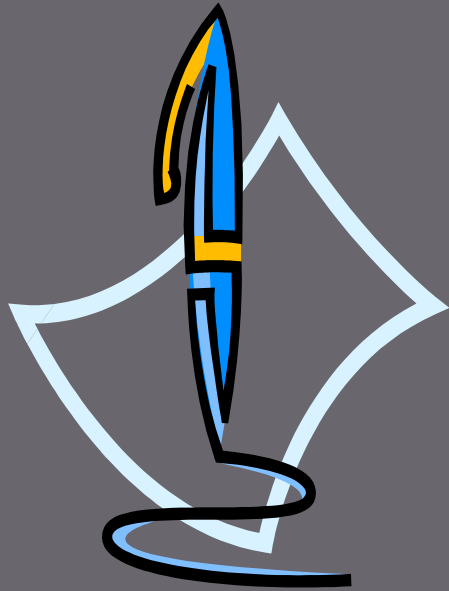


# *A MODEL BUILT ON FAITH*

## Elements of Successful Proposal Writing



### Part I

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# Bay Area Foundations Today

- **2498** – Number of Bay Area Grantmaking Foundations (2009)
- **\$45 Billion** - Total Assets of Bay Area Foundations
- **Education** – Top ranked funded field.
- **76%** - Increase in BA foundations in last ten years.



# 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**

# Bottom Line...

- Foundations are required to pay out a percentage of their assets out each year to ensure that their vision for communities is realized.
- Your program helps them realize that vision.
- They Need Partners – to do the work!



# Bottom Line...

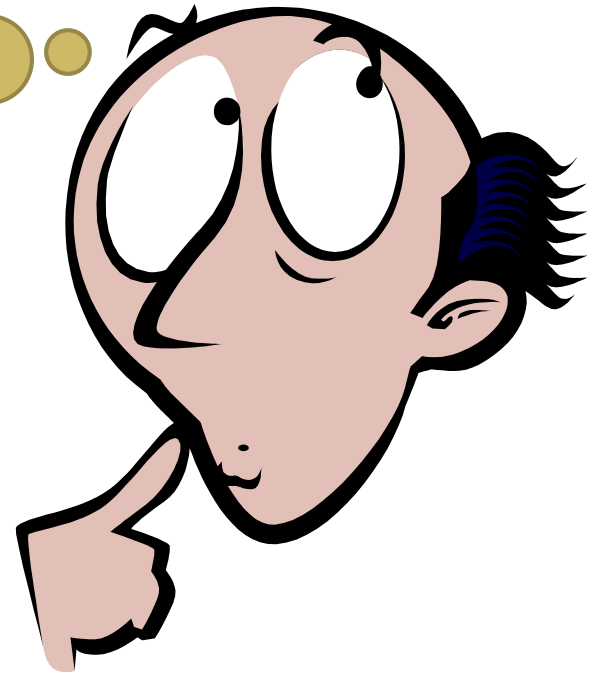
- Funds *Are* available
- Through written *And* verbal communications, convince the funder that you can make the desired impact
- Your presentation must be professional and convincing
- “Nonprofit” doesn’t mean “Non-competitive”



# It's About Competition

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.



# The Need...

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



# Proposal Process Overview – Pure and Simple

**Step 1. Develop a Clear Program Plan**



**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 1. Develop a “Clear” Program Plan

## FUNDERS WANT

- **Programs that are Research Based – Stay on top of the research for your cause in your field**
- **Matching Resources – Many nonprofits find that lack of match is a key impediment.**
- **Other funders or diversified funding base.**
- **Collaboration**
- **Sustainability**

# Step 1. Develop a “Clear” Program Plan

- ❑ **Unduplicated**
- ❑ **Well-designed – logically flowing from *Mission***
- ❑ **Solid/Well managed**
- ❑ **Realistic Goals – Smart Objectives**
- ❑ **Strong Evaluation**
- ❑ **Realistic Budgets**
- ❑ **Well-documented**

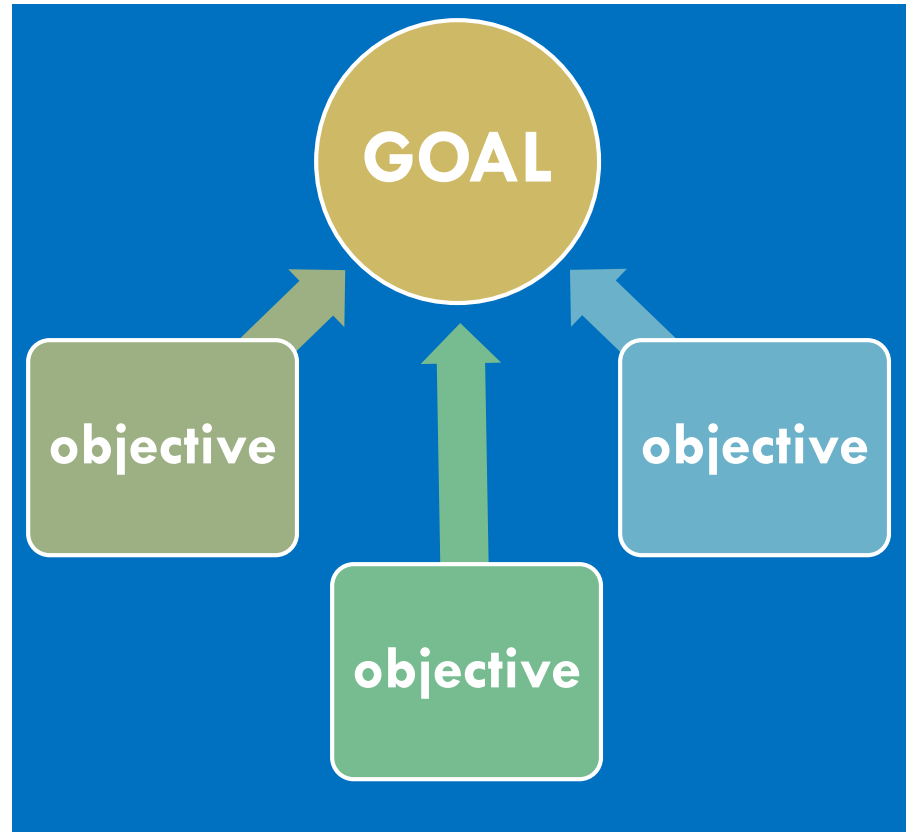
# What is a Goal?

- A Program Goal is a broad statement, *not* usually in measurable terms, which describes the *end* toward which all objectives are directed.



# What is an Objective?

- 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 several objectives.**
- **Together, the objectives should work together to have the effect of achieving the overall program goal.**



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

S



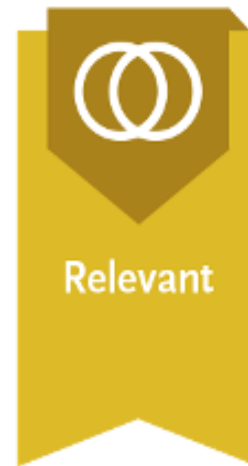
M



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.



# 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**

## **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**

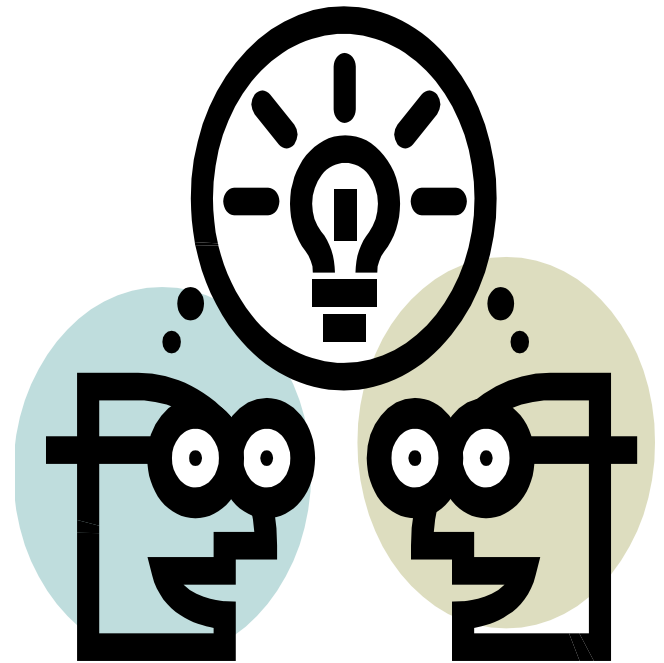
# Overview

## 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

# 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

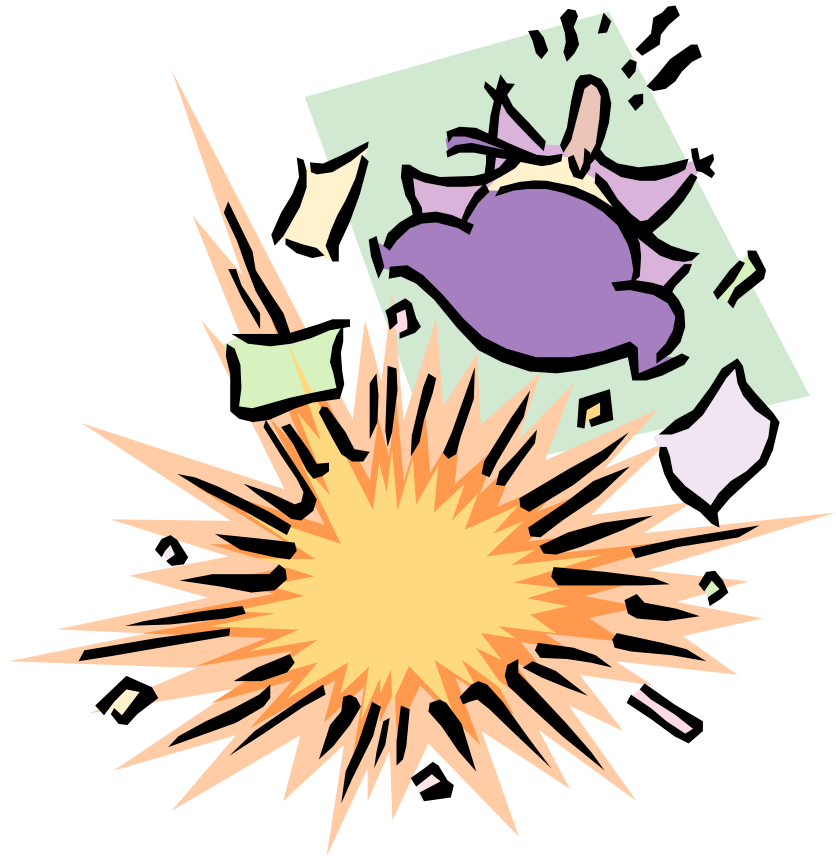
- **Concise** – Write as succinctly as possible. Readers usually have multiple proposals. *Too much* will get a skim. *Too little* may be tossed.



# 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!





# Proposal Components

## Introduction

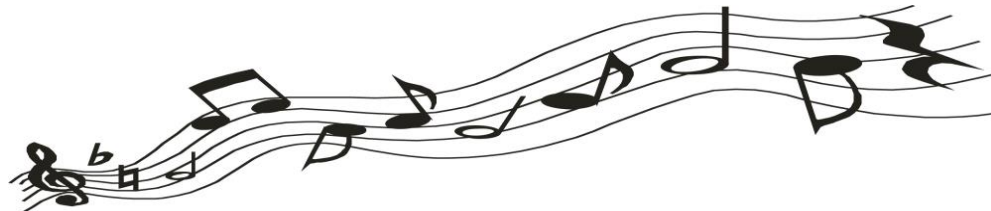
- Provides context. The beginning of the story. Ties together problem, and agency description and qualifications.

## Answers the Question:

- Why You? And
- Why are you the ONE TO DO IT?

# 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!*

# Key Resources

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## **Foundation Center**

**<http://fdncenter.org//>**

## **The Grantsmanship Center**

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