

Foundations 101

Training – Proposal Writing and Budgeting Training

Development and Alumni Relations

Institutional Giving – Institutional Stewardship



**HOWARD
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Meet the Team

Dawn Goodman, Executive Director



Akilah Hewitt, Grant Writer



Ashanti White, Grant Writer



Purpose of Institutional Giving – We are different from the Sponsored Programs Office (SPO)

DAR-IG focuses on foundation and corporate grants

SPO focuses on research-based grants



Working with DAR

Submit an intake form to our ticketing system for all grant related needs.

What we do:

- Proposal development and submission
- Reporting (annual, impact)
- Budget review and revision
- Compliance and data integration
- Project management coaching



Foundation vs Corporate Grants

- **Foundations: mission-driven**
- **Corporations: business-aligned philanthropy**
- **Both require proposals and reporting**



Identifying Funding

- **Candid (Foundation Directory Online)**
- **Pivot**
- **Instrumentl**
- **GrantStation**
- **Philanthropy News Digest**



Let's use Candid



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Example

Candid.

Foundation Directory

Help ▾ Chat 

ProfessionalFind fundingMy FDO ▾Resources

Find Funding

Advanced Search & Filters

Scholarships for students in Engineering

SEARCH

☐  Include U.S. Federal Funders

☐  Include grants to individuals

 Search by Organization

 Search by Person

Candid.

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Data Sources

Terms of Service

HELP

Contact Support

Candid Learning Resources

Help Guide

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Go to the Candid Foundation Directory home page to search for grants



Example

Foundation Directory

Help ▾

Chat



Professional

Find funding

My FDO ▾

Resources

Find Funding > Search Results

Find Funding

SHOWING RESULTS FOR Engineering🔍, Scholarships🔍 ✕ CLEAR ALL ⚙ EDIT 📌 SAVE

Advanced Search & Filters

Scholarships for students in Engineering

SEARCH

☐ Include U.S. Federal Funders

☐ Include grants to individuals

Search by Organization Search by Person

1,278
Grantmakers
▼

View Grantmakers Only

4,513
Grants
▼

View Grants Only

1,068
Recipients
▼

View Recipients Only

1,231
990 Tax Forms
▼

View 990 Tax Forms Only

Total Dollar Value of Grants: \$303,316,793



Example

Grantmaker Profiles

Gain valuable insights about prospective funders on Grantmaker Profile pages. The menu allows you to jump directly to any section of the profile.

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 MENU

Profile Last Updated: 01/16/2026 Grant Information Last Updated: 01/16/2026

[Help](#) ▾[Chat](#)[Find funding](#)[My FDO](#) ▾[Resources](#)[Grantmaker Search Results](#) > [Grantmaker Record](#)[← Previous Record](#)[Next Record →](#)[TOOLS](#)

Broadhurst Foundation

Tulsa, OK, United States | [Who's Who](#) | [+ Contact Info](#)

 [IS THIS A GOOD PROSPECT? ASSESS THIS GRANTMAKER](#)



Example

Candid.

Foundation Directory

Professional

[Find Funding](#) > [Search Results](#) > [Grantmaker Search Results](#) > [Grantmaker Record](#)



Profile Last Updated: 01/16/2026 Grant Information Last Updated: 01/16/2026

The Basics

The most basic information about the funder including their office location plus links to their website, LinkedIn page, staff listing and full contact info. Look for the eReporter logo to identify funders reporting directly to Candid. Their grants will be more recent.

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TOOLS



Broadhurst Foundation

Tulsa, OK, United States | [Who's Who](#) | [+ Contact Info](#)



[IS THIS A GOOD PROSPECT? ASSESS THIS GRANTMAKER](#)



Example

Foundation Directory

Help ▾

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Professional

Find funding My FDO ▾ Resources

Find Funding > Search Results > Grantmaker Search Results > Grantmaker Record

← Previous Record Next Record →

TOOLS PDF Email Share Star Bell

Profile Last Updated: 01/16/2026 Grant Information Last Updated: 01/16/2026

Funder Assessments

Funders will appear in multiple searches. Completing a Funder Assessment is a great way to keep track of whether you think they're a good prospect. Click here to get started and next time you review this profile, you'll see how you've rated them. You can always edit it later if circumstances change!

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 IS THIS A GOOD PROSPECT? ASSESS THIS GRANTMAKER



Example

The Overview

Need a quick summary of the organization's last 5 years of giving? Use these charts to understand how and where the grantmaker spends its money. Professional subscribers may click on each chart to see more details.

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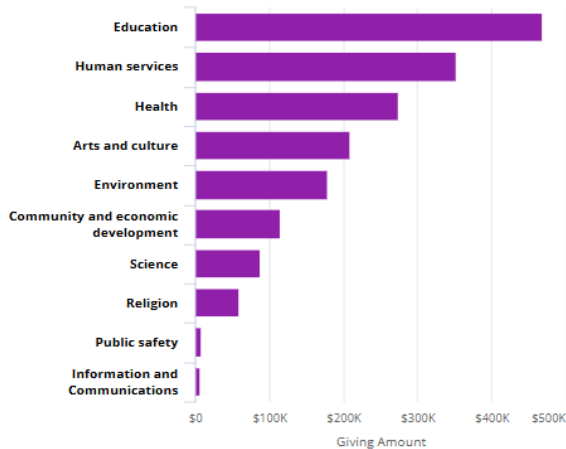
Next »

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Broadhurst Foundation Most Recent 5 Years At A Glance

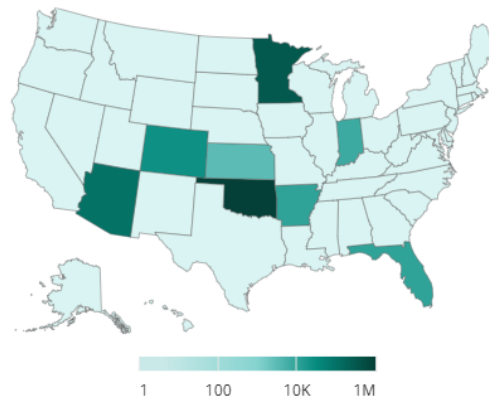
They've funded 68 grants to 40 organizations totaling \$1,403,700

What Is Being Funded?



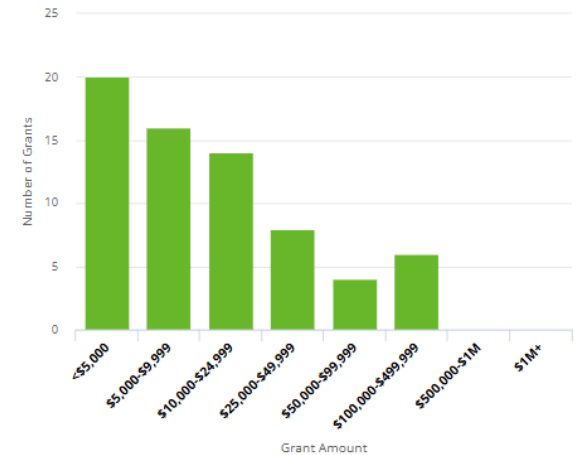
View Each Subject with More Detail

Where Is The Money Going?



View Each State with More Detail

How Big Are The Grants?



View Each Grant with More Detail

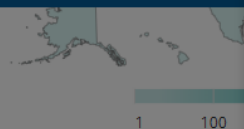


Example

Broadhurst Foundation



View Each Subject with More Detail



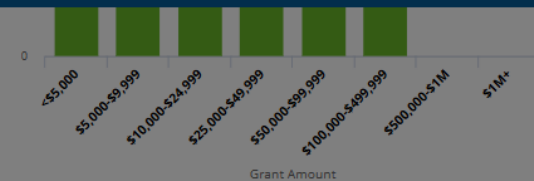
View Each State

The Details Are in The Grants

Grants lists are available for Professional subscribers and allow you to view grants awarded and grant details. Grant lists are organized by year and grant amount in descending order. You can sort by clicking on any column header. Click on any line to see the full grant description.

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View Each Grant with More Detail

GRANTS

FUNDING INTERESTS

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OTHER FUNDERS TO CONSIDER

Based on similar patterns of giving

APPLICATIONS/RFPs

and Giving Limitations

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for fiscal year 2024, 990s

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Grants

MOST COMMON GRANT AMOUNT: \$3,000

SHOWING GRANTS FOR "Engineering, Scholarships" Clear search filters to see all grants

Recipient	Recipient City	Recipient State	Recipient Country	Primary Subject	Year	Grant Amount
John Brown University Silver	Siloam Springs	AR	United States	Engineering	2020	\$10,000
Oklahoma City University	Oklahoma City	OK	United States	Engineering	2020	\$10,000
Southern Nazarene University	Bethany	OK	United States	Engineering	2020	\$7,500
Depauw University	Greencastle	IN	United States	Engineering	2020	\$7,000
University of Tulsa	Tulsa	OK	United States	Engineering	2020	\$6,000

« 1 2 3 4 5 6 7 8 9 10 » Showing 1-5 of 73 Results

VIEW ALL

View All to Print · Export · Email



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\$6,000

[View All to Print](#) · [Export](#) · [Email](#)

^

Cash grants



Example

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Based on similar patterns of giving

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About

Purpose and Activities ^

Support for scholarship funds for students training for the Christian ministry

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Background v

Other Funders to Consider

A list of funders with similar priorities and patterns of giving, based on subject, geographic area of interest, and dollar amount of grants. Click on their names to view their profiles.

💡 *Expert tip: This list is specific to the overall profile of a funder and not specific search criteria.*

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grants also for human services, youth services and for health care

Other Funders to Consider

Based on similar patterns of giving (subject area, geographic area served and grant amounts)

Helmerich Trust

Tulsa, OK

Education, Community Development, Arts and Culture, Health, Human Services

Sam Viersen Family Foundation, Inc.

Tulsa, OK

Education, Community Development, Health, Arts and Culture, Employment

Moran Family Foundation

Tulsa, OK

Community Development, Education, Health, Animals/Wildlife, Arts and Culture

Waters Charitable Foundation

Tulsa, OK

Community Development, Health, Education, Human Services, Medical Research

Ruth Nelson Family Foundation

Tulsa, OK

Community Development, Education, Health, Arts and Culture, Animals/Wildlife

John Steele Zink Foundation

Tulsa, OK

Arts and Culture, Community Development, Education, Health, Environment



Example

Broadhurst Foundation

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Helmerich Trust

Tulsa, OK

Education, Community Development, Arts and Culture, Health, Human Services

Waters Charitable Foundation

Tulsa, OK

Community Development, Health, Education, Human Services, Medical Research

Sam Viersen Family Foundation, Inc.

Tulsa, OK

Education, Community Development, Arts and Culture, Health, Human Services

Ruth N. Viersen Foundation

Tulsa, OK

Community Development, Health, Education, Human Services, Medical Research

Moran Family Foundation

Tulsa, OK

Community Development, Education, Health, Animals/Wildlife, Arts and Culture

John Steele Zink Foundation

Tulsa, OK

Arts and Culture, Community Development, Education, Health, Environment

How to Apply

Applications/RFPs includes application guidelines, requests for proposals (RFPs), deadlines, giving limitations, and whether unsolicited applications are accepted.

💡 *Expert tip: If unsolicited applications are not accepted, go to the Who's Who section and start networking!*

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Applications/RFPs



Application form required.

Applicants should submit the following:

1. Detailed description of project and amount of funding requested

Initial Approach: Proposal

Copies of proposal: 1

Board meeting date(s): Quarterly

Final notification: 1 month



Example

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FOR FISCAL YEAR ENDED 2024-12-31

\$9,711,672
TOTAL ASSETS

Gifts Received: N/A

Expenditures: \$566,785

Qualifying Distributions: \$336,151

Giving Activities include:

\$284,600 for grants

\$284,600

How to Make Connections

Who's Who - Click on the LinkedIn icon to see if you have any connections to this funder. Introductions are one of the most effective ways to get on a funder's radar.

Note: Must be logged in to your LinkedIn account.

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990 FORMS

View 990: 2023

GO

[Learn more](#) about the information displayed in Forms 990 and 990-PF, as well as processing errors announced by the IRS.

Who's Who



Officers (1) ^

Ann S Cassidy
Chairman

HIDE ^





When reviewing an application, what does a foundation often look at first?

Budget and Budget Narrative!

Foundations are looking to see how your program is designed based on the story that your budget and budget narrative tells.



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Budget Terminology

Important: Project/Program budget will always be larger than the request budget.

Project/Program Budget: Budget that outlines all costs required to implement a project.

Request Budget: Budget that outlines costs that the foundation will cover.

Multi-line Budget: A budget that shows project budget and request budget side by side.



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Budget Terminology

Budget Narrative: Breakdown of costs through mathematical illustration. Goal is to show that the program has clearly defined and reasonable costs.

Costs breakdown at minimum should show: Brief name of item, the cost per item, and how many.

Example: Math books at \$10.00 per book x 10 books= \$100.00



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Internal Budget Terminology

Fringe Rate: benefits supplementing an employee's salary. Howard's fringe rate is 27.4% for full time staff and 7.0% for part time staff.

Indirect Costs: expenses of doing business that are not readily identified with a particular grant, contract, project function or activity, but are necessary for the general operation of the organization and the conduct of activities it performs.





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Best Practices

Think like a funder!



Alignment!
Narrative,
Budget, and
Budget
narrative
must tell the
same story!

Cost should
be real and
reasonable!

Details matter!

Check your
math!

Test Your Knowledge



Be the Funder!

Purpose of Exercise: Find **eleven** common errors that funders would flag as part of budget and budget narrative review.

Your goal is to review the foundation summary, the organization summary, and the proposal executive summary and use that information to inform your review of the budget and budget narrative to uncover eleven errors.

Highlight the errors on the budget/budget narrative with a note about what the error is.

Hint: Use the best practices to guide your review!



Fuzzy Friends Foundation: a private foundation offering grants to organizations that support the wellness and conservation of exotic mammals, particularly those identified on the endangered species list. They provide grants up to \$25,000 to organizations working to improve the health and survival of endangered wildlife.

Mei Xiang Wildlife Organization: a nonprofit established in 2011 with a mission of promoting and leading conservation efforts for giant panda and red panda species. The organization has three goals: 1) preserve the species and natural habitats of pandas, 2) help pandas develop the skills necessary to survive in their natural habitat, and 3) strengthen the larger ecosystems pandas live within.



Proposal Executive Summary: At Mei Xiang Wildlife Organization, we believe all pandas deserve to live healthy, secure lives in their natural environments. We respectfully request support from the Fuzzy Friends Foundation for our flagship Panda Play program, which supports the healthy development of endangered red pandas and teaches them the survival skills necessary to return to their natural habitats. The program is designed to help pandas achieve physical milestones and instinctual skills that are otherwise under-developed in traditional zoo settings and includes custom exercise equipment to help pandas learn how to safely climb and explore unfamiliar terrains. Our outcomes are measured through individual panda fitness and wildlife-readiness goals, which are tracked in our PawPrints data collection and analysis software. The Panda Play program will serve five red pandas over the next fiscal year, with a goal of 100% of pandas served ready to return to their natural habitats by the end of the grant period.

Our program is led by program manager Marlon Perkins and program coordinator Caroline Seitz, who both have decades of experience protecting wildlife and supporting positive outcomes for endangered species. The program is also supported by 50 volunteers annually, who help with day-to-day maintenance of the Panda Play activity areas and ensure all fitness and milestone benchmarks are entered into our PawPrints data software. Our team uses a Positive Panda Development (PPD) approach to ensure we address the specific needs of each panda; adapting Panda Play program activities to meet each bear's unique needs and challenges.



Mei Xiang Wildlife Organization
Panda Play Program Budget for Fiscal Year 2026
Application to the Fuzzy Friends Foundation

Panda Play Program Revenue		
Funder	Amount Pending	Amount Committed
Polka-Dot Enthusiasts Club	\$ -	\$ 250,000
Anti-Polar Bear Action League	\$ -	\$ 75,000
Fuzzy Friends Foundation	\$ 30,000	\$ -
Total Revenue	\$	\$355,000

Line Item/Category		Program Budget	Requested Amount	Budget Narrative
Personnel & Benefits				
Position	Staff Member	Total Cost	Foundation Request	Cost Justification and Calculation
Panda Play program manager	Marlon Perkins	\$ 75,000	\$ 5,000	Oversees day-to-day operations of the Panda Play program and provides supervision to the program coordinator. Total cost calculated at \$75,000 annual salary x 45% FTE = \$33,750. Of this total cost, the Mei Xiang Wildlife Organization is requesting \$5,000
Panda Play program leader	Caroline Seitz	\$ 55,000	\$ 2,000	Oversees day-to-day implementation of the Panda Play program. Total cost calculated at \$55,000 annual salary x 100% FTE = \$55,000. Of this total cost, the Mei Xiang Wildlife Organization is requesting \$2,000
Panda Play teaching specialist	Steve Irwin	\$ 45,000	\$ 5,000	Oversees design of fitness routines for the Panda Play program. Total cost calculated at \$45,000 annual salary x 100% FTE = \$45,000. Of this total cost, the Mei Xiang Wildlife Organization is requesting \$5,000
Total Personnel		\$175,000	\$12,000	
Fringe Benefits (@20.29%)		\$35,508	\$2,352	Fringe benefits cover FICA, workers compensation, unemployment, health insurance, and retirement, calculated at 20.6% of total salaries.
Total Personnel & Benefits		\$210,508	\$14,352	
Other Expenses				
Line Item	Total Cost	Foundation Request	Cost Justification and Calculation	
Panda food/snacks	\$ 745	\$ -	Includes healthy snacks for pandas in our programs, to ensure they have access to nutritious bamboo during program activities. Total cost calculated at \$160 per panda x five pandas served = \$745. The Mei Xiang Wildlife Organization is not requesting any funds for this line item.	
Panda Play program exercise equipment	\$ 25,000	\$ 5,000	Includes cost of installing new developmentally-appropriate play structures for pandas to climb and swing on, which helps pandas build the survival skills necessary to re-integrate into their natural habitats.	
Staff Travel	\$ 9,825	\$ 3,000	Includes cost of staff travel to the National Exotic Slugs Wildlife Convening, which will improve staff knowledge of other creatures served by the the Mei Xiang Wildlife Organization's conservation efforts. Total cost calculated at \$265 for convening registration + \$1,000 for round-trip travel + \$1,500 for lodging for one week + \$510 for meals and incidentals for one week = \$3,275 x three staff = \$9,825. Of this total cost, the Mei Xiang Wildlife Organization is requesting \$3,000	
Staff Training	\$ 3,000	\$ -	The Mei Xiang Wildlife Organization is not requesting funds for this line item.	
Panda Play program Volunteer Incentives	\$ 3,374	\$ 1,743	Includes gift card incentives to encourage volunteers to complete 100 hours of service at the Panda Play program. Total cost calculated at \$67.48 per gift card x 50 volunteers annually = \$3,374. Of this total cost, the Mei Xiang Wildlife Organization is requesting \$1,743 for this line item.	
PawPrints Software Subscriptions	\$ 500	\$ 1,200	Includes annual subscription costs for our PawPrints data collection and evaluation software, to ensure we track all outcomes related to the Panda Play program. Request calculated at \$400 per subscription per staff per year x three staff = \$1,200	
Total Other Expenses		\$ 42,444	\$ 10,943	
Total Direct Costs		\$ 252,952	\$ 25,295	
Indirect Costs		\$ 47,049	\$ 4,705	Calculated at Mei Xiang Wildlife Organization's US HHS-approved rate of 18.6%
Total Budget		\$ 300,000	\$ 30,000	

Revenue

Panda Play Program Revenue		
Funder	Amount Pending	Amount Committed
Polka-Dot Enthusiasts Club	\$-	\$250,000
Anti-Polar Bear Action League	\$-	\$75,000
Fuzzy Friends Foundation	\$30,000	\$-
Total Revenue		\$355,000

Total Program Cost:
\$300,000

Total Revenue should not exceed total program cost.



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Salary Calculation

Salary Percentage Calculation: Total salary cost should reflect the percentage of time committed to the program, not the full salary.

Personnel & Benefits				
Position	Staff Member	Total Cost	Foundation Request	Cost Justification and Calculation
Panda Play program manager	Marlon Perkins	\$75,000	\$5,000	Oversees day-to-day operations of the Panda Play program and provides supervision to the program coordinator. Total cost calculated at \$75,000 annual salary x 45% FTE = \$33,750. Of this total cost, the Mei Xiang Wildlife Organization is requesting \$5,000

Formula : Total cost calculated at annual salary x percent of full-time equivalent (FTE) dedicated to the program = program cost



Alignment Issue

Panda Play program leader	Caroline Seitz	\$55,000	\$2,000	Oversees day-to-day implementation of the Panda Play program. Total cost calculated at \$55,000 annual salary x 100% FTE = \$55,000. Of this total cost, the Mei Xiang Wildlife Organization is requesting \$2,000
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From the Narrative: Our program is led by program manager Marlon Perkins and **program coordinator** Caroline Seitz, who both have decades of experience protecting wildlife and supporting positive outcomes for endangered species.

Alignment of Titles: Job title in executive summary and budget narrative are inconsistent.



Alignment Issue

Panda Play teaching specialist	Steve Irwin	\$45,000	\$5,000	Oversees design of fitness routines for the Panda Play program. Total cost calculated at \$45,000 annual salary x 100% FTE = \$45,000. Of this total cost, the Mei Xiang Wildlife Organization is requesting \$5,000
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Staff should not be included with other staff descriptions:

Our program is led by program manager Marlon Perkins and program coordinator Caroline Seitz, who both have decades of experience protecting wildlife and supporting positive outcomes for endangered species.

Staff included in budget and budget narrative is not included in the executive summary.



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Wrong Internal Calculation

			Fringe benefits cover FICA, workers compensation, unemployment, health insurance, and retirement, calculated at 20.6% of total salaries.
<i>Fringe Benefits (@20.29%)</i>	\$35,508	\$2,352	

Fringe calculated at 20.6% instead of Howards approved rate of 27.40%

Calculation as follows: Foundation salary request x .274= fringe benefits



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Incorrect Cost Calculation

Line Item	Total Cost	Foundation Request	Cost Justification and Calculation
Panda food/snacks	\$745	\$-	Includes healthy snacks for pandas in our programs, to ensure they have access to nutritious bamboo during program activities. Total cost calculated at \$160 per panda x five pandas served = \$745. The Mei Xiang Wildlife Organization is not requesting any funds for this line item.

—

Check your math !



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No Cost Calculation

Panda Play program exercise equipment	\$25,000	\$5,000	Includes cost of installing new developmentally-appropriate play structures for pandas to climb and swing on, which helps pandas build the survival skills necessary to re-integrate into their natural habitats.
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Show your math !



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We're Not Paying for this!

			Includes cost of staff travel to the National Exotic Slugs Wildlife Convening, which will improve staff knowledge of other creatures served by the Mei Xiang Wildlife Organization's conservation efforts. Total cost calculated at \$265 for convening registration + \$1,000 for round-trip travel + \$1,500 for lodging for one week + \$510 for meals and incidentals for one week = \$3,275 x three staff = \$9,825. Of this total cost, the Mei Xiang Wildlife Organization is requesting \$3,000
Staff Travel	\$9,825	\$3,000	

Cost is not relevant to the foundation's mission or the purpose of the request. (Relevance would also apply to charging costs for staff not in the budget.)



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Show your math!

Staff Training	\$3,000	\$-	The Mei Xiang Wildlife Organization is not requesting funds for this line item.
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Cost breakdown must be shown for all program line items even if you are not including the cost in the foundation request.



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Real Costs!

Panda Play program volunteer incentives	\$3,374	\$1,743	Includes gift card incentives to encourage volunteers to complete 100 hours of service at the Panda Play program. Total cost calculated at \$67.48 per gift card x 50 volunteers annually = \$3,374. Of this total cost, the Mei Xiang Wildlife Organization is requesting \$1,743 for this line item.
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Funders do not like backwards math or math that shows that you are trying to get a final even request number.



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Total Request vs Request Cost

PawPrints Software Subscriptions	\$500	\$1,200	Includes annual subscription costs for our PawPrints data collection and evaluation software, to ensure we track all outcomes related to the Panda Play program. Request calculated at \$400 per subscription per staff per year x three staff = \$1,200
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Check that the total request verse the request cost make sense!



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Know your ask!

<i>Total Budget</i>	\$ 314,757	\$ 30,000
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They provide grants up to \$25,000 to organizations working to improve the health and survival of endangered wildlife.

Unless you have discussed with a foundation, do not ask for more than their maximum award!



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Take Our Survey

Proposal Writing
and Budgeting Training Survey

