

Proposal Writing Basics

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The Fund Raising School

Lilly Family School of Philanthropy at IUPUI



IUPUI THE FUND RAISING SCHOOL
LILLY FAMILY SCHOOL OF PHILANTHROPY

Types of Funders

Private/Independent Foundations

Family Foundations

Operating Foundations

Corporate Foundations

Public Foundations/Public Charities

Community Foundations

Government Agencies

Other Funders

Fraternal Organizations

Churches

Clubs

Professional Societies

Types of Funding

Grants

Traditional format

Donor Advised Funds (DAF)

Endowment

Corporate

Government

Other funding mechanism trends

Loans

Investments

Earned income/social enterprise



Grant or Sponsorship

GRANTS

Partnership is important

Operative in nature

Driven by shared missions

Duration is often 1 to 3 **years**

Requires reporting on deliverables

- Interim and/or final reports
- Focused on outcomes, objectives, financials

Purpose

- Enhances/supports mission
- Provides net revenue



SPONSORSHIPS

Visibility is important

Transactional in nature

Driven by marketing

Duration is often "**day of**"

Often no required reporting on deliverables

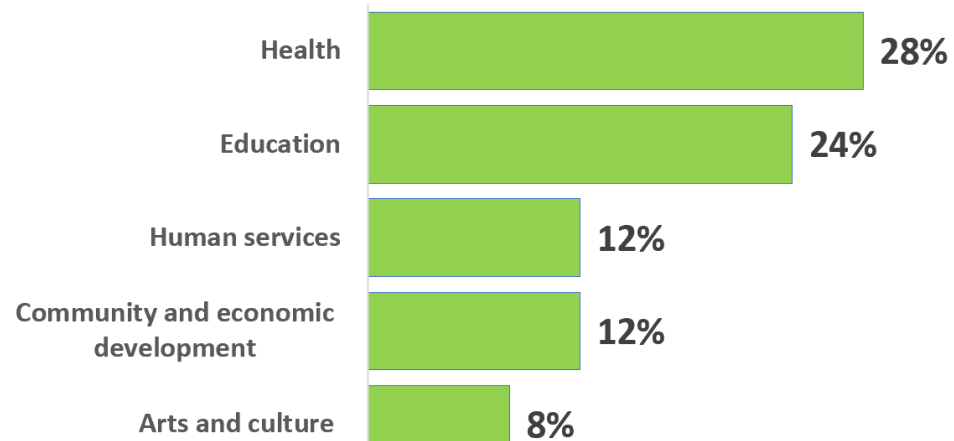
- Outlined at inception
- Focused on delivering or receiving benefits

Purpose

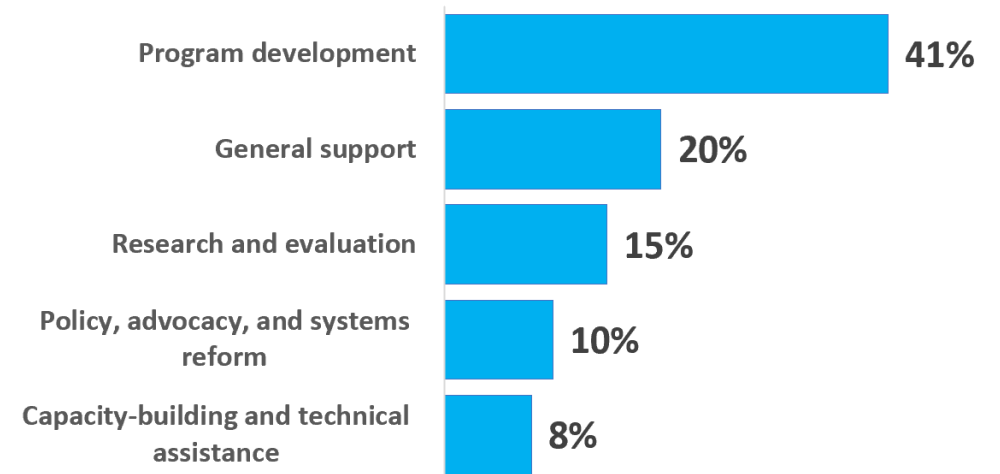
- Offers access to identified audience
- Provides net revenue

Foundation Landscape

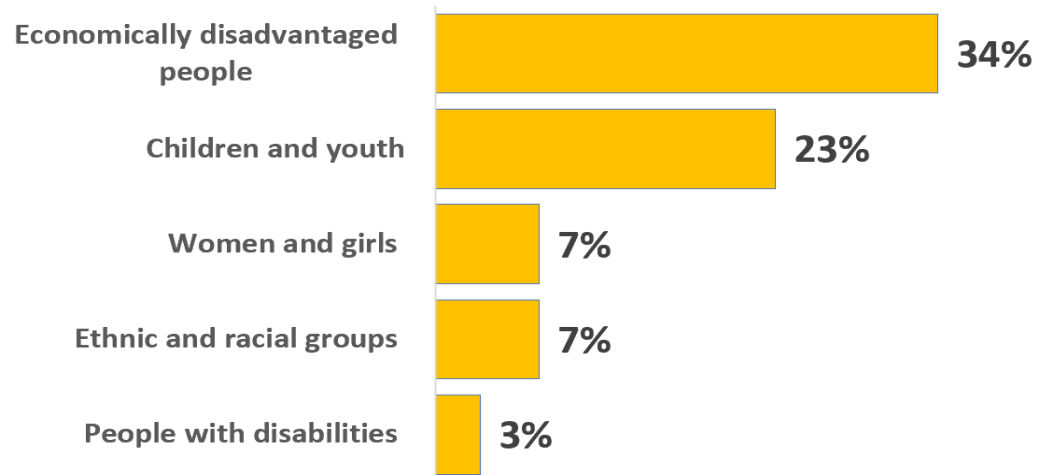
Top 5 subject areas by dollar amount



Top 5 support strategies by dollar amount



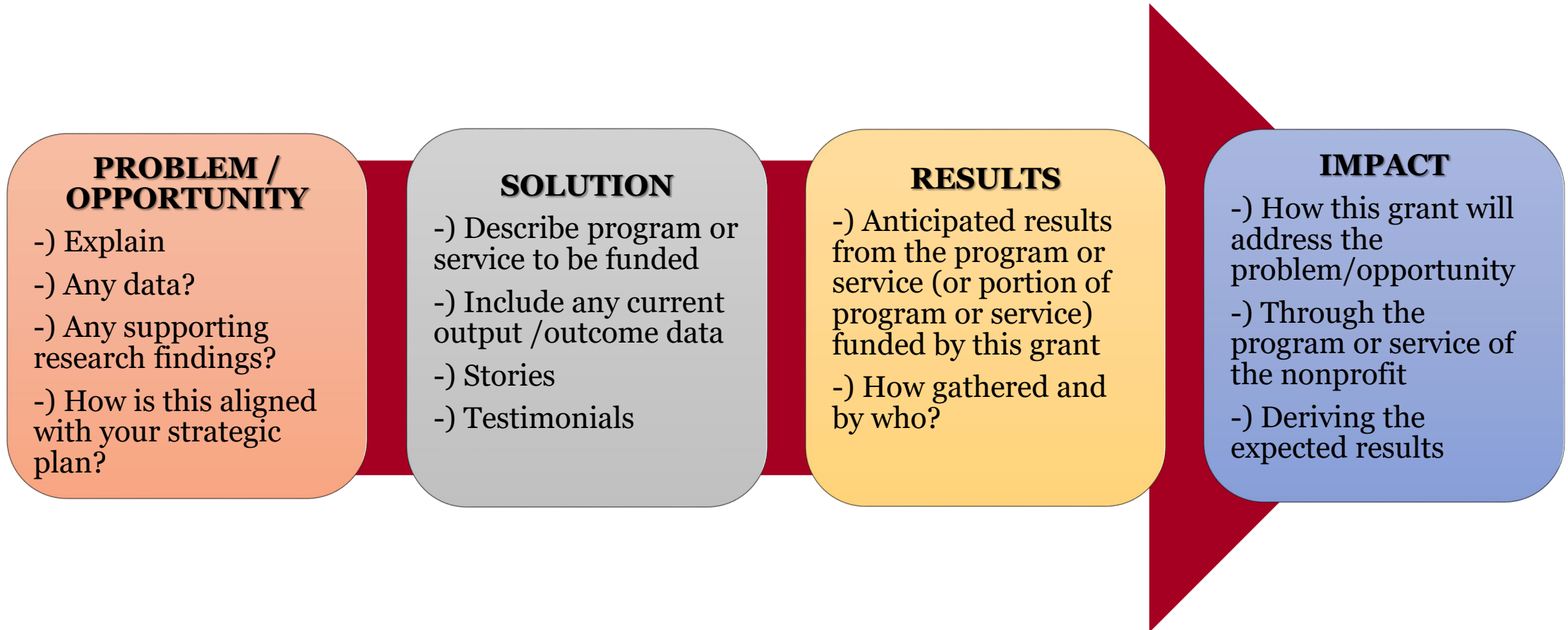
Top 5 populations served by dollar amount



Project/Program Development



Building the Case - Addressing the Need



Defining Impact = CHANGE

NEED	ACTION	SOLUTION	IMPACT
Financial barriers prohibit highly qualified students from attending or completing degree	Reduce barriers through scholarships	Scholarships	# of graduates with less student debt and equitable access; decrease in drop out rate
Wait list of students to participate in after school tutoring program	Increase staff; keep current staff to deliver more programs	Hire and keep qualified staff at competitive wage	Increased # of students reading at grade level
Inadequate space for sets, equipment, proper maintenance	Renovate building	Capital Campaign to grow capacity to store and maintain props, equipment	Higher quality performances, lower cost due to reuse of sets, proper equip maintenance, etc.



Developing the Plan



Develop Your Story

A big, compelling idea that is inspiring



The Problem or Opportunity +



Your Solution +



Your Results =



IMPACT - How the project and funder make a difference



Funder Match

Finding Funders – What to look for

- ❑ Previous funding awards
- ❑ Commitment to your funding needs
- ❑ Geographic limitations
- ❑ Range of award size
- ❑ Types of organizations they fund
- ❑ Special population groups supported by awards
- ❑ Award restrictions
- ❑ Other sources of information
- ❑ Match or cost-sharing grants or opportunities
- ❑ Matching or cost-sharing requirements
- ❑ Reporting Requirements



990 Primer

Form **990** Return of Organization Exempt From Income Tax
Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except private foundations)
Do not enter social security numbers on this form as it may be made public.
Go to www.irs.gov/Form990 for instructions and the latest information.

For the 2019 calendar year, or tax year beginning 2019, and ending

Check if applicable:
 Address change
 Name change
 Initial return
 Final return/terminated
 Amended return
 Application pending

Name of organization: CHANDHOK CHARITABLE TRUST
Doing business as:
Number and street (or P.O. box if mail is not delivered to street address): 4725 PRYTANIA ST.
Room/suite:
City or town, state or province, country, and ZIP or foreign postal code: NEW ORLEANS, LA 70115

Name and address of principal officer:
City or town, state, and ZIP code: NEW ORLEANS, LA 70115

Check type of organization:
 Section 501(c)(3) exempt private foundation
 Section 4947(a)(1) nonexempt charitable trust
 Other taxable private foundation

Form **990-PF** Return of Private Foundation or Section 4947(a)(1) Nonexempt Charitable Trust Treated as a Private Foundation
Note: The foundation may be able to use a copy of this return to satisfy state reporting requirements.

For calendar year 2008, or tax year beginning 2008, and ending

Check all that apply:
 Initial return
 Final return
 Amended return

Use the IRS label, otherwise, print or type:
Name of foundation: CHANDHOK CHARITABLE TRUST
Number and street (or P.O. box number if mail is not delivered to street address): 4725 PRYTANIA ST.
Room/suite:
City or town, state, and ZIP code: NEW ORLEANS, LA 70115

Check type of organization:
 Section 501(c)(3) exempt private foundation
 Section 4947(a)(1) nonexempt charitable trust
 Other taxable private foundation

Form **990-N** Electronic Notice (e-Postcard)
Department of the Treasury Internal Revenue Service
For Tax-Exempt Organizations not Required To File Form 990 or 990-EZ

For the 2011 calendar year, or tax year beginning 11/2011, and ending 12/31/2011.

Check if applicable:
 Terminated, Out of Business
 Gross receipts are normally \$50,000 or less

Name of organization: CHANDHOK CHARITABLE TRUST
Address: 4725 PRYTANIA ST.
City or town, state, and ZIP code: NEW ORLEANS, LA 70115
Employer ID: 75
Telephone number: (504) 31
Name of Principal Officer:
Website:

Public charities Form 990 includes:

- Charity assets
- Total donations and grants received
- Board and top staff members
- Whether the charity makes grants

Private foundation Form 990-PF includes:

- Assets
- Financial activities
- Trustees and officers
- Complete list of grants awarded for the specified fiscal year

Public Charities with under \$50,000 in gross receipts Form 990N includes:

- Legal name of organization
- Location
- Employer Identification Number (EIN)
- Principal officer's name

Finding Funders

Digital Resources – Candid

- Foundation Directory Online ([subscription](#))
- FDO Quickstart – ([free](#))
- Foundation Landscapes ([free](#))
- Philanthropy News Digest – search RFPs ([free](#))



Other Digital Resources

- Grants.gov – government grant resources ([free](#))
- Grant Station free enewsletter ([subscription](#))
- Grant Scape ([subscription](#))
- Grant Advisor – read & write reviews of foundations ([free](#))
- Grantwatch – can do basic search free ([subscription](#))
- Global Giving – Covid-19 grants ([free](#))
- [State Nonprofit Associations](#)



Proposal Creation



LOI – Letter of *Intent/Interest/Inquiry*

- To generate interest
- Request materials for a grant
- Outline the project scope
- Usually signed by director
- Reviewed by foundation
- If approved - invited to submit full proposal
- Typically, *no more than three pages - present the need or problem, the proposed solution, and organization's qualifications*

Creating the Story

- ❑ Online applications have character limits!
Every word serves a purpose, supports the story
- ❑ Know your audience
- ❑ Stories have flow
 - ❑ *Attention*: What problem do you solve?
 - ❑ *Interest*: Why are you passionate about solving the problem?
 - ❑ *Competence*: What qualifications do you have for solving the problem?
 - ❑ We are...
 - ❑ We can...
 - ❑ We have already done...
- ❑ Action: What do you want the reader to do?
- ❑ Emotion is good

Problem + Solution = Transformation



Basic Proposal Format

- ✓ Summary Statement
- ✓ Statement of Need
- ✓ Program Description
- ✓ Evaluation
- ✓ Budget
- ✓ Program Sustainability
- ✓ Organizational Strength and Capability
- ✓ Conclusion
- ✓ Appendices



Follow the foundation's guidelines

Do NOT include anything that is not requested!



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Proposal Tips

Should be **READABLE**

- Be concise – shorter paragraphs are preferred
- Link people, ideas, and budgets together
- Avoid jargon
- Try not to use footnotes

Should be **INFORMATIVE**

- Start and end with a summary
- Don't assume that the entire proposal will be read
- Explain the budget – ask for what you need and justify what you ask for

Should be **PERSONAL**

- Tell a story and connect with the reader
- Start with a solution rather than with a problem
- People aren't statistics



Michael Stachowiak
Director of Grant Development & Administration

Proposal Tips

Good proposals...

- ✓ Are concise and clear in what the program is trying to achieve
- ✓ Generate visible results within the grant period
- ✓ Have a concrete plan for measuring outputs and outcomes
- ✓ Have a completed and well-thought out budget
- ✓ Explain why your non-profit is the right one for the job
- ✓ Explain how your non-profit will leverage our grant dollars
- ✓ Value collaboration, learned and lived experience, and best practices



Community Impact Team
Community Foundation for Martin and Palm Beach Counties



Common Mistakes to Avoid

- Not following instructions
- Failing to thoroughly research the funders' interests
- Focusing the proposal on the needs of your organization
- Careless editing
- Preaching to the choir
- Not asking for the money
- Asking for the wrong amount
- Submitting sloppy budgets
- Submitting a proposal late
- Not asking for a grant



TFRS @ Your Desk

WEBINARS | PODCASTS | COURSES



<https://philanthropy.iupui.edu/professional-development/tfrs-at-your-desk>

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