

The Foundation Center's

Proposal Writing Basics

**Did you sign in and take a
handout packet?**

Please turn off your cell phones!

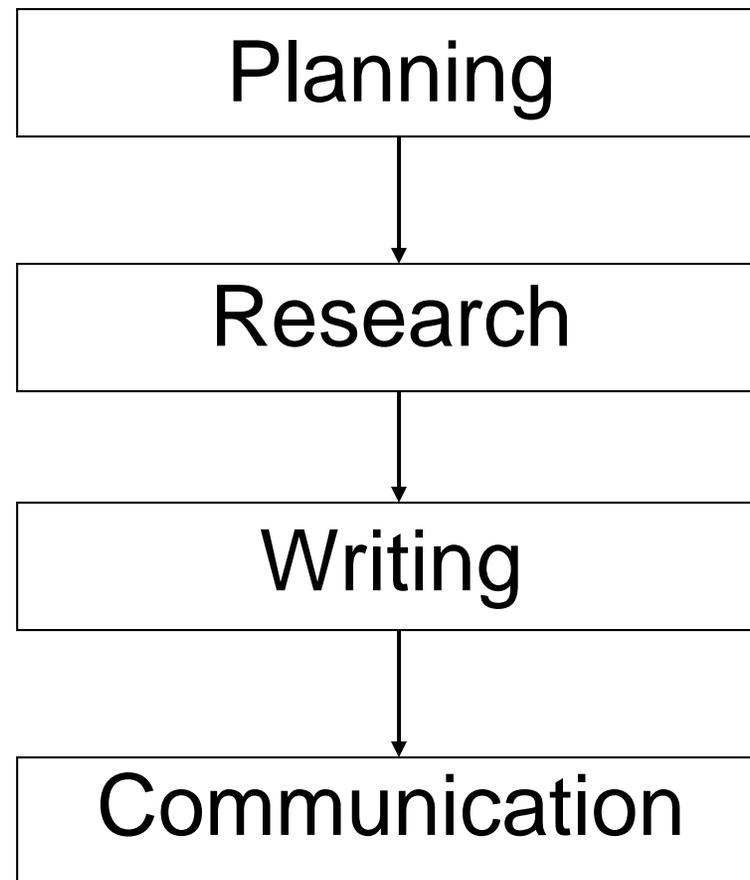


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What You Will Learn Today

- Getting started
- Preparing the proposal
 - Organizing, writing, and packaging It
- Submitting the proposal
- What happens next?

The Proposal is Part of the Process



Part 1

Getting Started

- Planning
- Researching potential funders



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Getting Started

- Are you a credible nonprofit?
- What kind of support do you need?
- Do you have enough time?

Planning

- Information gathering
- Project concept and relevance to mission
- Time frame
- Outcomes
- Cost

Researching Potential Funders

Establishing the match

- What you do: “Field of Interest”
- Where you do it: “Geographic Focus”
- Type of Support

Researching Potential Funders, continued

- Resources
 - Print directories
 - *Foundation Directory Online*
 - Grantmaker web sites
 - IRS information returns
- Foundation Center's training programs

Part 2

Preparing the Proposal

- Proposal contents
- Writing the narrative
- Packaging the proposal



Proposal Contents

- Title page and table of contents
- Executive summary – 1 page
- Narrative
 - Statement of need – 2 pages
 - Project description – 3 pages
 - Organization information – 1 page
 - Conclusion – 2 paragraphs
- Budget
- Appendices and supporting materials

The Narrative - Writing Tips

- Begin with an outline
- Name your project
- Keep language clear and simple
- Use action words
- Avoid jargon and acronyms
- Revise and edit

Statement of Need

- Problem or issue to be addressed
- Audience/community
- Supporting facts and statistics

Project Description

- Goals
- Objectives
 - S (pecific)
 - M (easurable)
 - A (chievable)
 - R (ealistic)
 - T (ime-bound)

Project Description, continued

- Methods
- Staffing
- Collaboration
- Replicability

Project Description, continued

- Evaluation
 - Formative: analyzing the process
 - Summative: measuring the outcome or product

Project Description, continued

- Sustainability
 - Is the project finite?
 - Could it move toward self-sufficiency?
 - Will it be attractive to other funders?

Budget

- Expenses
 - Direct costs
 - ✓ Personnel
 - ✓ Non-personnel
 - Indirect costs
- Income
- Budget narrative

Calculation of Overhead Rate

For example:

Program services for Prog. 1 = \$200,000

Program services for Prog. 2 = \$300,000

Total services = \$500,000

Indirect costs = \$100,000

Overhead Rate = Indirect Costs/Total Program Services

$\$100,000/\$500,000 = 20\%$

Organizational Information

- Mission and history
- Programs
- Board and staff

Conclusion

- Final appeal for your project
 - What you will accomplish
 - Why it's important
 - Who will benefit

Executive Summary

- When to write it
- What to include
 - Statement of need
 - Goals and objectives
 - Costs of the project and amount requested
 - Background on your organization

Appendices & Supporting Materials

- IRS determination letter
- Financial documents
- Board and staff
- Supporting materials

Packaging the Proposal

- Cover letter
 - Reference recent contact
 - Request for funding
 - Proposal contents
 - Offer to meet, answer questions, and provide additional information
- Proposal
- Appendices and supporting materials

Variations

- Common grant application form?
- Funder's own application form?
- Initial contact
 - Telephone call?
 - Letter of inquiry?
 - Full proposal?

Follow the funder's guidelines!

Part 3

What's Next?

- After the Proposal



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Follow-up: Building Relationships

- Telephone conversations
- Information updates
- Board contact?

The Answer is YES!

- Send a thank-you letter
- Keep the funder informed
- The renewal request

The Answer is NO!

- It's not personal
- Find out why
- Ask about future funding
- Move on; seek other prospects

Help from the Foundation Center

- Libraries including Cooperating Collection libraries
- Funding research resources
- Proposal writing courses
- FAQs on proposal writing
- Sample documents

For More Information

- Resource list is available at http://foundationcenter.org/course_materials/free_training/

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Please fill out the evaluation form
in your handout packet!

Thank you for coming!