Effective Project Management in the Proposal Development Process
You have to develop a proposal to submit to a Foundation... Now what?
First and Foremost

– Do your homework!
– Know all you possibly can about the foundation before you start drafting
  • Philanthropic priorities
  • Past giving to your organization
  • What kind of proposal the foundation prefers
Communicating with the Foundation

- Can you talk to a program officer?
- Ask them how they would like you to work with them
You Need Others

Meet with the program P.I. -
- Determine what information already exists
- Interview the P.I. for facts & information
- Count on many drafts!
- Have colleagues read & review your proposal
Finance Budget

– Be sure to include:
  • Program Costs
  • F&A
  • Does the foundation allow a gift assessment fee or other overhead?
  • What else do you need?

– Share proposal broadly with your financial colleagues for input
Template for Proposals for Grant Makers

(Ideal if kept to 2 pages or less)

Proposal Title:
- Project name: Keep it brief—telegraphic but descriptive and maybe even slightly provocative
- It’s okay to excite the interest of the reader!

Faculty Leader(s):
- Introduce who is leading the initiative
- Include any "endorsers/PIs of stature" as appropriate
- Provide supporting credentials of faculty leadership
Template for Proposals for Grant Makers

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**Background:**

- Set the context, the societal need
- Answer two questions: “Why your institution?” and “Why now? (especially important given the multitude of choices investors have)
- Explain why this opportunity is right for the prospective grant maker.
Template for Proposals for Grant Makers

**Project Description:**
- The basic mechanics of the program
- Include any inter-disciplinary/cross-University elements if they exist.

**Strategic Objectives:**
- Potential big picture impacts of the program and specifically what you're trying to accomplish.

**Measurement:**
- Results, effectiveness are critical, especially in the current environment
- How will your institution be able to quantify to the "investor" that their dollars were well spent?
Template for Proposals for Grant Makers

**Sustainability:**
- Existing track record of program
- Current alternative funding sources
- If a new program, what’s the viability of program to last beyond the current year (and the current grant maker you're soliciting)

**Funding Needed:**
- Make a specific ask, with a total dollar figure
- If there’s initial interest from the grant maker, a subsequent budget breakout can be provided.
There are two issues to consider when thinking about foundation funding for your program:

- Whether or not foundations are the right funding source; and
- Whether or not your work is a “project.”

Match your idea with the right funding source: Which one is best?

- Corporate funders.
- Government-funded programs.
- Foundations

NB: Some may be of interest to *more than one* source.
Finding the Foundation-Fundable “Project” in an “Idea”

Conceiving and designing a foundation-fundable project is hard work
- Narrow your topic
- Be careful of ideas larger than you can possibly manage.

A good example:
- Eradicating world hunger is a good “idea,” but it is not a foundation-fundable “project.”
- Fundable projects to eradicate hunger might include operating a food bank, a soup kitchen, or a meals-on-wheels program.

The more specific, the better:
- Conceive of a more effective and efficient way to deliver your anti-hunger program, perhaps even to a new constituency or region.
Finding the Foundation-Fundable “Project” in an “Idea”

To determine if your project is foundation-fundable, ask yourself:

- Is it doable?
- Does it have a beginning, middle and an end?
- Does it have a focused goal?
- Can you answer the question, “So what?”
- Can you identify who benefits? Is this an appropriate population to benefit?
- Does it have measurable objectives?
- How will you know when you’ve met your goal?
Give your “project” even greater impact:

- Demonstrated institutional support
- Ability to leverage support from other places
- Community involvement
- Involvement of those most affected
- Novel approach – What sets you apart?
Finding the Foundation-Fundable
“Project” in an “Idea”

Ability to replicate the results

Once you have answered the above questions satisfactorily, you are ready to explore the world of corporate and foundation funding.

This office can help you determine strategy and provide advice on suitable foundation and/or corporate prospects for your project.