Preparing Better Proposals

Sponsored by the Office of Corporate & Foundation Relations

Friday, February 27
Today’s Topics:

Part One – The Proposal Writing Process
Part Two – Messaging in Proposals
Break
Part Three – Other Essential Elements
Part Four – Bringing it all Together
Q&A and Closing at 4:00 PM
A Quick Survey:

• *Proposal Writing is Your Primary Job.*

• *Generating Proposals is an Important part of your Job.*

• *I don’t do much work with Proposals… but I still want to get better at it.*
Introductions:

• Your Name
• Unit
• Position (Role)

• What do you want to get out of this session?
Group Chat:

What Makes a Proposal Great?
Part One

• Your Role in the Proposal Process

• Partners in the Process

• Getting Organized – Getting Started
Proposal Outline

I. Executive Summary
   One paragraph that describes and outlines your objectives
   Describe impact the grant/gift will have
   Confirm the amount we are asking for over what time period

II. Context and History of ______ and the UW
   History
   Vision and Mission
      Track Record
      Leadership

III. The Science of (or field of) ___________
   What we do and how
      When we are successful, what does it look like?
      Highlight our success – what has worked?
   ________’s Credibility in the field of _________
      Who else is doing this?
   Direction of the field
Proposal Outline

IV. _________ at Work: Using _________ to Solve _________
   Applications of Research
   Strategies and Implementation Tactics
   Scope and breadth of questions asked and problems solved
      And why is that important?
   Problems yet to be asked and solved
      And why is that important?
   The _________ ecosystem and where _________ fits
   Partners and Collaborators
      Scientific – governmental – non governmental

V. Taking the Next Step
   Summary of your “Big Vision”
      We have the right people, plan, and ideas
   Explain how _________ is funded and the role private support will play
      Research capital and tools needed to achieve Big Vision
      What work will the new tools enable?
         New discoveries
      Benefits – outcomes – impacts on people and society
Proposal Outline

VI. In Conclusion
   Why do we really want to do this?
   What difference is it going to make?
   Why now – why here?

VII. Budget
     Listing all other sources of support

VIII. Appendices
      Strategic Plan – timeline/gant chart with cost hits
Part Two

Messaging in Proposals

• Asking & answering the right questions
• Appeal to your readers
• Engage your readers
• Tailor proposal to the funder’s priorities
Funding Motivations

“There is partnership in philanthropy. We need grantees. We enable good work.”
- Roxanne Ford, W.M. Keck Foundation

“We don’t give money away, we hire people to do what we want to get done.”
- President, $5 billion foundation
Funding Motivations

In general...

Foundations:
- Outsource their philanthropic ideals
- Support well defined plans, innovative ideas, effective programs
- Expect outcomes and accountability

Corporations:
- Invest in their community, workforce, and reputation
- Expect recognition and visibility
- Support mutually beneficial plans with a bottom-line focus
Funding Motivations

Gordon & Betty Moore Foundation

The Foundation applies four “filters,” or criteria, to evaluate potential grants, which ask if a project:

- is important,
- makes a difference and has enduring impact,
- has measurable outcomes, and
- contributes to portfolio effect.
Appeal to Your Readers

What do you do better than anyone else?

The Cupp Library is the world-renowned rare book and special collections library at the University of Washington. The library makes accessible original documents for the research of students, faculty, and scholars.

Why is that important?

When we place original documents into the hands of students we inspire them in the most profound way – through the actions and words of the individuals who formed our history.
Appeal to Your Readers

Why is that important?

When students follow in the path of our history, we inspire them to become great scholars and great citizens.

Why is that important?

Scholarship creates innovative ideas and interpretations - it allows students to evaluate the past in new ways without preconceptions.

Why is that important?

Because the past is the prologue of the future.

Keep asking until you can’t answer.
Kresge Foundation’s 9 Core Values

- **Creating opportunity** – Expanding opportunities for low-income people to improve their quality of life.
- **Community impact** – How will the proposed project benefit the larger community?
- **Institutional transformation** – Does your proposed project have the capacity to profoundly influence the overall organization and its operations? How?
- **Risk** – How are you using new and possibly untested approaches for addressing the needs or tensions of communities in flux.
Kresge’s 9 Core Values

- **Environmental Conservation** – Describe your sustainable building practices, embodies the principles of sound land-use planning, and promotes environmental stewardship and/or historic preservation.
- **Innovation** – How might your project advance best practices in a particular field?
- **Collaboration** – Multi-party, interdisciplinary approaches to problems that defy solution by a single sector.
Kresge’s 9 Core Values

- **Underserved geography** – High concentrations of need and low financial capacity, such as poor rural areas or cities with a minimal tax base?
- **Diversity** – Does your staff and board reflect the racial, ethnic and gender composition of the population they serve?
What is Kresge looking for?

**Education** – Our education work is rooted in a desire to address systematic and pervasive inequities. We support organizations and institutions working to address the critical challenges brought about by the global economy and the issues associated with educating a workforce capable of competing successfully in this economy. Four values represent our top priorities: creating opportunity/access, diversity, environmental conservation and community impact.
Foster School’s response:

UW/Foster School values and our community

Per the Foundation’s priorities, the following section of this letter focuses exclusively on the four primary values Kresge wishes to be present in educational projects.

Creating Opportunity

The UW embraces its responsibility to ensure that deserving students from marginalized communities are given every opportunity to realize their potential through access to unsurpassed higher education. To ensure complete access, UW President Mark Emmert established the first-of-its-kind Husky Promise guaranteeing full tuition by grant or scholarship support for all admitted low- or lower middle-income undergraduates from Washington. The Husky Promise ensures that the brightest minds are embraced regardless of their financial means.
Seattle Foundation Criteria

• Provides broad access to arts and culture
• Meets the basic needs of residents
• Ensures a vibrant and diversified economy
• Creates quality education and learning opportunities for all ages
• Protects and stewards the natural environment
• Promotes health and wellness
• Fosters strong and connected neighborhoods and communities
UW Botanic Gardens’ Response:

- UW Botanic Gardens hopes to create more educated, inspired, and engaged individuals, families, and communities that are dedicated to sustainable ecosystem management. We strive to educate students and the public, both young and old, about the value of green space, plant collections, horticultural research, and conservation. Students from multiple institutions around the area are utilizing our sites for learning, including South Seattle and Edmonds Community Colleges, and Lake Washington Technical College.
UW Botanic Gardens’ Response

• Our K-8 education programs, held in the Washington Park Arboretum, promote healthy communities by getting kids outdoors in an environment where they learn not just by listening but by touching, investigating, and exploring. These programs emphasize the value of maintaining healthy natural environments and strive to instill a lifelong love of stewardship in participants. We take pride in knowing that we are training the next generation to care for our world.
UW Botanic Gardens’ Response

In addition, our restoration work in the Union Bay Natural Area has changed the face of the northeast corner of the University of Washington campus. Once a landfill, it is now a thriving restored natural area, natural restoration laboratory, publicly accessible wildlife area and an important habitat next to Lake Washington where 200 bird species visit every year. This important clean-up has provided a green space for the public to use and learn from, while connecting with the natural environment.
Part Three – Other Essential Elements

- Measurement – Milestones – Outcomes
- Attachments
- Institutional Documents
- Budgets
- Cover Letters
Budgets

• Direct Costs – personnel, equipment, supplies, travel..
• Indirect Costs – operating expenses and overhead..
• Operating only requests
• Outreach
• Other types of support?
Budgets

• *Expense only vs. budget scenarios that reflect other support (outside and institutional)*

• *Cost-sharing*
Institutional Documents

- Audited Financial Statements
- 501-c-3 Documentation
- Board List
- Diversity Statement
- Institutional Profile
- Fact Sheets
- Letter from President or Provost
Part Four – Bringing it ALL Together

- Don’t Trust Your Own Eyes
- Deadlines and Details
- Common Pitfalls
- Top 10 Tips
Q&A and Sharing
THANK YOU!