. This information is growing steadily in importance to funders, as they want to make sure that the nonprofit is in the best position to truly understand and connect with the community it says it serves.
- A description of the organization's position and role in the community. Who are the organization's collaborating partners in the community?
- A discussion of the ways the organization is unique in comparison to others providing similar services.
- Descriptions of innovative programs or special services the organization has provided. Has it received any awards or special recognition?
- A very *brief* history of funding by other sources.

Your primary goal in crafting this section of the proposal is to establish credibility with potential funders. You need to use your judgment as to what is appropriate given the specific proposal—and the funder. The guiding question should be, “What is the key information this funder needs about my organization and its qualifications to solidify the case for undertaking the proposed program?” For example, when seeking funds for a project that proposes to target outreach to recruit and work with monolingual Spanish-speaking seniors, it would be most beneficial to support the case by discussing the organization's history and experience of working with seniors and also its experience with innovative approaches to outreach to specific segments of the community if you don't have actual experience with the population the program proposes to serve; of course, if you don't, you want to clarify that. Similarly, when requesting funding for a highly technical project that makes use of new ways to engage clients via the Internet, information about the organization's past experience in web-based communications, as well as the qualifications of specific staff members who would be responsible for the project, would be critical to reinforcing your nonprofit's capacity to undertake the proposed project successfully. If you are proposing a collaborative project, you might give examples of other col-

laborative projects in which your agency has participated and also the successful outcomes derived from those collaborations.

Testimonials and statistics relating to the work of the nonprofit may be incorporated, although they should be kept at a minimum. The organization background component should be primarily an informative and interesting narrative describing the qualifications of your charity. Understand that the funder would probably prefer a summary of the highlights in the nonprofit's history that relate to the project needing funding. In this instance, don't be afraid to use bullet points to highlight items in what would otherwise become very dense narrative.

Don't eat up valuable proposal space with information on your organization's structure or specific details about board members and staff unless such detail is requested. Supporting documents, such as an organization chart and résumés of key staff, can provide this information and add credibility to your proposal, and they should be provided in the proposal's appendixes (see Step Eleven). However, some funders specify what appendixes they will—and will not accept—so you might have to incorporate this information into the background statement. Should this be the case, keep it brief. Summarize how many staff and board members your organization has and also the number of active volunteers engaged with it.

If your organization is too new to have any accomplishments, try focusing on the qualifications of the staff and board to provide some sense of credibility even as a start-up.

## Tips for Writing the Organization Background Component

Start with when and why the charity was created. Its mission statement should be front and center in the first or second paragraph. From there, move away from the philosophy of the organization and begin explaining *what it does*.

This is one of the few sections of a proposal that you can create as a boilerplate and use over and over. You may be required to tweak it here and there to highlight items of special interest to a particular funder. Otherwise, this section is fairly standard for most proposals.

Read the following Sample Organization Background Component. Then, using Worksheet 9.1A, gather the information for this section of your organization's proposal. Worksheet 9.1B offers an example. Next, write your own narrative, using the Sample Organization Background Component as a guide. Finally, review your work using the Organization Background Review Questions. You should be able to answer yes to each question.

## Sample Organization Background Component

The Some City Senior Center was established as a 501(c)(3) organization in 1994 by a group of six seniors ages 60 to 82 who wanted to create a place with activities and support services that would cater to the specific needs of seniors. We are the largest senior center in Any County, and serve more than 450 older adults each day as they participate in a variety of programs and services offered at the center. Since our inception, we have proudly served over 5,000 seniors in Any County with a variety of program and services.

The mission of our center is to help seniors improve and maintain a healthy and independent lifestyle and to maximize their quality of life, and our four-pronged purpose is as follows.

1. Promote dignity and self-esteem.
2. Foster independence and self-determination.
3. Facilitate social interaction and involvement in community life.
4. Dispel stereotypes and myths about aging.

Our center serves older adults from Some City, Valley Vista, Grove Beach, and Hill Viejo. The last three cities have the highest concentrations of low-income minority older adults in Any County. Of these three cities, Valley Vista has the largest Latino population. Its population is approximately 70% Latino, and of that Latino population, over 50% are monolingual Spanish speaking.

We operate a nonprofit multipurpose facility governed by an active 16-member volunteer board of directors (including three of the organization's founders), and we offer a wide variety of programs at our center to meet even the most discriminating—and sometimes specific—needs of those we serve. Programs offered include preventive health care and education; nutritious in-center and home-delivered meals; crisis intervention; support groups and case management; legal and insurance counseling; housing assistance; employment training and information; transportation; leisure activities; recreation; volunteerism/placement; and social services and referral information. Our multiuse facility makes us unique from the other senior centers in Any County, and allows us to play an even more vital role in our community.

We recently added a state-of-the-art computer lab where ten separate classes are offered (two each day), Monday through Friday. Older adults who specialize in computer technology volunteer as instructors for these courses. Since adding the computer lab, the Center has trained over 250 seniors in how to use a computer as well as how to access the Internet. And because these classes are fee-for-service, it has finally allowed us to solidify our six months of operating reserves. Our agency has had a clean audit for the last eight years, and our fundraising efforts have grown between 10 and 15% since adding our director of development position five years ago. Additionally, we have successfully secured Community Development Block Grants from two cities as well as county funding for three consecutive years.

Currently, over a dozen organizations regularly use the center after hours and on weekends; among them are Jazzercise, Ballroom Dancing, Senior Net computer classes, Legal Aid Society of Any County, Alcoholics Anonymous meetings, Health Access Latinos, and Families of Any County. This translates into well over 150 community meetings and events, as over 3,000 individuals use the Center every year—this is above and beyond our senior services.

## WORKSHEET 9.1A: Organization Background Exercise™



Worksheet 9.1B contains a sample completed exercise. Please use it as an example as you complete this exercise.

[Organization Name]	Accomplishments	Personnel
Location		
Legal status		
Date of founding		
Mission		
Target population		
Programs		
Partnerships		
How unique		
Special recognition		
Summary of need statement		
Financial		
Board and staff		

*Winning Grants Step by Step, Third Edition.* Copyright © 2008 by John Wiley & Sons, Inc. All rights reserved.

### WORKSHEET 9.1B: Organization Background Exercise Example

<b>Some City Senior Center</b>	<b>Accomplishments</b>	<b>Personnel</b>
<p>Location</p> <ul style="list-style-type: none"> <li>• <i>Some City, YZ (USA)</i></li> </ul> <p>Legal status</p> <ul style="list-style-type: none"> <li>• <i>501(c)(3) nonprofit, tax-exempt corporation</i></li> </ul> <p>Date of founding</p> <ul style="list-style-type: none"> <li>• <i>August 1, 1994</i></li> </ul> <p>Mission</p> <ul style="list-style-type: none"> <li>• <i>To help seniors improve and maintain a healthy and independent lifestyle and to maximize their quality of life</i></li> </ul> <p>Target population</p> <ul style="list-style-type: none"> <li>• <i>All seniors aged 60 and up living in Some City, Valley Vista, Grove Beach, and Hill Viejo</i></li> </ul> <p>Programs</p> <ul style="list-style-type: none"> <li>• <i>Preventive health care and education</i></li> <li>• <i>Nutritious in-center and home-delivered meals</i></li> <li>• <i>Crisis intervention</i></li> <li>• <i>Support groups and case management</i></li> <li>• <i>Legal and insurance counseling</i></li> <li>• <i>Housing assistance</i></li> <li>• <i>Employment training and information</i></li> <li>• <i>Transportation</i></li> <li>• <i>Leisure activities</i></li> <li>• <i>Recreation</i></li> <li>• <i>Volunteerism/placement</i></li> <li>• <i>Social services and referral information</i></li> </ul>	<ul style="list-style-type: none"> <li>• <i>450 seniors served annually regardless of their income levels and ability to pay from four cities in Any County</i></li> <li>• <i>Six months of operating reserves secured</i></li> <li>• <i>Clean annual audit for the last eight years</i></li> <li>• <i>92% satisfaction rating from our membership</i></li> <li>• <i>Awarded the Some City's Shining Star award for leading nonprofit in 2000</i></li> <li>• <i>Strategic plan completed and actively in use (2007–2010)</i></li> <li>• <i>Government funding secured at both the city and county levels</i></li> </ul>	<ul style="list-style-type: none"> <li>• <i>Active and engaged 16-member board of directors made up of a diverse group of individuals representing the communities we serve</i></li> <li>• <i>Full-time development professional</i></li> <li>• <i>Executive director with a five-year track record of success at the center</i></li> <li>• <i>Over 100 volunteers who donate well over 300 hours of service each month throughout our agency</i></li> </ul>

## WORKSHEET 9.1B: Organization Background Exercise Example (Continued)

<b>Some City Senior Center</b>	<b>Accomplishments</b>	<b>Personnel</b>
<p>Partnerships</p> <ul style="list-style-type: none"> <li>• <i>With numerous organizations that use our facility</i></li> </ul> <p>How unique</p> <ul style="list-style-type: none"> <li>• <i>The only senior center in Any County with a multiuse facility</i></li> <li>• <i>Fee-for-service computer classes specifically designed for seniors</i></li> </ul> <p>Special recognition</p> <p>Summary of need statement</p> <ul style="list-style-type: none"> <li>• <i>In a survey conducted by the Any County Long-Term Care Multilingual Senior Needs Assessment of 2005, only 3.9 of Spanish-speaking older adults surveyed in our four-city service area reported using senior centers; over 50% of the seniors in our service area live below the federal poverty level and are in need of a variety of services.</i></li> </ul> <p>Financial</p> <ul style="list-style-type: none"> <li>• <i>Clean audit for the last eight years</i></li> <li>• <i>Steady increase in fundraising revenue</i></li> <li>• <i>Six months of operating reserve</i></li> </ul> <p>Board and staff</p> <ul style="list-style-type: none"> <li>• <i>Seasoned executive director</i></li> <li>• <i>Board that is not yet fully reflective of the community it serves, but moving actively in that direction</i></li> </ul>		

*Winning Grants Step by Step, Third Edition.* Copyright © 2008 by John Wiley & Sons, Inc. All rights reserved.

## **Organization Background Review Questions**

1. Does the organization background section give the nonprofit credibility by stating its history, specific qualifications, purpose, programs, target population, total number of people served, and major accomplishments?
2. Does the background suggest sources of community support for the proposed program?
3. Does this section highlight any awards received? This can include winning government funding through a competitive process.