

PROPOSAL WRITING 101
WRITING PROPOSALS FOR FUNDING
SUCCESS

Richard M. Wizansky, Ed.D.

Instructor

INTRODUCTIONS

Who Are We?

WORKSHOP GOALS

Become familiar with the art and science of fundraising

Learn new proposal writing techniques

Gain confidence in the ability to persuade

Gain increased understanding of the proposal writing process

Learn and practice steps to guarantee success of the proposal before and after it is submitted

COURSE COMPONENTS

The Art and Science of Fundraising

Foundation Fundraising

The Proposal



FUNDRAISING: ART AND SCIENCE



THE SCIENCE: WHO AND WHAT



Develop a systematic approach for foundation management.

Know which foundations and foundation staff to engage and how to engage them:

Discover

Prioritize

Engage

USE SCIENCE BASED TOOLS

Set monetary goals for annual foundation revenue

Identify prospects

Create proposal calendar

Access all available foundation information resources and websites

Review annual reports of organizations similar to yours

SCIENCE BASED TOOLS (CONTINUED)

Develop foundation communications plan

Develop internal communications plan that connects proposal writers to program, finance and executive staff

DEVELOP AN INTENTIONAL STRATEGY

- Be familiar with your organization's strategic plan, programs, constituents, staffing, finances and Board governance
- Collect and analyze organizational measurable data to discover, prioritize and engage foundation staff
- Collect foundation data such as news stories, large gifts, funding/sponsorship announcements such as those you hear on NPR



THE ART: WHY AND HOW

Create an emotional connection between the foundation staff and the cause:

Create the case

Express passion

Build relationships

Tell stories

Be authentic

Make the proposal

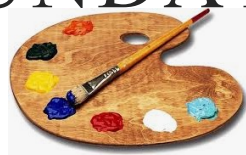
Transform



Build relationships with foundations who are aligned with your organization's mission and programs and have the highest capacity and interest to give. Inspire foundation staff with compelling stories and documented impact.

Create reciprocal relationships based on common values and trust.

WIZANSKY'S BASIC PRINCIPLES FOR FOUNDATION FUNDRAISING SUCCESS:



ART AND SCIENCE



Foundations are staffed by people

People give to people

People do not give unless asked

Fundraising is about relationships and relationship building

Meetings! Meetings! Meetings! Meetings!

Successful fundraising requires persistence and more persistence



FUNDRAISING SUCCESS (CONTINUED)

When asking for a gift, you are not asking something for yourself

Giving is both transactional and transformational

Giving is emotional

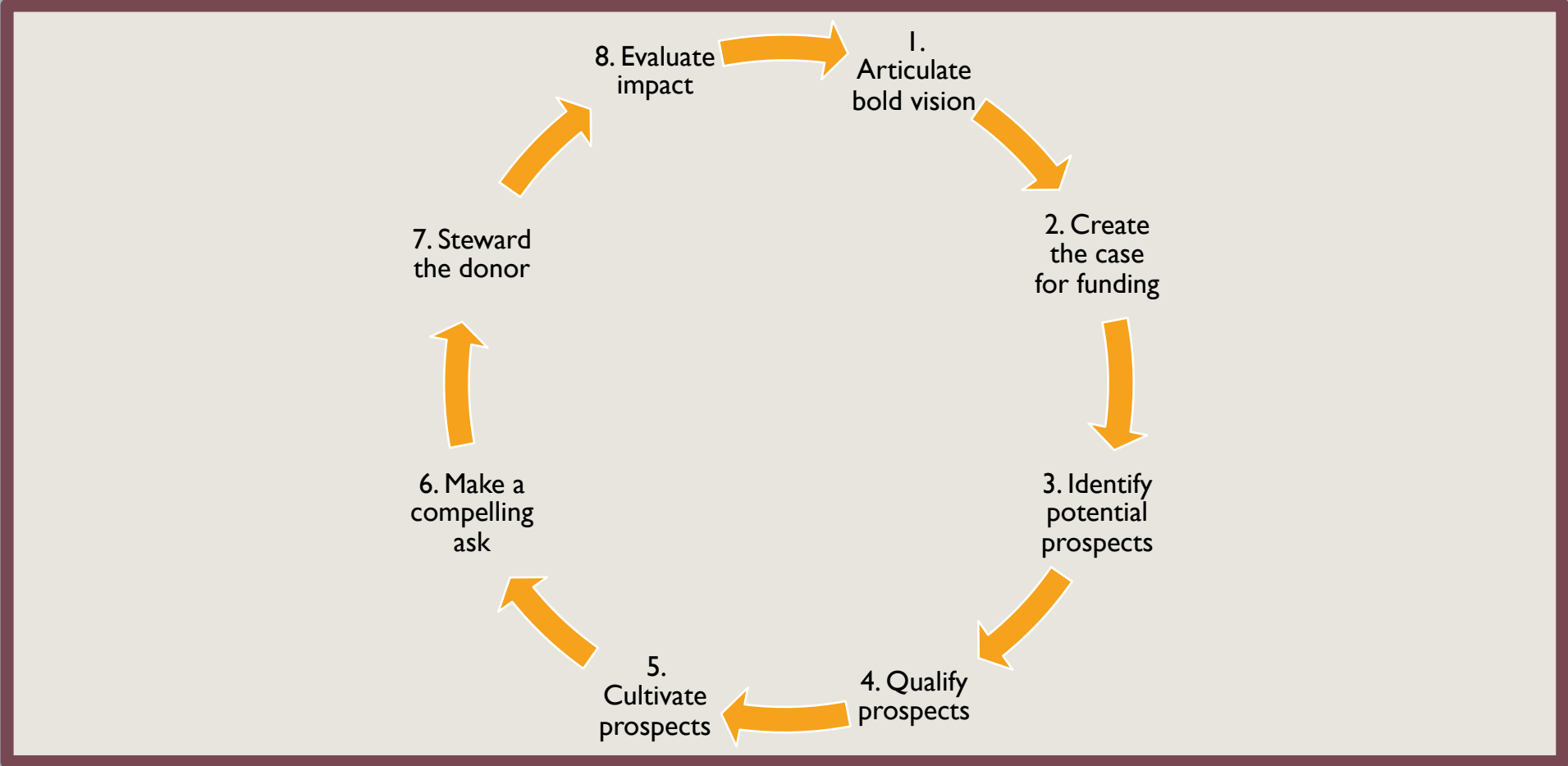
Fundraising is about **listening**

Fundraising requires authenticity

The anatomy of obtaining gifts requires “moves management”



EIGHT BOLD MOVES



GIVING USA STATS

2020: \$471.44B in Giving

Giving by
Individuals
\$324.10 billion
69% +2.2%
Increased 2.2 percent over 2019.

Giving by
Foundations
\$86.55 billion
19% +17.1%
rose 17.1 percent higher than in 2019.

Giving by
Bequest
\$41.91 billion
9% +33.3%
Increased 33.3 percent over 2019.

Giving by
Corporations
\$43.88 billion
4% + 6.5%
declined 1.1 percent from 2019.



FOUNDATION FUNDRAISING

THE PLAN

Create a foundation fundraising plan that identifies foundations which you wish to approach, the project or program you seek funding for, the support strategy, amount of request and deadlines for each foundation.

COMPATIBILITY



Be sure your program/project is compatible with each foundation's giving priorities, including focus areas, geography, types of support provided and not provided, grant amounts and what the foundation will not support.

FOUNDATIONS HAVE STRICT PRIORITIES



Understand that these priorities do not change because of the worthiness of your program/project.

DEADLINES!!

Know the foundations' LOI and full proposal submission deadlines.



SCHMOOZE



Send a list of the names of the foundations' staffs and boards to determine if your board, staff, donors or allies know someone at the foundation to which you want to send a proposal.

WHO'S IN CHARGE?

Identify the correct person at each foundation with whom to communicate.

MEET! MEET! MEET!

Call or email that person to schedule a meeting before sending a proposal.

PERSISTENCE PAYS OFF!

Remember that using persistence to obtain meetings very often pays off and that the “schmoozed” proposal has a much better chance of obtaining a grant than an anonymous one.



BYE, BYE PROPOSAL



Think twice before sending proposals “in the dark.”

THE PROPOSAL IN CONTEXT

The proposal does not stand alone

It is a component of a thoughtful strategy

RESEARCH THE FOUNDATION

The strategy is a step-by-step process which utilizes art and science to obtain the grant:

Research

Face to face meeting or Zoom or phone call

Writing the proposal

Developing the budget

Developing the evaluation plan

Additional cultivation

Composing the report



RESEARCH YOUR ORGANIZATION

The project

Expected outcomes

Evaluation

Timetable

Staffing

Expenses

Overhead

Board/staff connections to the funder

MS. JEANNE WALSH
FOUNDATION CENTER RESOURCES



THE PROPOSAL

PROPOSAL COMPONENTS

Executive Summary

Statement of Need

Project Description

Budget

Organizational information

Conclusion

EXECUTIVE SUMMARY

Summarizes all the information in the proposal:

The Organization

The Need

The Project

The Ask

The Warrior Connection (TWC) seeks a grant in the amount of \$100,000 from the Generous Foundation to further test and demonstrate the efficacy of its successful model for the treatment of PTSD in veterans and to replicate it in five communities nationwide. Funds will be used to design and deliver the treatment model in five communities and evaluate its efficacy in each site and overall, including implementation and testing of an evaluation tool that will be integrated into all TWC services and events.

DESCRIBE YOUR ORGANIZATION

Its mission

Its vision

How long it's been in existence

The Warrior Connection is a nonprofit, non-stigmatizing, primary prevention initiative designed to use the expressive arts and mindfulness to strengthen and support returning veterans and their families.

Since 2009, the mission of TWC is to promote the emotional and social health of veterans and their families within their communities.

THE STATEMENT OF NEED

The need is not about your organization's needs

It is about the social, economic, cultural, environmental, etc. need for which your organization's project will address remedies

The evidence of need should be articulated using:

Statistics

Surveys

Demographic studies

Needs assessments conducted by your organization or outside studies

Accurate, up-to-date data are essential

Present the need in the context of the solutions your organization's project offers

THE STATEMENT OF NEED (CONTINUED)

Approximately 150,000 of our nation's veterans are homeless. Approximately 300,000 veterans of the Iraq and Afghanistan wars – nearly 20% of the returning forces – are likely to suffer from either PTSD or major depression, and these numbers continue to climb. An additional 320,000 of the returning veterans from Iraq and Afghanistan may have experienced traumatic brain injuries during deployment.

THE PROJECT DESCRIPTION

Objectives

Methods

Staffing/administration

Evaluation

Sustainability

SMART GOALS AND OBJECTIVES

Strategic

Measurable

Achievable

Replicable

Time sensitive

SMART GOALS AND OBJECTIVES

(CONTINUED)

The overarching goal of the pilot project is to design, implement and further evaluate the success of TWC retreats in selected communities nationwide. To that end, TWC will:

Identify five new communities to deliver TWC retreats

Identify “visionaries” in each community who will guide and facilitate the successful commencement and completion of the retreat

Train clinical and veteran mentor staff who will facilitate the retreats

Provide staff training and retreat curriculum manuals to each site

Provide on-site oversight and expert advice at each site

BREAK OUT GROUP ASSIGNMENT

- 1) Identify a project goal and write three SMART objectives for it
- 2) For the same project, identify 3 methods of evaluation

METHODS

Describe how, when and why the objectives will be achieved

Articulate the objectives as doable

TWC has tested and refined the treatment model and curricula so that it is ready to be utilized in communities nationwide. To facilitate replication, TWC has developed seven steps that individuals, communities and agencies can use to adapt the TWC model to treat veterans and their families.

STAFFING /ADMINISTRATION

Number of staff

Qualifications

Specific staff activities

Facilitators play a vital role in the retreat regimen. A team comprised of a trained veteran and a clinician facilitates each retreat. All facilitators participate in the same training and certification programs to provide the highest level of competency and excellence to implement retreats for small groups of veterans.

EVALUATION



Build an evaluation plan into the project

Tie the plan to the project objectives

Report on the measurable outcomes

Distinguish whether the evaluation is of product-end result or process-ongoing activities or both

Use quantitative and qualitative data

Detail the impact

EVALUATION (CONTINUED)

Evaluation will be ongoing for the life of the program. The evaluation plan includes four stages of assessment designed to inform continuous program development for efficacy and effectiveness, and to collect data for correlational analysis. Data is triangulated using quantitative and qualitative methods. The questionnaire already used by The Warrior's Journey includes two assessment tools. The first is the PTSD Checklist – Military Version (PCL-M) with 17 items. This assessment tool is commonly administered by the military. The PCL-M will continue to be included in its entirety so that results can be compared with at least two prominent studies.

SUSTAINABILITY

What is the long-term viability of the project and your organization?

Be specific about current and projected funding streams

Articulate plans for growth

Veterans, clinicians, and researchers are calling out for help. The National Academy of Sciences, The American Art Therapy Association, the International Society for Traumatic Stress Studies and others recognize the urgent need for multi-disciplinary collaboration to develop more evidence of longitudinally and comprehensively effective treatments of Combat PTSD and other combat-induced ailments.

\$ THE EXPENSE BUDGET \$

- Make a list of all personnel and nonpersonnel items related to the project
- For project budgets, indicate the expenses that the foundation's grant will cover and be sure that the foundation's guidelines will cover them
- Make sure to include overhead/indirect costs which may show up in line items that are not budgeted as overhead costs
- Form a friendly, creative relationship with the individual in your organization responsible for budgets and work closely with that individual
- Keep worksheets that show how you arrived at the numbers in the budget
- Indicate the amount of foundation support requested for each line item
- Include a budget narrative for line items that need additional explanation

\$ REVENUE BUDGET \$

A project revenue budget is not usually required because the expense budget represents the amount of grant support requested

If the project has received support, itemize the grant support and other income

Then deduct that from the total expenses line on the expense budget

This will give you the amount to be raised on the expense budget

PROJECT BUDGET

Personnel	
Sarah Smith, Stewardship Director, 25%	\$11,250
George Jones, Outreach Coordinator, 25%	8,750
Mellisa Staples, Administrative Assistant, 20%	5,000
Subtotal Salaries	25,000
Benefits (30% of Salaries)	7,500
Total Personnel	\$32,500

Nonpersonnel	
Consultant: Harry Fournier, Facilitator (50 hours)	\$5,000
Technical Assistance (Helpful Federal Agency, in-kind contribution)	5,000
Printing/Audiovisual	4,500
Travel, Meetings, Conferences	4,000
Telephone, Fax, Internet Access, Web Page	3,500
Supplies	1,500
Postage	800
Total Nonpersonnel	\$24,300
Total Direct Expenses	\$56,800
Indirect Expenses (18% of Direct Expenses)	\$10,224
TOTAL EXPENSES	\$67,024

PROJECT BUDGET (CONTINUED)

INCOME	
Committed Funds	
Standish Family Foundation	\$10,000
Mansfield Trust	5,000
Helpful Federal Agency (in-kind contribution of technical assistance)	5,000
Total Committed	\$20,000
Pending Proposals and Letters of Inquiry	
Good Works Foundation	\$15,000
Morris Foundation (joint proposal with Excellent Land Trust)	10,000
Total Pending	\$25,000

Planned Proposals and Solicitations	
Salem Family Fund	\$10,000
Tuesday Foundation	5,000
Individual Contributions from Effective Land Trust Supporters	7,024
Total Planned	\$22,024
TOTAL COMMITTED, PENDING & PLANNED	\$67,024

THE CONCLUSION

Summarize the request and the project

Summarize the impact and outcomes of the project

Make the final appeal with passion

THE CONCLUSION (CONTINUED)

The Warrior Connection and its Warrior's Journey retreats demonstrate that art-based therapy, led by veteran mentors and clinicians, can offer long-term relief and can support long-term growth through the process of meaning reconstruction for trauma and loss. Retreats conducted in Vermont in 2010 and 2011 testify that the "Warrior's Journey Integration Process" is a valuable, welcomed tool in the currently impoverished arsenal of PTSD and moral injury treatments for veterans. It is essential that the work of The Warrior Connection continue so that its treatment model can be further tested and shared. A grant in the amount of \$100,000 from the Generous Foundation will assist TWC to demonstrate and evaluate the efficacy of this vital treatment modality and significantly benefit and heal veterans, their families and communities nationwide.

WRITING HINTS

TIPS!

Use impact vocabulary

Connect sentences and ideas together with “hooks”

Connect the introduction, body and conclusion with “hooks”

Use strong transitional words and sentences

Give your voice authority

Use concise sentences

Avoid jargon

NEXT VERY IMPORTANT STEPS

Get a meeting

Use stakeholders to make contact

Follow up with phone call

The proposal needs help!

Diminish your anonymity

GOOD LUCK!

AND THANK YOU...