

Welcome!

Keys to Online Proposal Writing: Telling Your Story in 500 Words or Less

August 26, 2010
9:00 AM - 12:00 PM

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Introductions

- Your Name
- Your Organization
- Your Level of Involvement in Proposal Writing
- A short 'Sound Bite' of What Your Organization Does Best
- A project or program that you would like to see get funded or get more funding

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Agenda

Agenda:	Time
Welcome & Introductions	9:00 AM
Review Objectives and Agenda	9:05
Context Setting: Trends in and Assumptions About Resource Development.	9:10
High Performance Programming and the Proposal Development Process	9:30
Making Solid Choices - Go/No Go Decision-Making	9:50
Online Grant Seeking Terminology	10:10
Online "Packages" vs. Online "Text"	10:20
Marketing Concept Development	10:45
Break	11:05
Proposal Development Basics with GOALS	11:10
Evaluation and Closure	11:50
Adjourn	12:00 PM

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About Today

- Participatory
- Contribute your wisdom and experience
- Hands-on
- Ask!

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Key Ingredients for Successful 21st Century Proposals...

As you think about your need to advance your mission,
what assumptions do you have about how you will
generate the necessary resources?

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Assumptions about resource development

- GPG Orientation: Resource development is a process of asset building.
- What are examples of assets that your organization has?
- Which of these assets could be developed to create greater impact?
- GPG Orientation: Resource development is a function of (not a replacement for) strategic planning, which, in turn is a process of asset development.

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Trends in what funders are looking for:

- Research based...
 - Which means you need to stay on top of the research....
- Matching resources
 - Many of our clients identify lack of match as a key impediment.
- Collaboration (Maximize existing resources)
- Sustainability
- Others?

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Recognizing External Trends - Government/Foundation Funding

- Generally, funding programs for local government programs (Federal, State, and major foundations) have smaller budgets today than in 2000.
- Budgets will most likely continue to decline.
- But....grant funding may actually increase in this environment. Why?
- We have already seen an increase in highly categorical funding and an increase in niche granting.
- Increased Foundation Support for Local Government
- Public/Private Partnerships

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Building Strong Cases

- Proposal Writing Tips
- Planning contents
- No Jargon!
- Think about 21st Century readers

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High Performance Programming

- Five Keys to Designing and Expressing HPP:
 - Scale
 - Impact
 - Cost effectiveness
 - Sustainability
 - Capacity Building

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Demonstrating HPP in Proposals

Typical Proposal Component	High Performance Program (HPP) Element
Need / Assets	Impact
Program Description	Scale, Impact, Capacity Building
Monitoring / Evaluation	Impact, Capacity Building
Budget	Sustainability, Cost Effectiveness

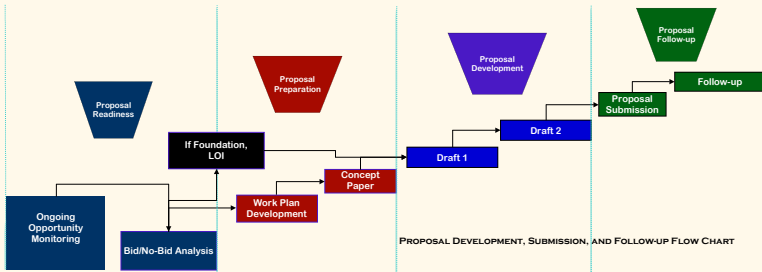
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Funder Research

- People give to/invest in people
- Take every opportunity to get to know/find out about the people involved with your potential funders
- Opportunities
 - Telephone
 - Bidders Conferences
 - Technical Assistance
 - Join review teams

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Proposal Development Flow Chart



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Rules of Thumb - Be wary of:

- Any competition with less than \$10M on federal level or \$5M on state level
- For Foundations, decide on what is the lowest level of grant that is meaningful for you.
- Any competition which is a re-granting of a previous award cycle.
- Any competition for which extremely specialized expertise is required that you don't really have.
- But...be ready to stretch yourself...it is OK to learn new things and move in new directions as part of a grant process...to use a grant as venture capital to start new initiatives.

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What to look for:

- Key contacts
- Keep Records
- Previous Grants --- Key Contacts
- Decision Makers
- Their funding history --- related committees
- Links to your legislative/congressional delegation

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Key Sources:

- Foundation Center--- <http://fdncenter.org/>
- The Grantsmanship Center --- <http://www.tgci.com/>
- Grants Network: Research --- <http://ecivis.com/>
(includes State of CA)
- Grants.gov ---- <http://www.grants.gov/>

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Go/No-Go Decision Making

- Existing or anticipated program or need
- Level of potential competition
- Impact of proposal preparation process on staff
- Potential benefits
- Any identifiable advantages/disadvantages of grant and contract award.
- Any examples?

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More assumptions about resource (asset) development...

- Requires a strong link to strategic planning.
- Provides institutional funders the opportunity to participate in working toward fulfillment of your mission.
- Funders will support you if you articulate your mission and programming strategy in ways that are truthful and compelling.
- Mission and strategy – not funding opportunities– should be the primary driving force for programming.
- Commit to maintaining diversity in funder support (a variety of institutions and levels).

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Working Assumptions about resource development... Getting comfortable with some language.

- Words: Donors-Funders...is there a difference?
- Fund Raising - Fund Development - Resource Development...is there a difference?
- More Words: Grants - Contracts...what is the difference?
- Grants - Proposals...what is the difference?

Key General and Online Grant Seeking Terms

Solicitations	Federal Forms	Grants.gov
NOFA	SF-424	AOR
RFP	SF-424A	DUNS
SGA	SF-424B	EIN
RFQ	SF-LLL	CCR
CFDA	E.O. 12372	POC
RFA		
RFI		
LOI		

Online "Packages" vs. Online "Text"

Online Submission Tips

- Be wary of system slowdowns or crashes on deadlines
 - Assume that you will encounter issues and build in extra time
- Test the system
 - Make sure you are using specified and supported software
- Register and prep in advance!
- Monitor automated feedback notices - notify key personnel
- Check whether backup filing is required
 - Fax cover page, CD, etc.

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Grants.gov Online Submission System

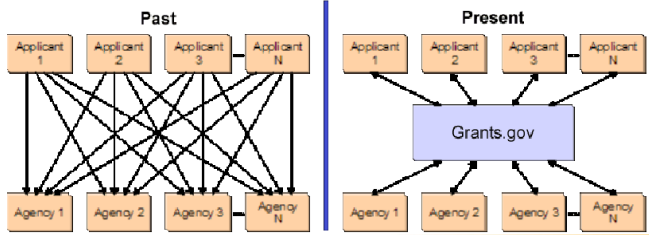
- Primary Functions:
 - The Grants.Gov web site serves two primary purposes. The site enables the user to:
 - Find Federal Grant Opportunities (“Find”)
 - Apply for Grants (“Apply”)
- What Grants.gov is **NOT**
 - A grant making agency
 - Involved with the review or award processes of grant making agencies
 - A resource for additional information about specific offerings (see individual agency websites)

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The screenshot shows the Grants.gov website homepage. At the top, there is a navigation bar with "Contact Us", "SiteMap", and "Help" links. Below this is a header section with the Grants.gov logo and a banner image featuring several people. The main heading reads "Find. Apply. Succeed." followed by a paragraph describing Grants.gov as the single access point for over 1,000 grant programs. A "What's New This Week at Grants.gov" section lists updates such as "IBM Mac Viewer Status" and "New Opportunities This Week". On the left side, there is a vertical menu with categories like "FOR APPLICANTS", "ABOUT GRANTS.GOV", "FOR AGENCIES", "RESOURCES", "HELP", "CONTACT US", and "SITE MAP". On the right side, there is a "Quick Links" section with links to "Grant Search", "Grant Email Alerts", "Get Registered", "Applicant Login", "E-File FPOC Login", and "Agency Login". At the bottom, there are logos for "Grants Funding Initiative", "E.GOV", "FIRST GOV", and "Benefits.gov".

Grants Environment – Past & Present

- The Grants.gov solution streamlines and simplifies the “many to many” lines of communication that complicated the Federal grants environment



- Like a post office, Grants.gov serves as the “trusted” broker between Federal agencies and the grants community



Online Text Tips

- Prose needs to carry the day
 - Why?
- Strict word and/or character limits
 - Make sure your count matches the online system
 - Test the online system with the maximum words/characters (words vs. characters)
- Pay special attention to formatting issues
 - Cutting and pasting from word
 - If available, use the “preview” function to ensure proper format

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EasyGrants Online Text System

The screenshot shows the 'EasyGrants Online Text System' interface. On the left is a navigation menu with links: Project Location, Activities and Metrics, Uploads, Budget, Matching Contributions, Permits and Approvals, Review and Submit, FAQ, Help, and Log Out. The main content area is titled 'Amount Requested and Matching Contributions - Click Help for examples and instructions.' It contains several input fields: 'Grant Amount Being Requested from NFWF' with a dollar sign and a text box; 'Matching Contributions Proposed' with a dollar sign and a text box; 'Project Grant Start Date' and 'Project Grant End Date' with date pickers; 'Project TitleName' with a text box and a note 'Limit to 60 characters, including spaces.'; 'Project Description' with a text box and a note 'Two sentence project summary. Limit to 200 characters, including spaces.'; and 'Project Abstract' with a text box and a note 'Limit to 1500 characters, including spaces. Include project outcomes.'

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EasyGrants Features

Task Name	Funding Opportunity	Project Title	Due Date	Status	Date Submitted
Full Proposal	Walker Basin Restoration Program		12/1/2010	Incomplete	

[View PDF](#)

Preview Option to check formatting and text.

Validation Summary	
Page Name	Status
Contact Information	✗ Incomplete
Project Information	✗ Incomplete
Project Location	✗ Incomplete
Activities and Metrics	✗ Incomplete
Uploads	✗ Incomplete
Budget	✗ Incomplete
Matching Contributions	✓ Complete
Permits and Approvals	✓ Complete

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CyberGrants Online Text System

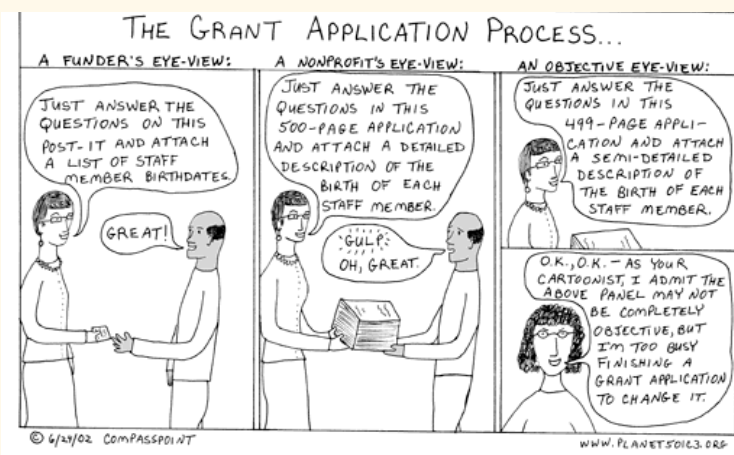
Preview Form

This is an example of the application questions with which you will be presented. It is recommended that you compose the answers to the paragraph questions in a word processing program and then cut and paste that text into the online application.

<p>*Overview of Proposed Project (Paragraph; 2000 character maximum)</p>	<p>Instructions:</p> <ul style="list-style-type: none"> • Provide an overview of the proposed project and CETF investment. State in 1-3 cogent, concise paragraphs what the project is intended to accomplish, why it is important and the overall approach. Make sure that the reader can easily discern from this section exactly what the project is about—informing the reader about the “who, what, how, when and why” such that if this section were included in a public document that the media would immediately understand why and how your project will make a difference in accelerating the deployment and adoption of broadband technology, helping to close the Digital Divide in California. <p>If additional space is needed, you may continue your response in the “Additional Space” field below.</p>
<p>Additional Space (Overview of Proposed Project) (Paragraph; 2000 character maximum)</p>	<p>Instructions:</p> <ul style="list-style-type: none"> • If additional space is needed, you may continue your response here.
<p>*Broadband Technology Strategy (Paragraph; 2000 character maximum)</p>	<p>Instructions:</p> <ul style="list-style-type: none"> • Discuss how broadband technology is part of a comprehensive set of strategies to transform and improve the well-being of underserved community and describe how the investment will help close the Digital Divide.

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Orientation to Potential Funders and What They are Looking For



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The marketing concept as a foundation for proposal development.

- Proposing and giving/granting is a transaction.
- Remember the marketing axiom “nothing sells like a great product.” What is your product and how much does it cost?
- Determine what you give and what you get as the foundation for your proposal.
- If you know that and the “proposal team” is in agreement, chances are a successful proposal will be developed. Use the marketing concept as a focus tool for the proposal team.
- A marketing concept is a one sentence (can be a run-on) twenty-five words or less statement which explains what each party gives and receives as part of the transaction.

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Marketing Concept Scenario

You work for You Lead Youth Follow (YLYF), a nonprofit organization partnering with a local university to design and implement a comprehensive training program for mentors who participate in your organization's group youth mentoring program. The mentor training program incorporates new tactics designed by university researchers and piloted among a subset of your organization's mentors with promising results. To launch the training program in full will require additional financial resources. The US Department of Justice (DOJ) Office of Juvenile Justice and Delinquency Prevention (OJJDP) has released a \$250,000 funding opportunity aimed at alleviating issues, including drug abuse and truancy, among underserved youth through strengthening mentorship programs. Key goals of the OJJDP program include:

- Expanding mentoring strategies;
- Improving system efficiency; and
- Improving outcomes of at-risk youth mentoring programs.

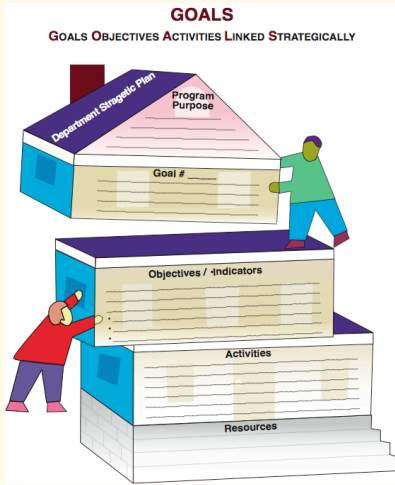
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Marketing Concept - Your Task

You are the lead staff person bringing together a team comprised of YLYF and the local university assisting with the training program design to develop this proposal. To clarify your thoughts as you prepare for this work you write a 25 word-marketing concept.

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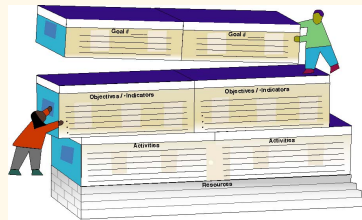
Proposal Development



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What is a goal?

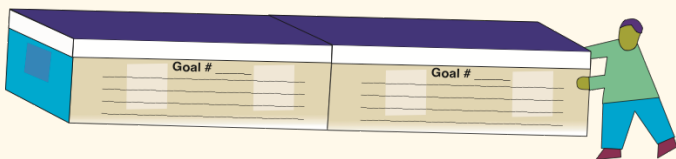
- A goal is a broad statement, not usually in measurable terms which describes the end towards which all objectives are directed.



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Goal Case Studies

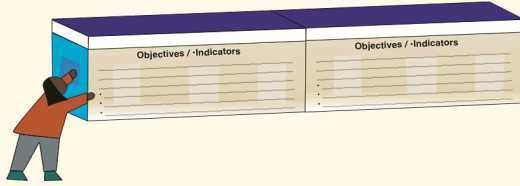
- California Cultural and Historical Endowment
- Russian River After School Partnership
- Sonoma County Family Justice Center



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What is an objective?

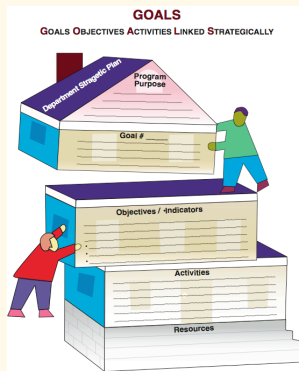
- Definition: An objective is a subgoal. It identifies a short-term, measurable step within a designated period of time that is moving toward achieving a long term goal.



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Program Objective

- A program objective is a specific and usually quantifiable statement of measurable outcome which can be used to determine program progress towards the program goals. Collectively, objectives represent a quantification of the program goal.



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Defining Program Objectives

- Objectives are stated in measurable terms.
- A program could have between 5 to 12 objectives depending on scope.
- There should be at least one objective for each component of your program.
- The objectives should, taken together, have the effect of achieving the overall program goal.
- There should be cohesion among the objectives.

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Tips for Approaching Defining Program Objectives:

- Make a list of things that must be done to achieve your program goals.
- Rewrite each item on the list in the form of a result that can be measured and with some specification of a time allotment for the objective.
- Review all of the objectives and adjust them to achieve an appropriate balance between them.

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The SMART Objective

- Specific
- Measurable
- Attainable
- Realistic
- Time-Bound

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Program Objective Examples (critique)

- The program will train 80 teachers.
- The program will develop 15 community health centers.
- A minimum of 100 individuals will participate in the work experience program.

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Developing Indicators

- What is an indicator?
 - Success of programs is critically linked to choosing appropriate indicators and regularly collecting information on those indicators.
 - An indicator is: a tool that illustrates how close you are to achieving your objective and whether you are headed in the right direction.

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Qualities of a Good Indicator

- Four qualities of a good indicator:
 - Relevant...something that the program will affect.
 - Understandable...can people relate to it through common knowledge or personal experience
 - Measurable...and measurable by mortals.
 - ▶ Effective indicators are based on data that is easy to access or that can be measured directly.
 - ▶ Or even better...that another entity is collecting data for.
 - Dependable...does the indicator give you information you can trust.

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Types of Indicators

- Types of Indicators
 - Output or Process Indicators.
 - ▶ Effort vs. Effect.
 - ▶ Quality vs. Quantity.
 - Intermediate (Impact) Indicators.
 - ▶ Sometimes referred to as proxy indicators.
 - Impact Indicators.

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Choosing the Right Indicators

- Choosing the right indicators
 - Indicators relate to objectives.
 - Objectives relate to goals
 - You may have multiple goals - each with multiple objectives that in turn have multiple indicators.
 - A laundry list is not the answer.
 - A carefully selected set of indicators saves time and resources.

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Demonstrating Impact

- How to demonstrate impact?
 - Changed behavior:
 - ▶ % of participants (people or institutions) that have adopted new practices
 - Adoption of new policies
 - Improvement of Service Delivery
 - ▶ Specific quantitative measurements of the type and number of services delivered before and after ---service (linked to a research-based indicator)
 - Increased Efficiency in Service Delivery

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Goal, Objectives, Indicators Example

Goal	Objectives	Indicators
Improve basic computer and Internet, and online job search skills of unemployed individuals in Oakland.	Assist 400 individuals to gain basic computer and Internet skills by June 30, 2011.	<ul style="list-style-type: none"> • Attendance records. • Competency levels exhibited during training program assessments.
	A minimum of 200 individuals create email accounts, and complete online job searches and job applications.	<ul style="list-style-type: none"> • Email communications with participants. • Results of random sample follow-up surveys with participants and employers.

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Objectives and Indicators of Success

What key goal and corresponding objectives will be realized and how will you know it (indicators)?

Putting It All Together

What specifically will your program achieve and how will you monitor and evaluate its effectiveness?

Thank You!

Meeting Evaluation