FREE TEMPLATE

Grant Writing Portfolio Template (Free Fillable PDF)

A fillable portfolio outline for grant writers with a selected projects table, confidentiality rules, guidance on describing results honestly and a fictional example entry.

Angel Reyes, DrPH(c), MPH, MCHES, PMP, PMI-ACP | grantwritingconsultant.com | Updated November 18, 2026

> This template is an outline for a grant writer's portfolio: a profile, services, sectors, a table of selected projects and a set of writing samples. It also sets out confidentiality rules and how to describe results honestly. A portfolio shows your work. It does not predict or promise an award for any future client.

1. Profile

Name:

Location and how to contact me:

What I do, in two or three sentences:

Training, credentials and relevant experience:

How I work with clients (process, timeline, what I need from them):

2. Services

Tick what you offer. Remove the rest from the finished portfolio.

- [ ] Funder research
- [ ] Letters of inquiry
- [ ] Foundation proposals
- [ ] Government applications
- [ ] Budgets and budget justifications
- [ ] Editing and review
- [ ] Grant reports
- [ ] Training or coaching

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Other services:

3. Sectors and funder types

Sectors I have worked in:

Kinds of funder I have written to (foundation, corporate, local, state or federal government):

Sectors I am building experience in:

4. Selected projects

Choose projects that show range and that you can talk about in detail. State every outcome as it stands, including declined and pending. A list with nothing declined is hard to believe.

Request size bands I use in this portfolio (define your own, for example small, medium and large, with the range for ea

Project and kind of client	My role	Funder type	Request size band	Outcome (awarded, declined, pending, not yet submitted)	What I can show

Words for your role

Use the one that is true.

Role	Meaning
Lead writer	I wrote most of the narrative from the client's information
Co-writer	I wrote named sections, and others wrote the rest
Editor	The client wrote the draft, and I revised it
Researcher	I found and screened funders, and did not write the proposal
Budget support	I built or checked the budget and justification

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Role	Meaning
Coordinator	I managed the timeline, attachments and submission

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5. Confidentiality rules

A proposal belongs to the client. It often holds budgets, salaries, strategy and details about the people they serve.

- Get the client's permission in writing before you show or describe their work, and keep a record of it
- Never share a client's proposal, in whole or in part, without consent, even in a private meeting
- Remove identifying details from any sample: organization and staff names, locations, funder names, exact amounts, and anything that could identify a person served
- Describe the client by kind, not by name, unless they have agreed to be named
- Check your contract. If it says the work is confidential, that rule stays in force after the project ends
- If you cannot get permission, write a fresh sample on an invented organization and label it as fictional

Permission log:

Client or project	What I asked to share	Who gave permission and when	Conditions

6. Describing results honestly

A grant is awarded to an organization for its program, its record and its fit with the funder. The writing helps, but the writer does not win the award alone.

Avoid	Say this
"I won this grant for the client"	"I was lead writer on a proposal that the funder awarded"
"I have raised" a total amount	"Proposals I worked on have been awarded", with your role stated for each
A success rate with no explanation	The number submitted, awarded, declined and pending, and over what period
Listing only awards	Listing declined and pending work as well, with what you learned
"I can get you funded"	"I cannot promise an award. Here is how I work and what I have done"

Other rules:

- Count a proposal once, and only for the part you did
- Do not claim renewals or later awards you did not work on
- Do not name a funder as a contact or reference unless that person has agreed
- Update outcomes when pending decisions arrive, whichever way they go

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My results statement, written to these rules:

7. Writing sample checklist

Three to five short samples are usually enough. Run this check for each one.

- [ ] I have written permission, or the sample is invented and labeled as fictional
- [ ] Names, places, funders, amounts and personal details are removed or changed
- [ ] It is my own writing, and my role is stated at the top
- [ ] It is a section or an excerpt, not a whole proposal
- [ ] It is free of errors and reads well without the rest of the proposal
- [ ] Together, my samples show different sections, such as a need statement, a program description and a budget justification
- [ ] Each sample has a short note: kind of client, funder type, my role and the outcome
- [ ] It is recent enough to show how I write now

8. Example entry

This example is fictional.

Project and kind of client	My role	Funder type	Request size band	Outcome (awarded, declined, pending, not yet submitted)	What I can show
After-school tutoring program for the Example Youth Learning Center, a small education nonprofit	Lead writer. The director supplied program data and the finance volunteer built the budget	Community foundation	Small	Declined on first submission. Revised with the funder's feedback and awarded the next cycle	A two-page need statement with details removed, shared with the client's written permission

Sample note to place above the excerpt: "Need statement excerpt, written by me as lead writer for a small education nonprofit. Names and figures have been changed. Shared with permission."

> **Want help with this?** The Complete Grant Architect is a free 16-week grant writing course, and you can hire a grant writer for your next proposal. Both are at subthesis.com.

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