The Foundation Center’s Training Programs

Proposal Writing Basics

Did you sign in and take a handout packet?
Please turn off your cell phones!

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

Planning
Research
Writing
Communication

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Part 1
Getting Started

• Planning
• Researching potential funders

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

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
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

- Visit the Knowledge Base section of our web site,
  http://grantspace.org/Tools/Knowledge-Base

The Foundation Center's Proposal Writing Basics

Thank you for coming!
Proposal Writing Basics

Wisdom Exchange Project Outline

<table>
<thead>
<tr>
<th>Need</th>
<th>Many students are reading below grade level</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Senior citizens are in need of meaningful work opportunities</td>
</tr>
<tr>
<td>Project Description</td>
<td>Local senior citizens tutor elementary school students in reading</td>
</tr>
<tr>
<td>Goals</td>
<td>Increase reading levels for students</td>
</tr>
<tr>
<td></td>
<td>Provide meaningful, rewarding volunteer work opportunities for seniors</td>
</tr>
<tr>
<td>Objectives</td>
<td>Recruit 20 students, grades 3 thru 6, who are below grade level in reading</td>
</tr>
<tr>
<td></td>
<td>Increase reading levels of at least 75% of the participants to their grade level in one year</td>
</tr>
<tr>
<td></td>
<td>Recruit, train, and retain at least 20 seniors as tutors for one year</td>
</tr>
<tr>
<td>Methods</td>
<td>One senior citizen will tutor one student for 2 days a week for one year</td>
</tr>
<tr>
<td></td>
<td>Tutors are trained volunteers from Madison Community Center; students are from P.S. 27</td>
</tr>
<tr>
<td>Staff Responsible</td>
<td>Project Coordinator to oversee project</td>
</tr>
<tr>
<td></td>
<td>Reading Instructor (consultant) to provide training for seniors and to be available as resource</td>
</tr>
<tr>
<td>Collaboration</td>
<td>Steering Committee will include representatives from the school administration, parents and the senior center.</td>
</tr>
<tr>
<td>Evaluation</td>
<td>A pre- and post-test to determine reading skills.</td>
</tr>
<tr>
<td></td>
<td>Student folders with progressive work samples.</td>
</tr>
<tr>
<td></td>
<td>Volunteers and staff meeting logs to evaluate and record the successful procedures and the obstacles encountered</td>
</tr>
<tr>
<td></td>
<td>A survey for volunteering seniors re: their learning experience, satisfaction, etc.</td>
</tr>
<tr>
<td>Sustainability</td>
<td>Donations will be solicited from individuals in the community</td>
</tr>
<tr>
<td></td>
<td>Future support will be sought from United Way and from local government agencies</td>
</tr>
<tr>
<td>Budget</td>
<td>Proposed Expense Budget for Wisdom Exchange Project</td>
</tr>
<tr>
<td>Executive Director</td>
<td>5% Time @ $60,000</td>
</tr>
<tr>
<td>Project Coordinator</td>
<td>1/3 FTE @$42,000/yr</td>
</tr>
<tr>
<td>Fringe</td>
<td>@20%</td>
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<tr>
<td>Personnel Cost Subtotal</td>
<td>$20,400</td>
</tr>
<tr>
<td>Consultant/Reading Spec.</td>
<td>20 days @$500/day</td>
</tr>
<tr>
<td>Consultant Cost Subtotal</td>
<td>$10,000</td>
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<tr>
<td>Supplies, reading materials</td>
<td>$ 5,000</td>
</tr>
<tr>
<td>Printing, copies</td>
<td>$ 1,000</td>
</tr>
<tr>
<td>Transportation for seniors to school</td>
<td>$ 2,000</td>
</tr>
<tr>
<td>Snacks for meetings</td>
<td>$ 1,000</td>
</tr>
<tr>
<td>Phone</td>
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<tr>
<td>Other Than Personnel Cost Subtotal</td>
<td>$10,000</td>
</tr>
<tr>
<td>Total Direct Costs</td>
<td>$40,400</td>
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<tr>
<td>Indirect Costs @15%</td>
<td>$ 6,060</td>
</tr>
<tr>
<td>Grand Total</td>
<td>$46,460</td>
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</tbody>
</table>

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