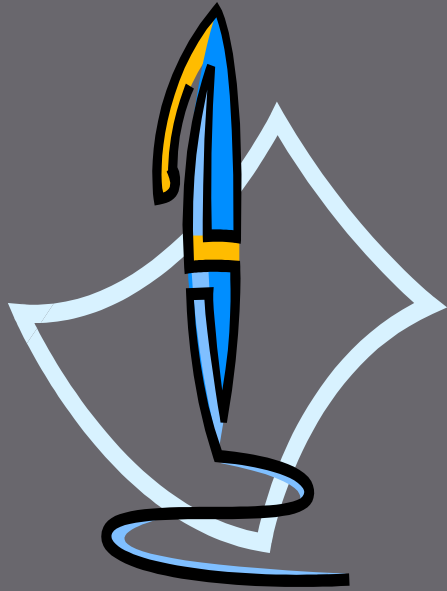


A MODEL BUILT ON FAITH



AMBOF Fund Development Series

Successful Proposal Writing

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Fund Development Comes From Multiple Sources

- ❑ **Self-Generated Fees for Service**
- ❑ **Corporate Philanthropy** (Good corporate citizens. Good for new programs, special programs, special events.
- ❑ **Federal, State and Local Governments.** Education and human services.
- ❑ **Federated Funds – United Way, United Arts – large steady amounts of money.**
- ❑ **Grantmaking Public Charities.**
- ❑ **Foundations.**
- ❑ **Family Foundations**
- ❑ **Community Foundations and Other**



Top 10 Bay Area Foundations (Giving)

1. **Silicon Valley Fdn - \$109m**
2. **David and Lucille Packard Fdn - \$76m**
3. **William and Flora Hewlett Fdn - \$62m**
4. **San Francisco Fdn - \$54m**
5. **Gordon and Betty Moore Fdn - \$14m**
6. **Marin Community Fdn - \$40m**
7. **James Irvine Fdn - \$34m**
8. **Wayne and Gladys Valley Fdn - \$26m**
9. **Evelyn and Walter Haas, Jr. Fund - \$25m**
10. **East Bay Community Fdn - \$24m**

4 Keys to Successful Grant-making

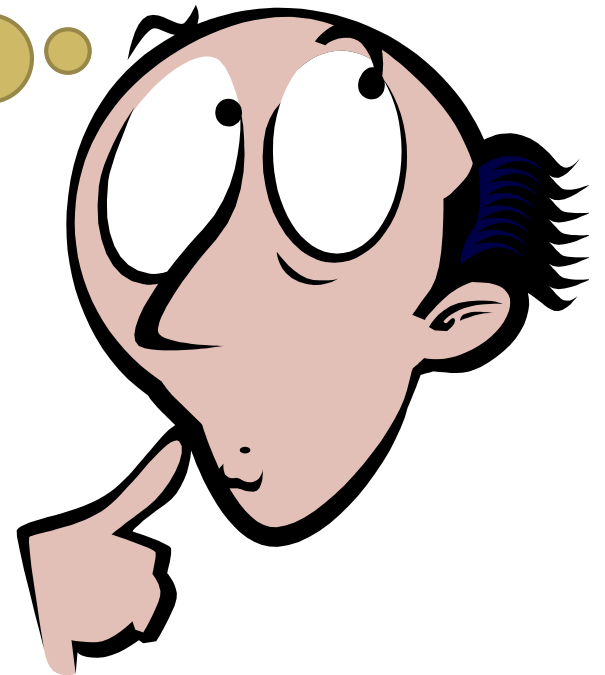
- Developing a Clear Program Plan
- Researching Funders Thoroughly
- Targeting Your Proposals Carefully to the **RIGHT** Funder
- Writing a Clear, Concise, and Compelling Proposal



It's About Making the Most a Compelling Case

Think about it...

Someone
will get the money
Why not you?



IN THE BEGINNING
THERE WAS A NEED...

THEN A VISION,
THEN A MISSION,
THEN A STRATEGY,
THEN A PROGRAM PLAN,
THEN A PROPOSAL.

Winning the Grant

Pure and Simple

```
graph TD; A[Step 1. Create a Clear Program Plan Based on the Need] --> B[Step 2. Research Funders Thoroughly, Targeting your Proposals Carefully]; B --> C[Step 3. Write, a Clear, Concise Proposal based on Funder Guidelines]; C --> D[Step 4. Submit to Funder];
```

**Step 1. Create a Clear Program Plan
Based on the Need**

**Step 2. Research Funders Thoroughly,
Targeting your Proposals Carefully**

**Step 3. Write, a Clear, Concise Proposal based
on Funder Guidelines**

Step 4. Submit to Funder

Step Write the Proposal

Proposal Components (*Long Format*)

9. Cover Letter

8. Executive Summary

7. Introduction

6. Agency Description and Qualifications (Archive?)

1. Need Statement – Evidence Based/Solid Data

3. Objectives/Ties to Evaluation

2. Program Description/Methods

4. Budget

5. Future Funding

The Need...

- What specific problem exists? Where?
- What data/evidence/statistics do you have this is a problem? (Source?)
- Because of this problem – What is the **need(s)**?
- Who has this need?
- What are the community benefits if the **need** is met?
- What are the consequences of not meeting the **need**?

The Need Statement...

- ❑ **State the need using hard-core statistics, not assumptions or undocumented assertions.**
- ❑ **Use statistics that support your argument.**
- ❑ **Make sure your data collection is well documented. (Source?)**
- ❑ **Use touching stories of real people as examples.**
- ❑ **Focus your explanation of the need on the geographic area you serve.**

YOUR TURN - DISCUSSION

- ❑ **What specific problem(s) do you see that you will address?**
- ❑ **Where does this exist?**
- ❑ **Because of this problem – What is the need(s)?**
- ❑ **What are the community benefits if the need is met?**
- ❑ **What are the consequences of not meeting the need in your community?**

Step 1. Develop a Clear Program Plan

Begin with Goals

- A Goal is a broad statement, **not** usually in measurable terms, which describes how you will meet the **need**.



To Design Your Program, Develop Measurable Objectives

- An Objective is a “sub-goal.”
- It defines a short-term, measurable step that is moving toward achieving a goal.



What is an Objective?

- **Stated in measurable terms**
- **A program can have several objectives.**
- **The objectives should work together to have the effect of achieving the overall program goal.**



Objectives Must Be S.M.A.R.T.

S



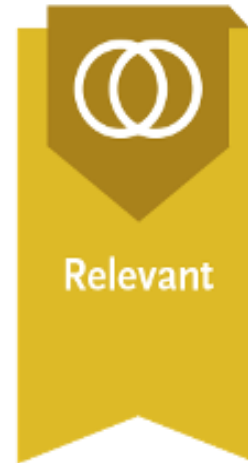
M



A



R



T





Tip for Defining Program Objectives



- Make a list of things that must be achieved to meet your program goal(s).
- Rewrite each item in the form of a SMART Objective.
- Review all of the Objectives and adjust them to achieve a balance between them.

Methodology describes activities that will meet the objectives

Example:

Goal – the goal of the Meals Consortium is to enable homebound frail elders to live independently with dignity in their own homes.

Objective 1 – to increase social services referrals and follow up for 75% of individuals served by the program in 2017.

Methodology – **1.** hire a program coordinator and **2.** outreach coordinator for this population.

YOUR TURN

- **Goals and Objectives Worksheet**

Evaluation or *“Well, Did You Do It?”*

A Good Evaluation Will Include:

- ❑ Whether the objectives were met and impact made
- ❑ Feedback from the target group
- ❑ Description of the data collection methods and analysis
- ❑ Description of how reports will be reported
- ❑ Describe how evaluation results will modify/improve programs.

Step 2. Research Funders Thoroughly

- **Understand the terminology**
- **Define What you do using their terminology**
- **Prepare List of Good Prospects – Bid/No Bid**
- **Narrow list to Best Matches**

Step 2. Research Funders Thoroughly

- **By Subject**
- **Population**
- **Organization**
- **Type Transaction**
- **Support Strategy**
- **Geography**

YOUR TURN

- **Funder Research Exercise**
- **Taxonomy/Classification**
- **Bid/No Bid Analysis**

Step 3. Write, a Clear, Concise Proposal based on Funder Guidelines

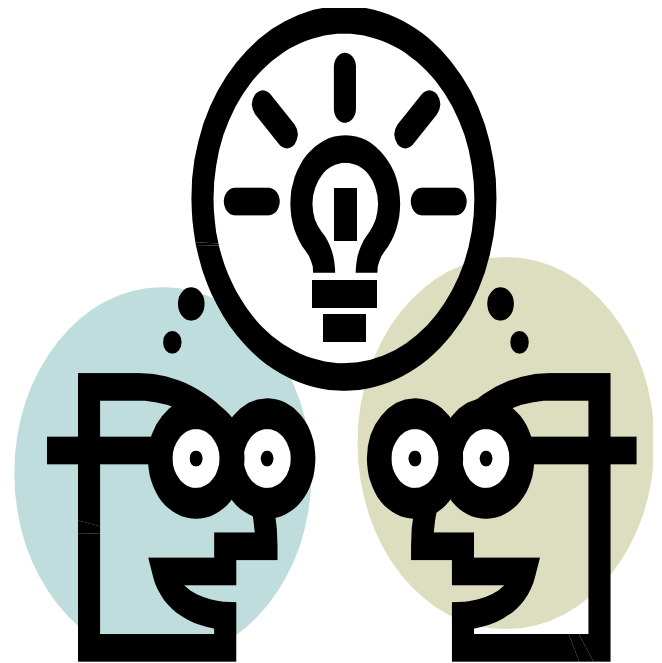
Types of Proposals

- Letter of Intent or Letter of Inquiry**
- Letter Proposal**
- Long Proposal Format (Develop Master Proposal)**
- Online Form**

Writing the Proposal:

Clear, Concise and Compelling

- **Clear** – Write clearly understandably, and with a logical flow problem to the solution.



Writing the Proposal:

Clear, Concise and Compelling

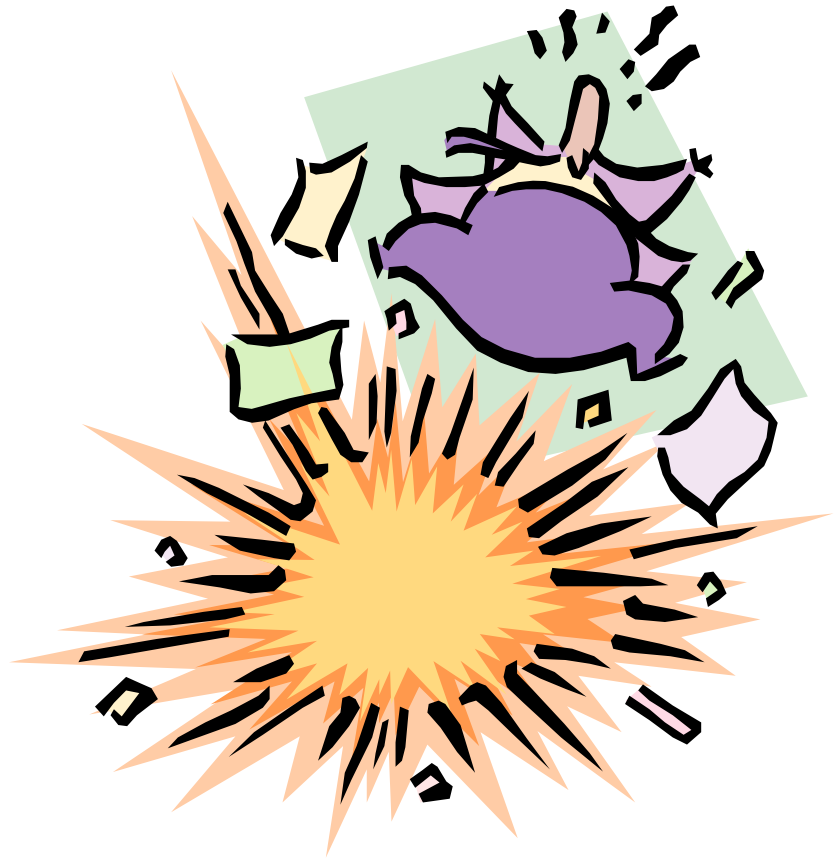
- **Concise** – Write as succinctly as possible. Readers usually have multiple proposals. *Too much* will get a skim. *Too little* may be tossed.



Writing the Proposal: Clear, Concise and Compelling

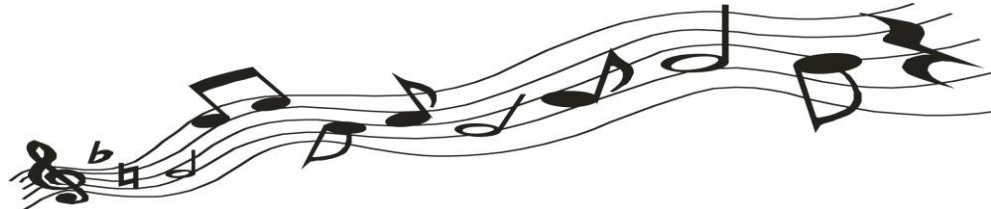
□ **Compelling...**

Make a strong case about the broad impact of your program or research. Funders want the best bang for their buck!



Budget Elements

- **Must tie to program**
- **Go back through the proposal and tie in relevant personnel and non-personnel expenses**
- **Include new costs and ongoing expenses**
- **A budget narrative may be needed to explain budget items.**
- **May ask for future funding – *How Will You Keep the Music Playing?***



Step 4. Submit to Funder

Follow-up

- Call contact person within 2 weeks
- Prepare for site visit, if required
- Keep funder informed of status of other \$\$\$
- Acknowledge grant promptly
- Determine Proper recognition of the grant
- Keep the relationship *ALIVE!*

THE READER'S EYE

- **Overview of What Funders
Want to See**

Key Resources

Foundation Center

<http://fdncenter.org//>

The Grantsmanship Center

<http://www.tgci.com/>