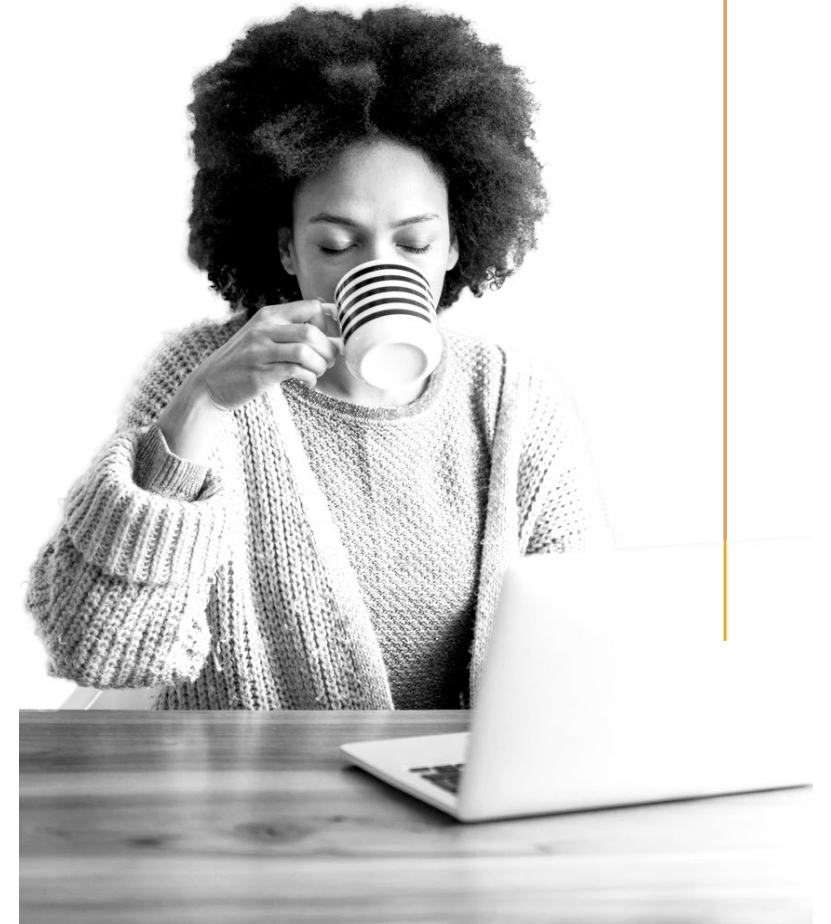# Welcome

We'll be getting started momentarily.

In the meantime, please share in the chat where you are joining from today!

Get comfortable and ready to learn!

Candid.
Learning

Proposal Writing Workshop Part 2

Yes, we are recording today's presentation.

You will receive a link to the recording via email in the next 48 hours.

Presenters

Dave Holmes
Network Engagement Manager
he/him/his

Krista Berry Ortega
Network Engagement Manager
she/her/hers

Candid.

What we do

Every year, millions of nonprofits spend trillions of dollars around the world. Candid finds out where that money comes from, where it goes, and why it matters. Through research, collaboration, and training, Candid connects people who want to change the world to the resources they need to do it.

Our response to global events

Thank you for being a part of Candid's learning community. We recognize that this may be a challenging time for many. Candid has shifted its key learning opportunities to a virtual format, and you can check them out at bit.ly/CandidLearningOnline. We've also invested in providing the social sector with the resources they need to make informed decisions about today's most pressing issues:
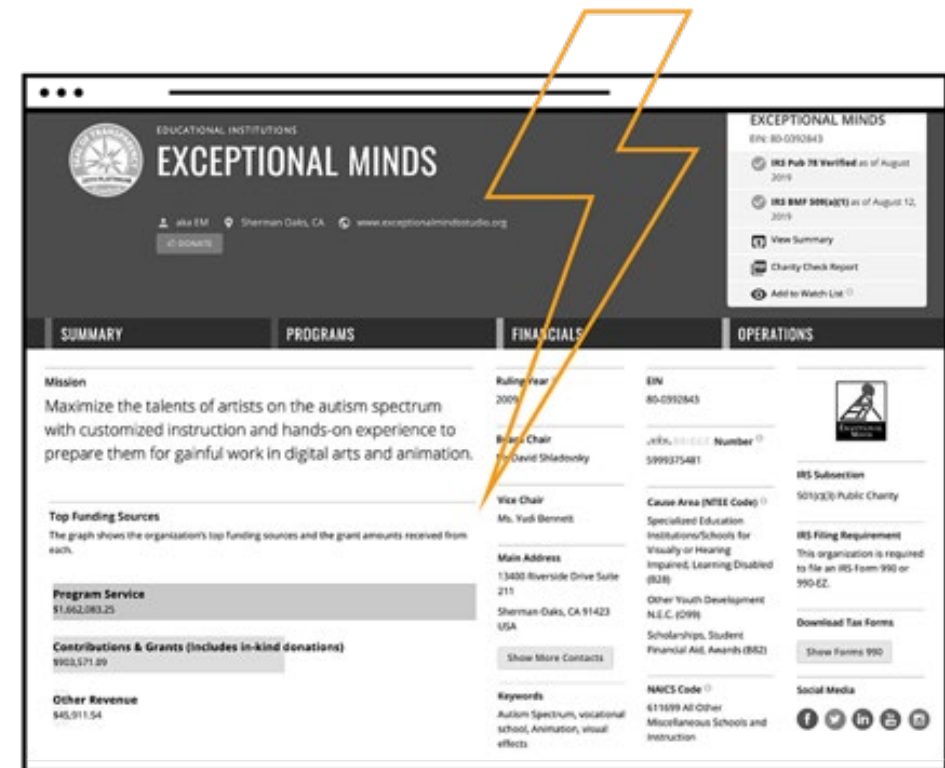
Learn more about COVID-19 resources here: bit.ly/CandidResourcesCOVID19

Learn more about racial equity resources here: bit.ly/CandidRacialEquity
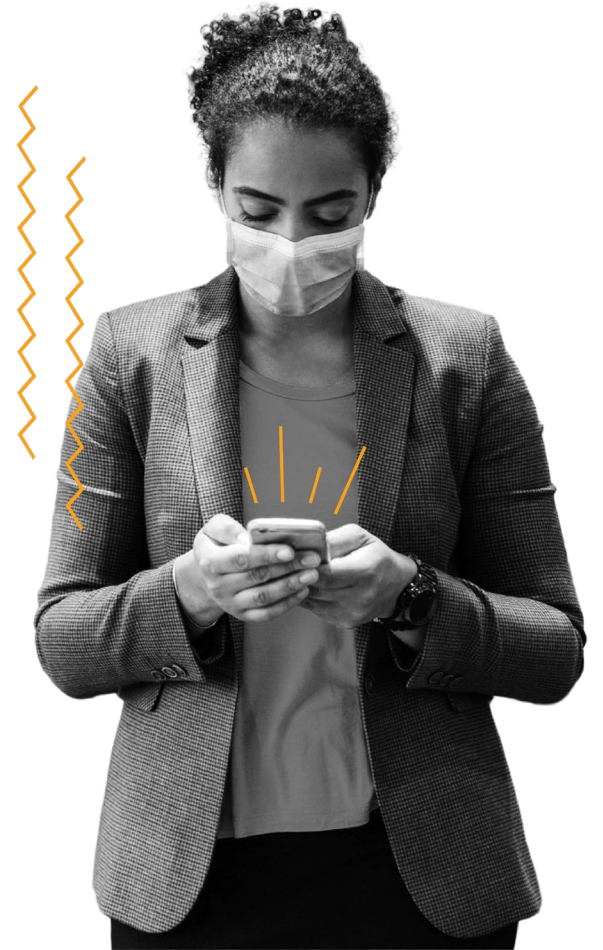
Candid.

Candid Nonprofit Profiles

- Go beyond IRS data
- Provide insights on millions of nonprofits
- Include information from nonprofits themselves, 990s, and other 3rd party sources
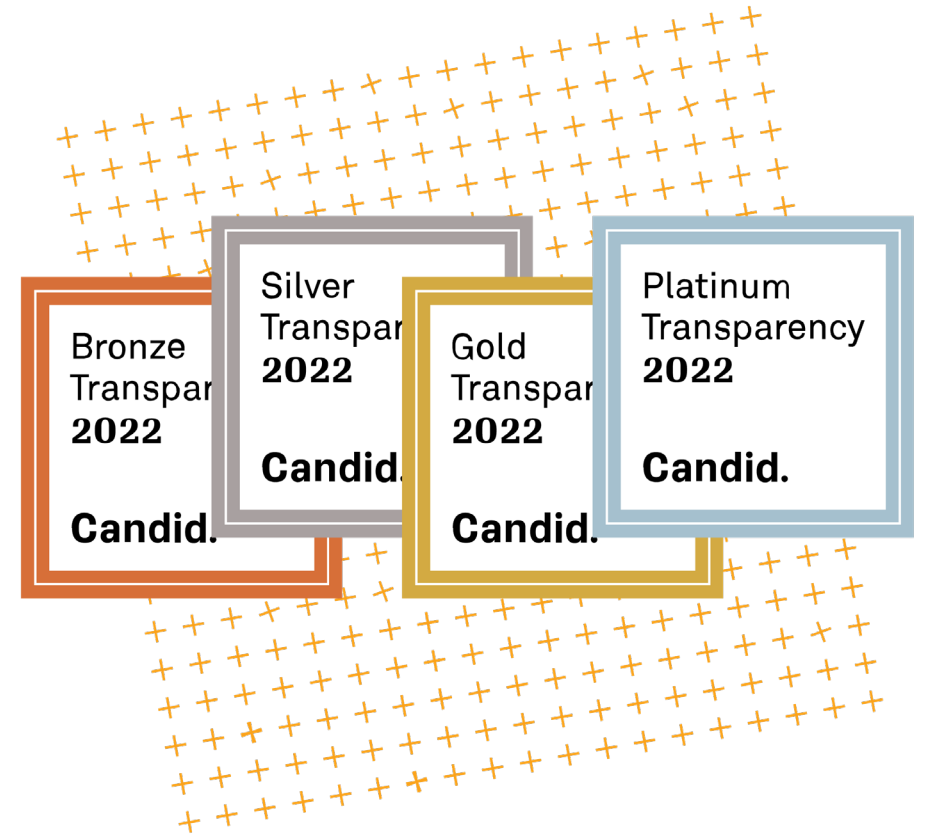
Funders look to Seals to assess potential grantees

Give funders the information they need.

— Creates or enhances online identity (for free)

— Builds trust via transparency

— Increases your visibility on guidestar.org and our 220+ partners

— Saves time — all your most critical information in one place

— Demonstrates your commitment to transparency (share your Seal)

— Share progress and results so you can help combat the Overhead Myth

Find guidance for getting started:
guidestar.candid.org/profile-best-practices/

Bronze Transpar 2022 Candid.

Silver Transpar 2022 Candid.

Gold Transpar 2022 Candid.

Platinum Transparency 2022 Candid.

The Seals of Transparency

Bronze Transparency 2022 — Candid.

Provide basic information to **make sure donors find you**

Silver Transparency 2022 — Candid.

Share program(s) information and brand details to **guide funding decisions**

Gold Transparency 2022 — Candid.

Upload your financial details, board chair name, and leadership demographics to **gain trust and support**

Platinum Transparency 2022 — Candid.

Share your strategic plan, progress, and results to **highlight your impact and boost your funding**

Go for Gold promotion for small nonprofits

For small nonprofits:
<$500K in annual revenue or expenses

If you earn a **2022 Gold Seal** of Transparency this year

You can get a code for a **FREE 1-year subscription to Foundation Directory Essential** to search for potential funders. To get code email goforgold@candid.org

* For qualifying nonprofits

Learn more at bit.ly/goforgold2022

Proposal Writing Workshop Part 2

Upon completion of this training, you should be able to:

- Write a grant proposal for your own project

- Create a basic budget to use in your grant proposal

- Find potential grant funders for your proposal using *Foundation Directory*

- Learn what grant funders want in a proposal and the biggest red flags from their perspective.

Review

- Did you complete the outline?

- What questions did you have?

Components of a project budget

The budget

Your proposal describes your project in narrative form and your budget explains your project in financial terms.

Components of a project budget

Income

- Support
  - Grants
  - Contributions
- Earned income
  - Fees for services
  - Sales of goods

Expenses

- Direct costs
  - Personnel
  - Non-personnel
- Indirect costs (overhead)

Showing your expenses

Expenses

- Direct costs
  - Personnel
  - Non-personnel
- Indirect costs (overhead)

Personnel costs

Personnel Costs			
Executive director			$ --
Program director			
Program assistant			
Tutors			
		Sub-total	$ --
		Fringe benefit rate	$ --
		Personnel total	$ --

Who are all the individuals working on the project?

What are the amounts for salary and wages?

How much time will they dedicate to the project?

How much do we add for benefits?

Personnel costs

Personnel costs		
Executive director		$ --
Program director		$ --
Program assistant		$ --
Tutors		$ --
	Sub-total	$ 100,000
	Fringe benefit rate	
	Personnel total	

Non-personnel costs

Non-personnel costs		
Consultants		$ --
Supplies/Materials		$ --
Printing		$ --
Postage		$ --
Travel		$ --
Food/Beverage		$ --
Program equipment		$ --
Program space/Rent		$ --
Program evaluation		$ --
	Non-Personnel Total	$ --

Who are the other people working on this project?

What would this include?

Overhead rate %

Direct program costs (example)
- Adult services program...$200,000
- Children's program.......................................$300,000

Total direct costs....................................$500,000

Indirect program costs

Total indirect costs.................................$100,000

Indirect cost rate = Total indirect costs/Total direct costs
$100,000/$500,000 = 20%

Direct Expenses

Overhead

- Rent/Utilities
- Telephone/Internet
- Office supplies
- Marketing/Communications
- Administrative staff
- Fundraising

Showing your income

Income

- Support
  - Grants
  - Contributions
- Earned income
  - Fees for services
  - Sales of goods
- In-kind contributions

Showing your income

Grants/Contributions		
	Government	$ --
	Foundations	$ --
	Corporations	$ --
	Individuals	$ --
	Federated giving programs	$ --
Earned income		
	Events	$ --
	Publications and products	$ --
	Fees	$ --
Membership/Dues		$ --
In-kind support		$ --
	Total income	$ --

In-kind support

- Do you receive any in-kind support?

- If you do – ex: donated space for your program or volunteer time – it should be listed as both an expense and as income

Finding funders

Find the funders who...

- fund in my area of interest

- care about the people I serve

- fund in my geographic region

- provide the type of support I need

- have funded organizations like mine

- have given amounts in the range I need

Prospect research through 990s is time consuming

Save time and win funding with *Foundation Directory*.

– Build and refine prospect lists by knowing
how much a funder supports your mission

– Find connections with key decision-makers

– Influence prospecting strategies with
Recipient profiles

Get valuable insights you need to succeed.
Learn more: fdo.org/guide

Funders look to Seals to assess potential grantees

Give funders the information they need.

– It's free to earn a Seal of Transparency

– Your information powers giving platforms like AmazonSmile and Facebook

– Earning Bronze will enable you to add a Donation button to your profile

Find guidance for getting started:
learn.guidestar.org/profile-best-practices

Where to freely access *Foundation Directory*

Visit or contact our Funding Information Network Partners:

learning.candid.org/ find-us/

Before applying: Introductory call

Before submitting the proposal:

- Show you've done your homework

- Be prepared to discuss the project and guidelines

- Communicate how much you need

- Clarify submission questions

What do funders look for in a request?

Make your proposal more competitive!

- Tell a compelling story.
- Keep language clear and simple.
- Say it like you mean it—with energy and commitment. This is not a dry report.
- Don't be vague—who do you really work with?
- What will show success? Make it clear and comprehensive—have a well-thought-out plan/outline.
- Is it realistic? Can you deliver what you promise? Can you pay for it?

And don't forget…

- Talk about how this will be a mutually beneficial partnership—a win/win for both parties.
- Connect to the foundation's priorities—but don't change who you are to do so!
- Avoid jargon and acronyms—explain things.
- Follow the guidelines of the funder—and answer the questions the funder asks.
- Use white space.
- Give it to someone else to read!

Exercise

Review a sample LOI
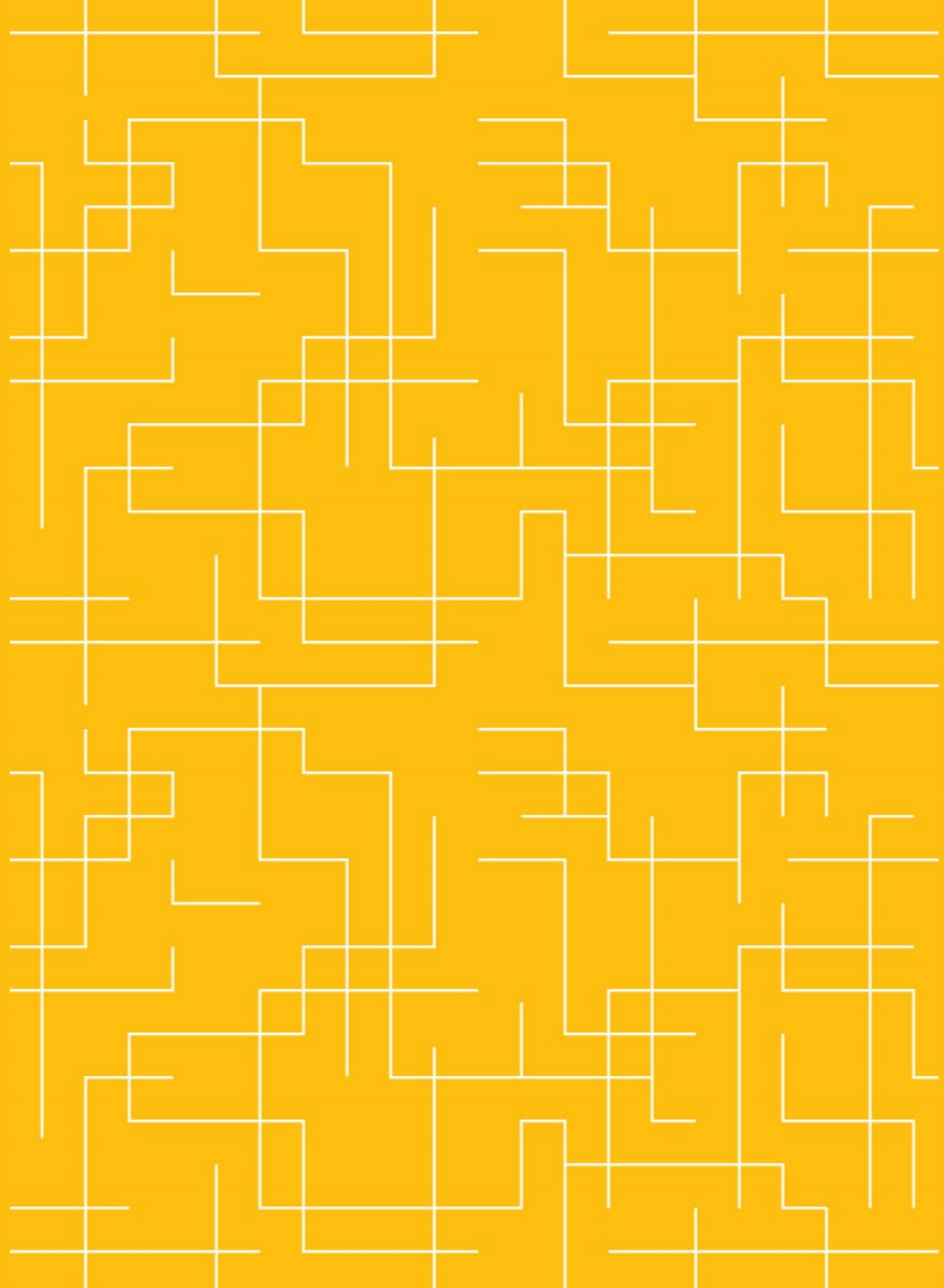
Questions?

What's next?

Introduction to Individual Giving

April 21, 2022

10 – 11:30am PT

https://www.eventbrite.com/e/269154236567

How did we do?

Your feedback is important to us!
Please take a moment to fill out our
course survey:

http://bit.ly/CandidPWW

Thank you

Stay connected and never miss a virtual training by subscribing to our Candid Learning newsletter
bit.ly/CandidLearningNewsletter