

**Proposal Development - Outline**

**Project:**

**Agency:**

**Key Areas to Consider:** The Proposal should always reflect:

* The interests of the Foundation: *\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*

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* The Charity and it’s obstacles and opportunities *\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*\_

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* The larger needs and issues in society that the charity’s mission is focused upon.\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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It should take an Educational approach. Don’t assume that the reader knows who we are and what we do. Even if they have funded the charity in the past.

* Leads the reader through a series of “lessons” about the charity and the needs or issues we serve.
* The “lessons” are always geared to the specific interest of the “learner”.
* The best proposals start off with general information and move to specific. It is here that the Foundation will begin to see the connection with its own interests.

By presenting “broad needs in society” which match up with their stated interest or funding patterns, the proposal connects them to your proposal early, then as you get more specific about how you will accomplish the task, shows how you have planned your project thoroughly.

(Our project directly addresses the problem of [broad issue] by . . . . .)

**QUESTIONNAIRE:**

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### Foundations/Corporate Giving Programs should care about this project that focus on:



How this project does this:



**Who will this project effect?**

\_\_\_ Society \_\_\_ County \_\_\_ World Missions

\_\_\_ Region \_\_\_ City \_\_\_ Business Community

\_\_\_ State \_\_\_ Local Church \_\_\_ Other \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

How:

\_\_

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**How does this project:**

A.) Help The charity meet its mission statement

\_\_

\_\_

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**What are the projects Specifics?**

Overview

Process

Tasks

Timeline

Budget

**Evaluate – How will we know this was a success?**

Method of Evaluation:

Expected Outcomes

### Cover Letter

* It is important because it is the first piece of information read by the foundation.
* Usually no longer than one page.
* Should talk about:
  + The charity
  + The Support of the Board of Directors for the project
  + The specific financial request being made.
* Begin by telling the foundation the amount of the request and its purpose.
* The middle section explains the proposal’s highlights.
* Close by thanking the foundation for considering the request and indicate who will be calling to follow up – and when.
* Suggest a meeting in the close to answer any questions and provide more information.
* Indicate contact person.
* Should be signed by The Executive Director or the president of the board – or both.

EXAMPLE:

The charity is submitting this proposal to the (Foundation Name) for a (Amount) grant to (what it is needed for). This new (object/program/service) will (benefit). . .

The board of directors of the charity believes (project) will (solution to what problem). They sincerely hope you will respond favorably to our (request for funds/ invitation for financial partnership).

Our (position), (Name) will contact you in the next (time frame) to see if you have any questions about our proposal. Thank you for your consideration.

Sincerely,

### The Need: (Problem Statement)

* Sets the basis for everything that follows.
* No mention of the charity yet; fairly factual and based on outside sources.
* Shows that there are specific and mostly unmet needs that if met, could help resolve a number of problems, both for individuals and for the community.
* Touches on preventative measures that reduce costs, or alleviate other problems.
* Raises some unresolved questions centering on the availability of the needed service/project.
* This section should make the case for whatever the charity is trying to accomplish “out there” in the real world, before it addresses who we are and what we specifically plan to do.
* Should always speak to the broader purpose – it should answer the question “what is beyond the organization that can be – and should be – changed, corrected, or improved?”
* Can be the first point in the proposal where the foundation begins to connect with their funding interests.

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### Mission: (Why the Charity Exists)

* Presents the mission statement which will help the foundation better understand how the specific programs and services, as well as the planned project, fit within the general purposes of the charity, and relate to the specific interests of the foundation.
* Shows that the mission statement is not just words on a page, but is the guide to all planning and evaluation of its effectiveness.
* The charity does indeed have a long-range plan, and that the board and staff are engaged in the planning and evaluation process. (mission-driven planning)

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### Background

* Recounts the development and evolution of the charity.
* Demonstrates the willingness to change in response to the changing needs of the people we serve.
* Shows that the charity is flexible and responsive, rather than stubbornly trying to cling to an outdated service model.

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### Current Services and Programs

* Presents what we clearly do well and how we evaluate and plan.
* Describes the programs and gives numbers served. (Quantitative Data)
* Opportunity to display effectiveness of the services. Helps build needed credibility for requested funding.
* Should highlight that the charity is well managed and continually evaluating the effectiveness and efficiency of our programs. Additionally, that we are flexible in response to the changing needs of the people we serve.
* Descriptions of programs and services MUST be in keeping with our mission statement.

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### Staffing and Sources of Support

* Presents a quick overview of the size and cost of operations
* Numbers of regular staff, and ***volunteers***. Talk about volunteers as much as possible. ( Illustrates frugality )
* Figures from our most recent operating budget. Various sources of income should be shown as percentages. Builds confidence that we don’t rely on large grants for inappropriate percentages of income.

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Follow the bullet points above to provide an overview of this information.

### Planned Project/Program (What you will do to address the Problem Statement)

* This is where the case is made for the new project/program, and for the specific needs the foundation will be asked to support. *Main Idea:* The charity has carefully developed the plan for the new program.
* Project/Program is focused directly on the specific needs that have been demonstrated to exist in the community, and provides a unique solution to the specific problem.
* The project has been planned for maximum cost-efficiency.
* Must project an image of having “thought it through”. Before the project has been implemented, the charity went out and got information and opinions so the plan will be the best possible.
* Shows that the charity is very cost-conscience.
* Presents how the charity will continue to fund the project – beyond this grant.

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### Evaluation (How you know it was worth the investment)

* Includes several ways to measure success while providing ways to correct potential problems and get input from the people served by the project/program.
* Results should be shared with leadership and staff, and input sought. Illustrates that the charity shares an openness and freedom of expression.

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### Grant Request

* The “point” of the proposal
* Only one sentence long. If everything else has been properly presented, that’s all that is needed.
* If there are special conditions – these should be explained here.

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