

Sustainability

Preparing Foundation Proposals
June 2009



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A service of the Corporation for National and Community Service - Special Projects and Sustainability Initiative

Dear "Proposal" Colleague,

With the right mix of talents, skills and personalities within your volunteer leadership, your organization will thrive and grow. Make good use of real star leaders in your community by placing them on your Board of Directors and Advisory Council. Click on the titles on the right to learn about...

The Right Kind of Foundation

When It's Time to Write...

Evaluate for Success

Do you have questions or ideas about preparing foundation proposals? Contact us through OntheGo@CampaignConsultation.com for more information. You can still access previous issues of On-the-Go eTA by clicking on the back issues at the bottom of the page.

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The Right Kind of Foundation

Learn as much as you can about the kind of foundation you are approaching to select those foundations that will seriously consider you for funding. Here is a chart to help you understand the basic characteristics of foundations:

Foundation Types	These May Be...
<p>Private Foundations</p> <p>Usually receive funding from a single source.</p> <p>Private foundations must make "qualifying distributions" of at least 5% of the average market value of their investment assets in every fiscal year by the</p>	<p>1. Independent or Family Foundations receive endowments from individuals or families. They often continue to show measurable donor or donor-family involvement.</p> <p>2. Company-Sponsored or</p>

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Tips for the Times

Having a contact on a foundation staff or board can be very helpful in getting your proposal to the front of the pile. Ask around for anyone who may have contacts at the foundation you are approaching.

Join up to promote more civic participation

- [VISTA Viewfinder](#)
See the latest issue
- [e-Seminars for Sustainability](#)
July 1, 2009 Problem Solving for Federal Fund Seekers

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every fiscal year by the end of the following year.

As mentioned earlier, during this economic downturn, assets are less in value, leaving less to donate. Competition is fierce.

Sponsored or Corporate Foundations receive funds from their parent companies, although they are legally separate entities.

3. **Operating Foundations** run their own programs and services and typically do not provide much grant support to outside organizations

Public Foundations (Also known as a “Grant-making Public Charity”)

Receive funding from numerous sources and must continue to seek money from diverse sources in order to retain their public charity status

1. **Community Foundations** seek support for themselves from the public, but like private foundations provide grants. Their grants primarily support the needs of the geographic community or region in which they are located.

2. **Giving Circles** composed of groups of individuals who come together to pool their resources to fund programs of their own interest. Many are formed by women. Examples include the Los Angeles Women’s Foundation, the Ms. Foundation for Women, the New York Women’s Foundation.

3. **Special Funds** set up to serve special population groups and field-specific funds, such as health funding foundations set up with proceeds from health care conversions—often referred to as “new

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referred to as "new health foundations", legal defense funds, or public education funds.

Since all private, public and corporate-sponsored foundations must file the IRS Form 990, use it to learn about average size grants, board members who your stakeholders may know, and compare status of finances to earlier years to understand availability of funding. The IRS Form 990 is available to view for free at www.guidestar.org

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When It's Time to Write...

Sitting down to write a proposal for funding from a foundation can be a daunting task. Break down the task into manageable steps as shown below. Allow ample time to compose, format, compile, and deliver the proposal package to a potential funder.

Brainstorm or list ideas

- Write out the need that you are asking a donor to support
- Prepare a budget to determine how much your project needs
- Develop your funding configurations - i.e., one funder, several funders, other.

Gather materials

- Assemble background and supporting information – i.e., fact, statistics, research, examples, etc.
- Identify who can provide the information needed, staff, program officers, community experts, etc.

Write rough notes and address

- What is most important to the funder
- How the project fits with your mission
- How the project fits with the funder's mission
- What message you want to convey

Research and possibly contact funder

- Get guidelines
- Review submission dates and requirements
- Ask for technical assistance:
 - Can you meet with the funder?
 - Will the funder read a draft?
 - What is the notification policy and timeline?

Prepare an Outline

- Determine the requested proposal format – i.e., letter of inquiry, letter proposal, full proposal, etc.
- Follow the funder’s guidelines.

[Click here](#) to continue reading the steps to preparing a winning proposal.

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Evaluate for Success

An aspect of grant funding from foundations that often throws awardees for a loop is answering the question, “How will you evaluate the success of your program or project?” Some grants have detailed evaluation instructions. Others allow you to provide your own methods for evaluation. You will find it helpful if you think of possible evaluation methods at the beginning of project design. Keep in mind that all results must be measurable.

The two common methods of evaluation are **quantitative** and **qualitative**:

Quantitative methods measure or count data. They attempt to answer the question, “How much?” using statistical analysis such as averages, means, percentiles, etc. Use quantitative methods for questions that involve:

- Understanding quantities or frequency.
- Determining cause-and-effect.
- Comparing different things.
- Establishing numerical baselines.

Qualitative methods use direct or indirect contact with people. They can consist of interviews, observation, or review of relevant documents. Qualitative methods can be quite rigorous and be excellent for studying processes and meanings, but they do not provide calculated data. Use qualitative methods for questions that involve:

- Understanding the feelings or opinions of people.
- To gain insight into relationships or patterns.

These words apply no matter your level of wealth...

“Every right implies a responsibility; Every opportunity, an obligation; every possession, a duty.”

– John D. Rockefeller, 1839-1937
American industrialist and philanthropist.

- To gather multiple perspectives on a particular subject or problem.
- To identify approximate, rather than exact, information.

Whether you do your own evaluation or hire someone to do it for you, be certain that you are providing the most relevant information to your foundation funder. Check with them to determine their preference. Remember, many foundation proposals allow you to add the cost of an evaluation to the request.

[Click here](#) for a sample Final Grant Evaluation Form to evaluate program impact from the Oshkosh Community Foundation.

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Let us know

Let us know about any proposal writing tricks you have employed to gain funding for your organization. Contact OntheGo@CampaignConsultation.com We would be happy to answer questions or to give you more support.

Thank you for your interest in On-The-Go eTA. We encourage you to send this and other issues of [OTG eTA](#) to friends and colleagues who would benefit from the information. Also, if you're on information-overload, you may request [email removal](#). Otherwise OTG e-TA will be back soon with another edition.

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When It's Time to Write... (cont.)

1st Draft

- Keep referring back to your outline

2nd Draft

Proofread

- Print out.
- Read aloud.
- Give it to someone else to read.

3rd Draft

Format

- Follow the funder's guidelines.
- Use headings to define sections.
- Incorporate white space and bold type if allowable to help with readability.
- Check your page breaks.
- Format any graphs and charts.

Proofread again to catch any mistakes made in formatting

- Ask others who have fresh eyes to read for clarity, spelling, grammar, etc.

Final Draft!

- Prepare the package according to funder's instructions.
- Deliver in a timely manner.

For an interactive tutorial to help you get the most from your proposal writing efforts, go to [Producing Proposals that Work](#)

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Resources

eOrganizer

eOrganizer is an interactive clearinghouse for the latest and greatest web instruments of change. This GIZMO shows you how to maximize free and inexpensive online tools and resources to mobilize people around issues and within organizations. Structured around eight categories important to community organizing, it offers descriptions and provides access to many of the most current web arenas and strategies for bringing groups together to create community change.

<http://www.campaignconsultation.com/GIZMOs/eorganizer/index.html>

The National ASK (Awareness, Skills, Knowledge) to Sustain Institute, sponsored by Corporation for National and Community Service, provided by Campaign Consultation, Inc. 1998, 2002.

The CNCS Resources Now! National Institute, sponsored by Corporation for National and Community Service, provided by Campaign Consultation, Inc. 2005-07.

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Learning Products and Services

Sustainability:

OntheGo@CampaignConsultation.com is designed to give information fast on building capacity. Use this online support for advice from a fundraising professional. Contact OntheGo@CampaignConsultation.com

GIZMOs:

(*Giving Information for Zooming Mission Objectives*) GIZMOs are resource and fund development tools for you and your volunteers. They are tangible products in packets, pocket brochures, CD-ROMs, games, etc. They feature a myriad of fundraising topics such as The Case for Support, an interactive online resource. View and use our newest GIZMOs at www.CampaignConsultation.com/gizmosplash

The Chronicle of Philanthropy:

Everyone who comes to a Resources Now! National Institute gets a free subscription to the Chronicle for a year. Participants in CNCS Campaign Consultation workshops receive the latest issue free of charge plus a \$20 discount on one year's subscription.

Workshops/Clinics:

The Corporation for National and Community Service (CNCS), through its T/TA service provider Campaign Consultation, Inc., offers a three-hour workshops and clinics for those interested.

WebWizard:

CNCS sponsors this new service that Campaign Consultation provides to assist programs and projects in maximizing their websites for program, client, volunteer and fundraising needs.

Online Courses/Webinars:

Web course delivery of topics pertinent to resource development such as — **Build Fundraising Volunteer Champions** and **Cause Related Marketing and Corporate Partnerships**. Available through the Resource Center at <http://www.nationalserviceresources.org>

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- [May 2009 *Searching for Volunteer Leadership Stars*](#)
- [Mid-April 2009 *Laying Out the Welcome Mat for Your Community*](#)
- [April 2009 *Preparing for Civic Participation*](#)
- [Mid-March 2009 *Saving Time*](#)
- [March 2009 *The Power of Small Gifts*](#)
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