Introduction to Proposal Writing
Upon completion of this training, you should be able to:

— List the basic elements of a proposal
— Draft a standard project proposal
— Identify next steps for submitting a grant proposal
— Follow up with funders after submitting a proposal
The writing process
Proposal writing process steps

Planning 
What do you need the money for?

Research 
Who will you approach?

Writing 
How to put it all together?

Follow up 
What to do once the decision has been made?

Tip: Always follow the funders’ guidelines
Formatting

Many grantmakers use online formats
Typical proposal elements

– Executive Summary
– Narrative
– Statement of Need
– Project Description
– Organization Information
– Conclusion
– Budget
– Supporting Materials
What funders really want to know
What specific need are you addressing?

**Tip:** Make sure it fits the size and scale of your solution.
What are you trying to achieve?

**Tip:** Your outcomes must be measurable
What are your strategies for making it happen?

Tip: Think of your proposal as an organizing plan.
How do you know if you’re successful?

— Specify program objectives in measurable terms
— Identify key indicators of success
— Outline data collection and analysis activities
— Develop a timeline to monitor the success of the program
Why are you the best organization to do this work?
How will the project sustain itself in the long run?
Nonprofit profiles on GuideStar

• Many foundations review for due diligence
• Goes beyond IRS data
• Information from nonprofits themselves, 990s, and other 3rd party sources
The Seals of Transparency

- **Provide basic information to make sure donors find you**
- **Share program(s) information and brand details to guide funding decisions**
- **Upload your financial details, board chair name, and leadership demographics to gain trust and support**
- **Share your strategic plan, progress, and results to highlight your impact and boost your funding**

Candid.
Candid data partner network

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3 easy steps to claim and update

Step 1
Claim your profile
Request access to your organization's profile

Step 2
Get approved
We verify your affiliation and approve your access

Step 3
Tell your story
Showcase your programs and your impact to fast-track your funding
Claiming your profile: First, sign in or create an account
Or we won’t know who you are.
Next, click “Get started now”

Update your GuideStar Nonprofit Profile

Grow your online identity

You have the power to choose what tens of millions of people see about your organization each year. Take advantage of your free profile and share up-to-date information.

Get started now
Have questions? Go to our Help Center

— Go to help.guidestar.org for

• Guides on how to claim your profile
• Guides for how to earn a Seal
Conclusion

Tailor it to speak to this particular funder’s guidelines and interests
Executive summary

How do I reduce everything to one page?
Supporting materials

— Follow the funder’s guidelines
— Include everything they ask for
  (and very little of anything else)
— For online applications, it’s ok to add links where possible
How to follow up
Follow up: If the answer is yes

— Keep the funder informed
— Be responsive
— Do what you said you were going to do
Follow up: If the answer is no

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

— Start with an outline
— Keep the language clear and concise
— Focus on the funders’ interests
— Follow the funders’ guidelines
— Revise and edit before submitting
**Exercise**
Create a project outline

<table>
<thead>
<tr>
<th>Organization name:</th>
<th>The Project Description includes information from Goals, Objectives, Methods, Staffing, Partnerships, Evaluation, and Sustainability.</th>
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<tbody>
<tr>
<td>Project name:</td>
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<tr>
<td>Project time period:</td>
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<tr>
<td>Need</td>
<td>(Explaining why your project is necessary)</td>
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<table>
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<th>Goals</th>
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<th>Objectives</th>
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Questions?
Speaker and moderators

Title, Organization
Pronouns: List pronouns

Title, Organization
Pronouns: List pronouns

Title, Organization
Pronouns: List pronouns
What’s next

Live, in-person and online
Introduction to Project Budgets
bit.ly/IntroProjectBudgets

Self-paced eLearning
Online Proposal Writing Course
bit.ly/OnlineProposalWritingCourse
How did we do?

Your feedback is important to us! Please take a moment to fill out our course survey:

bit.ly/----------------------
Thank you

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Introduction to proposal writing

The proposal writing process

**Plan:** What do you need the money for?

**Research:** Who will you approach?

**Write:** How will you put it all together?

**Follow up:** What will you do once the decision has been made?

**Research**

Find the right fit with Foundation Directory Online (FDO)

Visit fdo.org to learn more!

Many proposals focus on what’s in it for the organization. Few pay attention to what’s in it for the funder. A grant proposal should be viewed as a win/win proposition.

**Typical proposal elements include a blueprint with:**

- Executive summary
- Narrative
  - Statement of need
  - Project description
  - Organization information
  - Conclusion
- Budget
- Supporting materials

**Executive summary**

The executive summary is one of the most important parts of the proposal. The reviewer will often read it first to determine if they want to continue reading the rest of the proposal.

- Statement of need
- Goals and objectives
- Background on your organization
- Costs of the project and amount requested

**Key takeaways**

- Start with an outline
- Keep the language clear and concise
- Focus on the funders’ interests
- Follow the funders’ guidelines
- Revise and edit before submitting

How does what you do fit with the funder’s interests?

Even though the executive summary comes first, you should write it last.

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What do funders really want to know?

What specific need are you addressing?
• What audience and community are you serving?
• What evidence do you have to support your need?

What are you trying to achieve?
• What are your goals and objectives? (think S.M.A.R.T.)

What is your strategy for making this happen?
• What is your specific plan of action?

How will you know if you are successful?
• Specify program objectives in measurable terms
• Identify key indicators of success
• Outline data collection and analysis activities
• Develop a timeline to monitor the success of the program on an ongoing basis

Why are you the best organization to do this work?
• Mission and History
• Programs
• Leadership
• Accomplishments

How will this project sustain itself in the long run?
• How will your project move toward self-sufficiency in the future?
• How will this project sustain itself without foundation support?

Conclusion:
The final appeal for your project

Make it compelling. Tailor it to speak to THIS particular funder’s guidelines and interests.

Next steps
Check out these other Candid Learning classes:
• Introduction to Fundraising Planning
• Introduction to Finding Grants
• Introduction to Project Budgets
• Proposal Writing Workshop
• Proposal Writing Boot Camp

Follow up
If the answer is YES
• Send a thank you letter
• Keep the funder informed
• Be responsive
• Do what you said you were going to do

If the answer is NO
• It’s not personal
• Find out why
• Ask about future funding
• Move on; seek other prospects

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# Proposal project outline sample

**Organization name:** After School Central  
**Project name:** Wisdom Exchange Program  
**Project time period:** September–June

## Need  
(Explaining why your project is necessary)

- Many students are reading below grade level at PS 111  
- Supporting Facts or Statistics: Standardized test results for reading in our district. Comparison with surrounding schools demonstrating that the reading scores at PS 111 are low.  
- Senior citizens are in need of meaningful volunteer work opportunities  
- Supporting Facts or Statistics: Quote from Surgeon General regarding correlation with seniors who volunteer and higher quality of life.

## Project description

The Project description includes information from Goals, Objectives, Methods, Staffing, Partnerships, Evaluation, and Sustainability.

### Goals

- Increase reading levels for students  
- Provide meaningful, rewarding, volunteer work for seniors

### Objectives

- Recruit 20 students, grades 3 thru 6, who are below grade level in reading  
- Increase reading levels of at least 75% of student participants to their grade level  
- Recruit, train, and retain at least 20 seniors as tutors for one year

### Methods

- One senior citizen will tutor one student for 2 days a week for one year  
- Tutors are trained volunteers from Madison Community Center and Centro Senior Center; students are from PS 111

### Staffing

- Project Coordinator to oversee project  
- Reading Instructor (consultant) to provide training for seniors. Remains available as a resource throughout the project. Assists in the evaluation of the program.

### Partnerships

- Madison Community Center  
- Centro Senior Center  
- PS 111 School administration  
- PS 111 PTA

### Evaluation

- A pre- and post-test to determine reading skills  
- Student folders with progressive work samples  
- Volunteers and staff meeting logs to evaluate and record the successful procedures and the obstacles encountered  
- A survey for volunteering seniors regarding their learning experience, satisfaction, etc.

### Sustainability

- Donations will be solicited from individuals in the community  
- Future support will be sought from United Way and from local government agencies
## Proposal project outline worksheet

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### Need
(Explaining why your project is necessary)

### Project description
The Project description includes information from Goals, Objectives, Methods, Staffing, Partnerships, Evaluation, and Sustainability.

### Goals

### Objectives
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