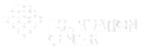


The Foundation Center's  
**Proposal Writing Basics**  
Did you sign in and take a  
handout packet?  
Please turn off your cell phones!



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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?

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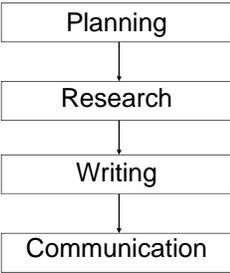
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**The Proposal is Part of the Process**



```
graph TD; A[Planning] --> B[Research]; B --> C[Writing]; C --> D[Communication];
```

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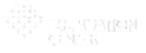
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**Part 1**  
**Getting Started**

- 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?

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**Planning**

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

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**Researching Potential Funders**

**Establishing the match**

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

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**Researching Potential Funders,**  
continued

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

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**Part 2**  
**Preparing the Proposal**

- Proposal contents
- Writing the narrative
- Packaging the proposal



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**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

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**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

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**Statement of Need**

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

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**Project Description**

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

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**Project Description, continued**

- Methods
- Staffing
- Collaboration
- Replicability

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**Project Description, continued**

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

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**Project Description, continued**

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

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**Budget**

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

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**Organizational Information**

- Mission and history
- Programs
- Board and staff

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**Conclusion**

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

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**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

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**Appendices & Supporting Materials**

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

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**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

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**Variations**

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

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*Follow the funder's guidelines!*

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**Part 3**  
**What's Next?**

- After the Proposal



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**Follow-up: Building Relationships**

- Telephone conversations
- Information updates
- Board contact?

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**The Answer is YES!**

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

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**The Answer is NO!**

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

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**Help from the Foundation Center**

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

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**For More Information**

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

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The Foundation Center's  
**Proposal Writing Basics**

Thank you for coming!



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## Proposal Writing Basics

# Wisdom Exchange Project Outline

<b>Need</b>	<ul style="list-style-type: none"> <li>◆ Many students are reading below grade level</li> <li>◆ Senior citizens are in need of meaningful work opportunities</li> </ul>																																																						
<b>Project Description</b>	<ul style="list-style-type: none"> <li>◆ Local senior citizens tutor elementary school students in reading</li> </ul>																																																						
<b>Goals</b>	<ul style="list-style-type: none"> <li>◆ Increase reading levels for students</li> <li>◆ Provide meaningful, rewarding volunteer work opportunities for seniors</li> </ul>																																																						
<b>Objectives</b>	<ul style="list-style-type: none"> <li>◆ Recruit 20 students, grades 3 thru 6, who are below grade level in reading</li> <li>◆ Increase reading levels of at least 75% of the participants to their grade level in one year</li> <li>◆ Recruit, train, and retain at least 20 seniors as tutors for one year</li> </ul>																																																						
<b>Methods</b>	<ul style="list-style-type: none"> <li>◆ One senior citizen will tutor one student for 2 days a week for one year</li> <li>◆ Tutors are trained volunteers from Madison Community Center; students are from P.S. 27</li> </ul>																																																						
<b>Staff Responsible</b>	<ul style="list-style-type: none"> <li>◆ Project Coordinator to oversee project</li> <li>◆ Reading Instructor (consultant) to provide training for seniors and to be available as resource</li> </ul>																																																						
<b>Collaboration</b>	<ul style="list-style-type: none"> <li>◆ Steering Committee will include representatives from the school administration, parents and the senior center.</li> </ul>																																																						
<b>Evaluation</b>	<ul style="list-style-type: none"> <li>◆ A pre- and post-test to determine reading skills.</li> <li>◆ Student folders with progressive work samples.</li> <li>◆ Volunteers and staff meeting logs to evaluate and record the successful procedures and the obstacles encountered</li> <li>◆ A survey for volunteering seniors re: their learning experience, satisfaction, etc.</li> </ul>																																																						
<b>Sustainability</b>	<ul style="list-style-type: none"> <li>◆ Donations will be solicited from individuals in the community</li> <li>◆ Future support will be sought from United Way and from local government agencies</li> </ul>																																																						
<b>Budget</b>	<b>Proposed Expense Budget for Wisdom Exchange Project</b>																																																						
	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 60%;">Executive Director</td> <td style="width: 30%;">5% Time @ \$60,000</td> <td style="width: 10%; text-align: right;">\$ 3,000</td> </tr> <tr> <td>Project Coordinator</td> <td>1/3 FTE @\$42,000/yr</td> <td style="text-align: right;">\$14,000</td> </tr> <tr> <td>Fringe</td> <td>@20%</td> <td style="text-align: right;">\$ 3,400</td> </tr> <tr> <td colspan="2"><b>Personnel Cost Subtotal</b></td> <td style="text-align: right;"><b>\$20,400</b></td> </tr> <tr> <td colspan="3"> </td> </tr> <tr> <td>Consultant/Reading Spec.</td> <td>20 days @\$500/day</td> <td style="text-align: right;">\$10,000</td> </tr> <tr> <td colspan="2"><b>Consultant Cost Subtotal</b></td> <td style="text-align: right;"><b>\$10,000</b></td> </tr> <tr> <td colspan="3"> </td> </tr> <tr> <td>Supplies, reading materials</td> <td></td> <td style="text-align: right;">\$ 5,000</td> </tr> <tr> <td>Printing, copies</td> <td></td> <td style="text-align: right;">\$ 1,000</td> </tr> <tr> <td>Transportation for seniors to school</td> <td></td> <td style="text-align: right;">\$ 2,000</td> </tr> <tr> <td>Snacks for meetings</td> <td></td> <td style="text-align: right;">\$ 1,000</td> </tr> <tr> <td>Phone</td> <td></td> <td style="text-align: right;">\$ 1,000</td> </tr> <tr> <td colspan="2"><b>Other Than Personnel Cost Subtotal</b></td> <td style="text-align: right;"><b>\$10,000</b></td> </tr> <tr> <td colspan="2"><b>Total Direct Costs</b></td> <td style="text-align: right;"><b>\$40,400</b></td> </tr> <tr> <td colspan="2"><b>Indirect Costs @15%</b></td> <td style="text-align: right;"><b>\$ 6,060</b></td> </tr> <tr> <td colspan="2"> </td> <td> </td> </tr> <tr> <td colspan="2"><b>Grand Total</b></td> <td style="text-align: right;"><b>\$46,460</b></td> </tr> </table>	Executive Director	5% Time @ \$60,000	\$ 3,000	Project Coordinator	1/3 FTE @\$42,000/yr	\$14,000	Fringe	@20%	\$ 3,400	<b>Personnel Cost Subtotal</b>		<b>\$20,400</b>				Consultant/Reading Spec.	20 days @\$500/day	\$10,000	<b>Consultant Cost Subtotal</b>		<b>\$10,000</b>				Supplies, reading materials		\$ 5,000	Printing, copies		\$ 1,000	Transportation for seniors to school		\$ 2,000	Snacks for meetings		\$ 1,000	Phone		\$ 1,000	<b>Other Than Personnel Cost Subtotal</b>		<b>\$10,000</b>	<b>Total Direct Costs</b>		<b>\$40,400</b>	<b>Indirect Costs @15%</b>		<b>\$ 6,060</b>				<b>Grand Total</b>		<b>\$46,460</b>
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