

Community-Based Organizations Developing & Sustaining Effective Partnerships

Developing Effective Proposals

Mini-Workshop

Wednesday, July 6th

La Joie de Vivre Centre

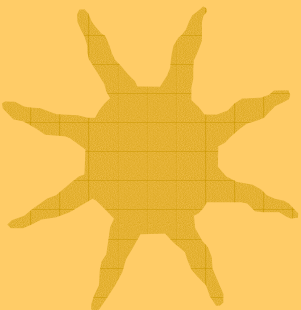
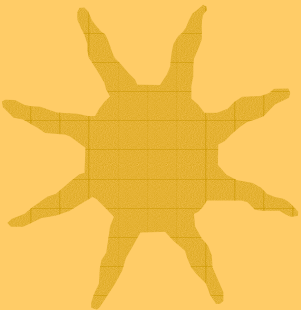
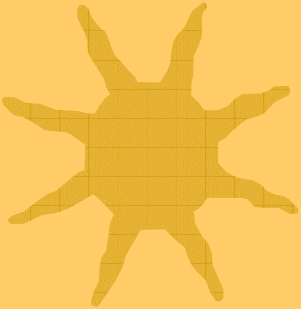
Calgary

Sponsored by the Calgary Urban Aboriginal Initiative



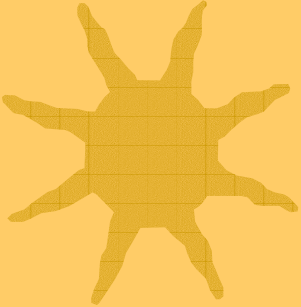
Objectives of Today's Workshop

1. To explore key themes for CBOs interested in developing effective proposals:
 - Key Elements of a Good Proposal
 - Stages of Proposal Development
 - The Top Six Challenge in Creating Effective Proposals and How to Deal With Them
2. To share existing knowledge and resources (e.g. tools, case studies, training) to support proposal development efforts.
3. To identify how existing resources to support proposal development efforts can be strengthened to better reflect the needs and priorities of urban Aboriginal CBOs.

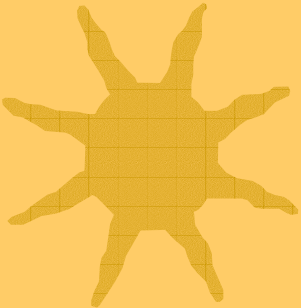




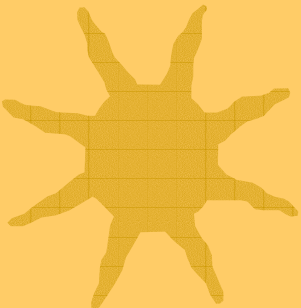
The Approach for Today



★ Two conversations.



★ A Case Study.

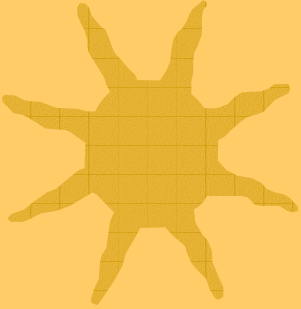


★ A review of the general experience of proposal development.

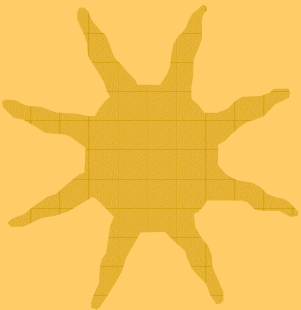
★ A chat about where to go from here.



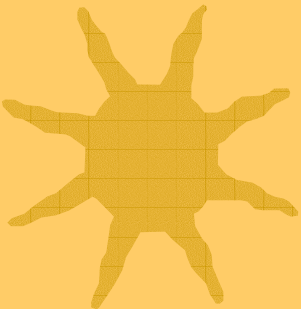
Questions for Conversation #1



★ In your opinion, what are three reasons to develop a proposal?



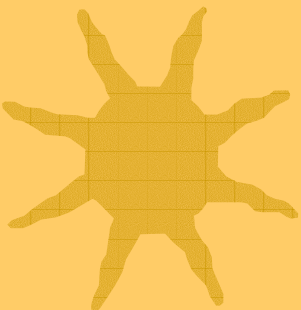
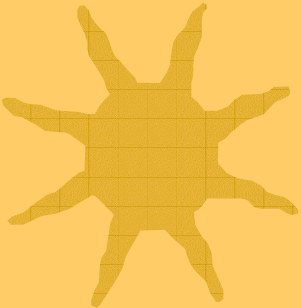
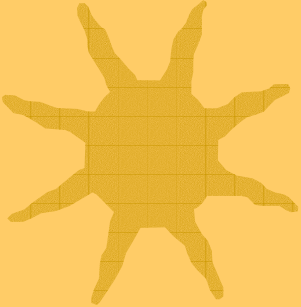
★ In your opinion, what are the ingredients of an effective proposal?



★ In your opinion, what are the major challenges CBOs experience in developing effective proposals?



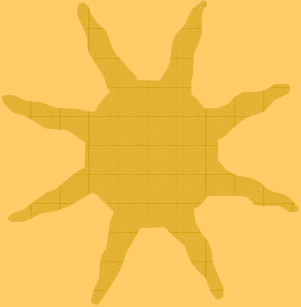
The Reasons for Developing a Proposal – Key Findings



- ★ To communicate to your prospective funding partners what it is your group plans to do and how they might be involved.
- ★ To help your own organization(s) clarify what it is it seeks out of a partnership and to identify ways it can strengthen its proposal or own capacity to undertake the proposal.
- ★ To engage prospective partners in a process of exploring how they might work together.

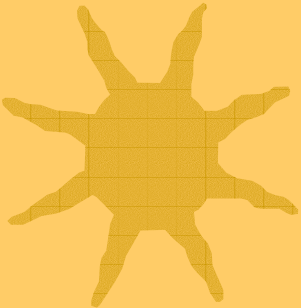


The Ingredients – Key Findings



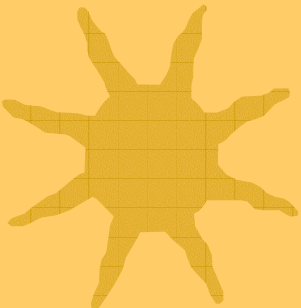
The Minimum: The Package

- ★ A well-packaged proposal.



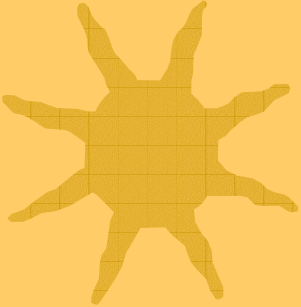
The Ideal: A Process for Getting The Package

- ★ Submitting to the “right” prospective funding partners.
- ★ Strong relationships with prospective funding partners.

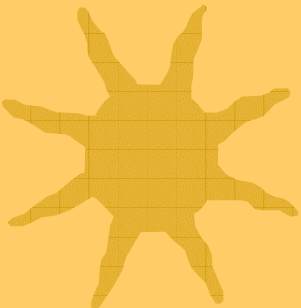
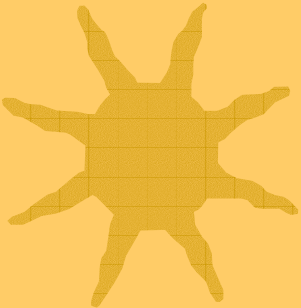




The Minimum: A Well Packaged Proposal

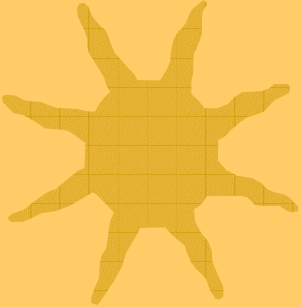


- ★ Cover Letter
- ★ Executive Summary
- ★ The Needs Statement/Definition of Issues
- ★ Organizational Background
- ★ Clear Goals and Objectives/Results
- ★ Methods
- ★ Evaluation
- ★ Budget/Resources
- ★ Sustainability Strategy

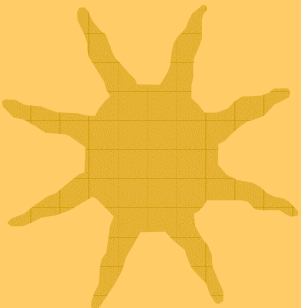
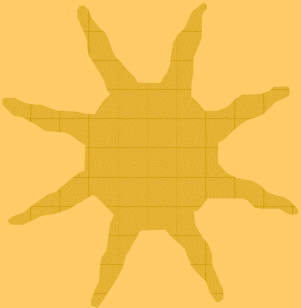




The Challenges – Key Findings

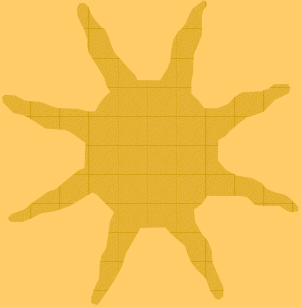


1. Establishing an effective needs or problem statement.
2. Clarifying outcomes.
3. Balancing “fit” between funder and community group priorities.
4. Creating a realistic sustainability plan.
5. Capturing, sharing results and learning from results.
6. Developing relationships with prospective funding partners.



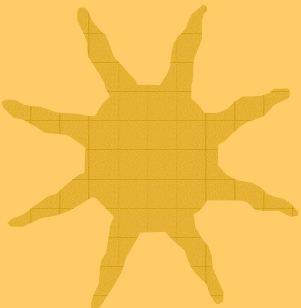


What Different Partners Want to See – Key Findings



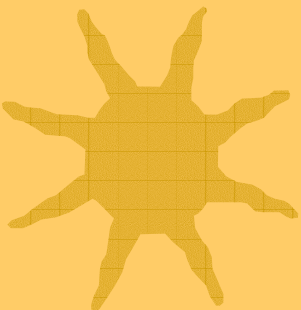
★ Government Agencies

- Broader partnerships
- Appropriate “submitting” organizations



★ Corporations

- Recognition strategy
- Win/Win Partnerships
- Exclusivity
- Information on key staff.



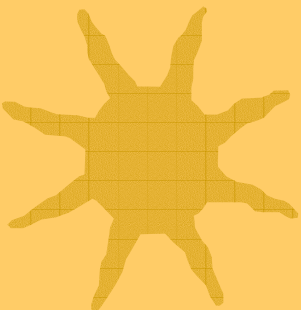
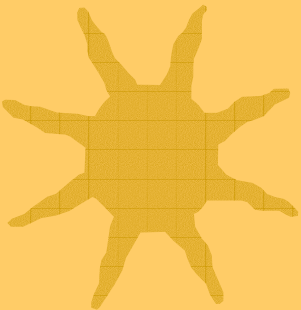
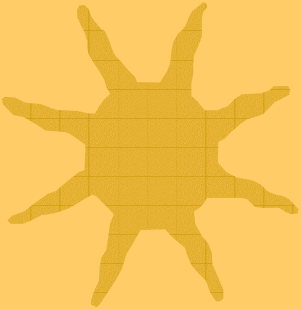
★ Foundations

- Innovation
- Leverage or Big Change
- Dissemination Strategy



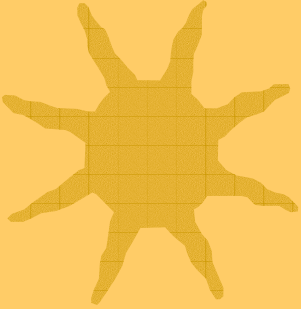
Four “Have To Do” Hints

- ★ Be sure there is strategic fit between your proposal and your prospective funding partner.
- ★ Ensure you know the precise proposal format the organization to which you are submitting the proposal.
- ★ Have others provide feedback on your proposal before you submit.
- ★ Hire a proposal writer or editor to “support” – not replace – you in packaging the proposal.

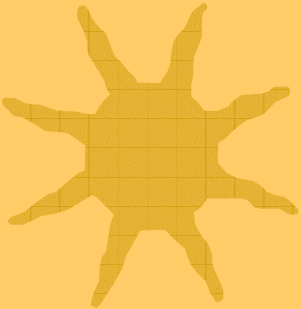




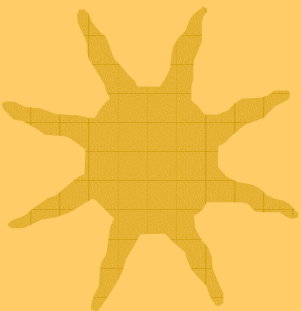
Exercise – Case Study



- ★ Put yourself in the shoes of grant review team of the We Care Foundation and review a proposal with their rating sheet.



- ★ Explore the following questions with the group:
 - Does the proposal feel any different looking at it from the perspective of a funder?
 - How might looking at it from a funder's perspective change the way you will develop a proposal?

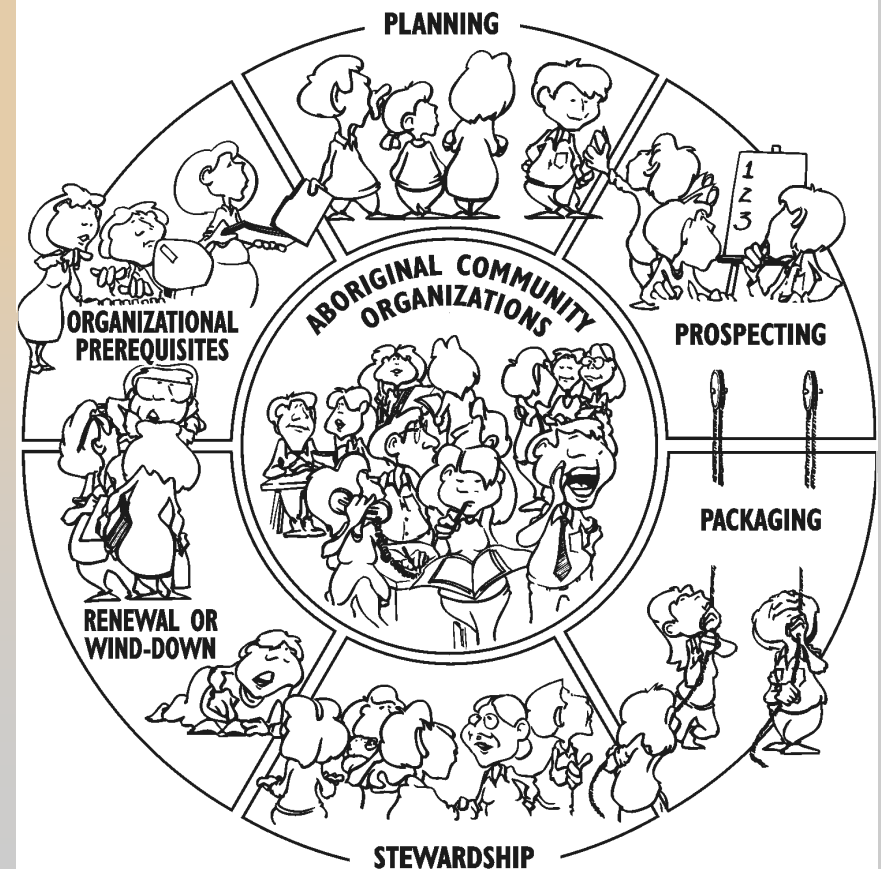




The Ideal: A Process for Getting There

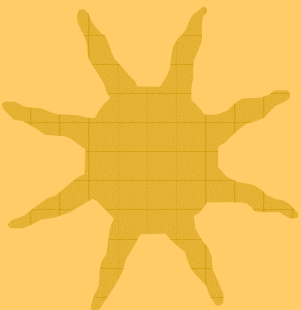
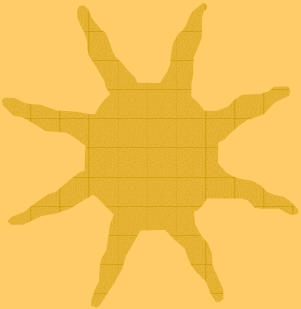
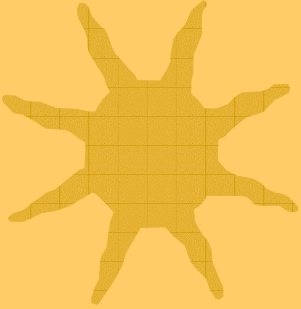
- ★ Proposal development as part of a broader partnership development process

Developing & Sustaining Partnerships





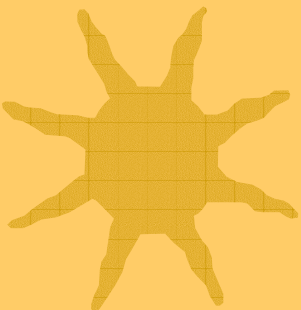
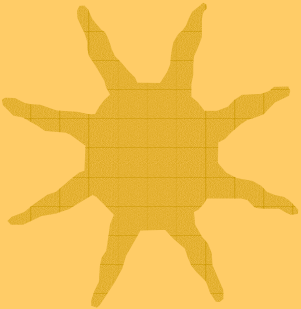
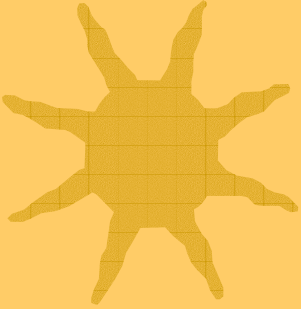
The Stages of Developing Proposal – Key Findings



1. **ORGANIZATIONAL PRE-REQUISITES:** Assessing and strengthening your group's core capacity.
2. **PLANNING:** Developing a clear program or initiative.
3. **PROSPECTING:** Thoroughly researching prospective funding partners, building a relationship with prospective funding partners, adapting program plan – if appropriate – to ensure better “fit” with funder priorities.
4. **PACKAGING:** Writing, packaging the proposal, and submitting the proposal.
5. **STEWARDSHIP:** Continual contact, monitoring progress, and reports.
6. **RENEWAL/WIND-DOWN:** Renew or grow the relationship, or wind it down.



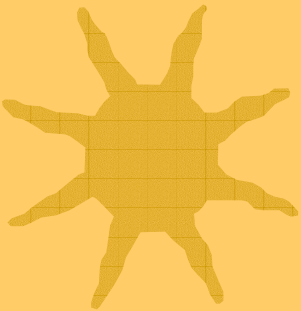
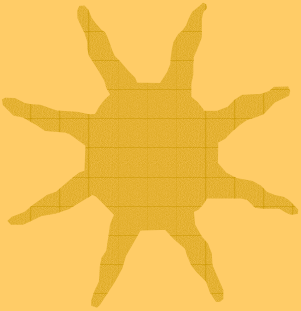
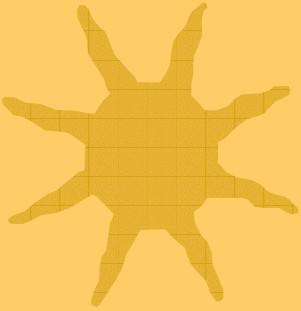
The Catch 22



- ★ The organizations that might most benefit from partnerships and resources often have the least capacity (time, energy, experience) to go through a thorough partnership development process.



Questions for Conversation #3



- ★ To what extent does this process reflect your current process for developing partnerships and proposals.
- ★ Imagine again that you are on the We Care Foundation and reviewed a proposal after a group had gone through this process. How would it affect your final decision?
- ★ What are the implications for the way you approach the proposal development process?



Practical Resources

– Proposal Writing Websites

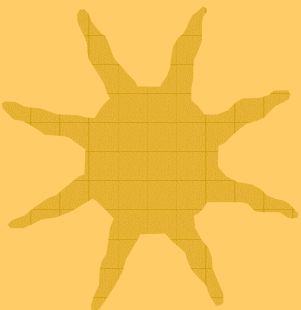
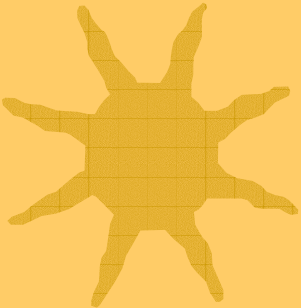
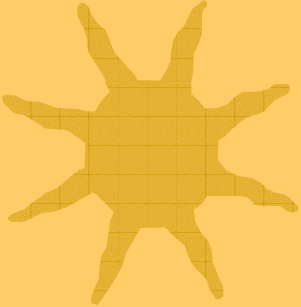
- Page 22 of Strategies for Effective Proposal Writing Guide. Ontario Healthy Communities Coalition.

– Proposal Writing Guides

- Strategies for Effective Proposal Writing (Ontario Healthy Communities Coalition)
- Winning Grants: Step by Step. Mim Carlson.
- Building Foundation Partnerships: Basics of Foundation Fundraising and Proposal Writing. Canadian Centre for Philanthropy.
- Creating Effective Partnerships with Business: A Guide for Charities and Non-Profits in Canada. Canadian Centre for Philanthropy.



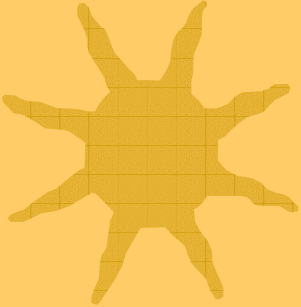
Questions for Conversation #3



- ★ In your opinion, how can the existing resources to support partnership and proposal development (e.g. guides, training, coaching/technical support) be strengthened to better support the needs and priorities of people in community-based organizations?
- ★ Are there any obvious things CUIAI could do about this in Calgary?

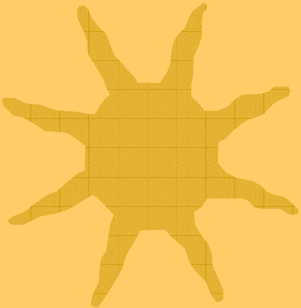


Reflecting on the Morning

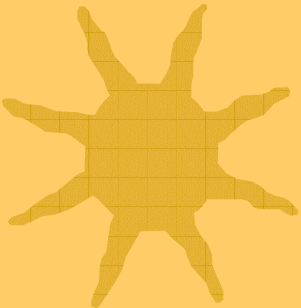


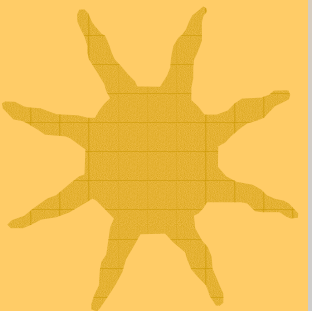
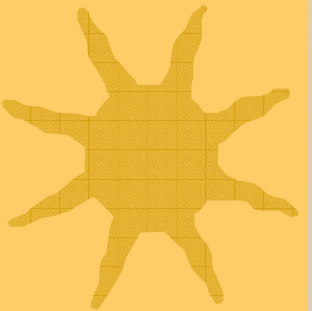
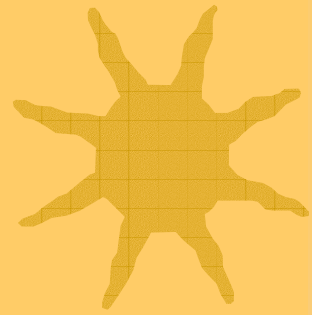
★ Check Out

- What is different for you after this morning's session?
- What “aha's” have you had? What new questions were raised?



★ Evaluation Form





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