Designing a Successful Funding Proposal

DESIGNING A SUCCESSFUL FUNDING PROPOSAL

Preparing an application for a foundation or service club is part of a process of planning and of research on, outreach to, and cultivation of potential foundation and corporate donors. This process is grounded in the conviction that a partnership should develop between the non-profit and the donor.

When you spend a great deal of your time seeking money, it is hard to remember that it can also be difficult to give money away. In fact, the dollars contributed by a foundation or corporation have no value until they are attached to solid programs in the non-profit sector.

This truly is an ideal partnership. Non-profit agencies have the ideas and the capacity to solve problems, but no dollars with which to implement them. The foundations and corporations have the financial resources but not the other resources needed to create programs. Bring the two together effectively, and the result is a dynamic collaboration.

A proposal must convince the prospective donor of two things:

- that a problem need of significant magnitude exists,
- and that the applicant agency has the means and the imagination to solve the problem or meet the need

While some foundations may provide an application guide, most do not. The following outlines a successful process that you can follow to prepare dramatic applications for the consideration of foundations and service clubs.

There's no trick to grant seeking. It's not a game. It requires good planning and hard work. Planning the project out thoroughly is the single best thing you can do to insure a good proposal. Once you have designed the project, noting its intent and steps to establish it, then you can draft your proposal.

Be prepared to invest a great deal of time towards this process. Successful grant proposals are not commonly written the evening before the submission deadline. While agencies are often under duress because of funding needs, a successful application will demand a commitment from Board members and staff.

You need to follow a step-by-step process in the search for private dollars. It takes time and persistence to succeed. After you have written a proposal, it could take as long as a year to obtain the funds needed to carry it out. And even a perfectly written proposal submitted to the right prospect may be rejected.

Raising funds is an investment in the future. Your aim should be to build a network of foundation and corporate funders, many of which give small gifts on a fairly steady basis and a few of which give large, periodic grants. By doggedly pursuing the various steps of the process, each year you can retain most of your regular supporters and strike a balance with the comings and goings of larger donors.

The first thing you will need to do in writing the master proposal is to gather the documentation for it. You will require background documentation in three areas: concept, program, and expenses.

If all of this information is not readily available to you, determine who will help you gather each type of information. If you are part of a small non-profit with no staff, a knowledgeable board member will be the logical choice. If you are in a larger agency, there should be program and financial support staff who can help you. Once you know with whom to talk, identify the questions to ask. This data-gathering process makes the actual writing much easier. And by involving other stakeholders in the process, it also helps key people within your agency seriously consider the project's value to the organisation.

RULES

There are some basic guidelines that you must follow:

1) Be Brief

The proposal must be brief and consist of no more than two to three pages, accompanied by support documentation in a binder. Place yourself in the shoes of the people that you are approaching. They may be volunteers or paid staff. Regardless, they do not wish to plough through page after page of material that may only be interesting to you.

Here is an example of being wordy:

> *"A detached fragment of the terrestrial lithosphere, whether of igneous, sedimentary, or metamorphic origin, and whether acquiring its approximation to sphericity through hydraulic action or other attrition, when continuously maintained in motion by reason of the instrumentality of gravitational forces constantly acting to lower its centre of gravity, thus resulting in a rotational movement around its temporary axis and with its velocity accelerated by any increase in the angle of declivity, is, because of. abrasive action produced by the incessant but irregular contact between its periphery and the contiguous terrain, effectively prevented from accumulating on its external surface any appreciable modicum of the cryptogamous vegetation normally propagated in umbrageous situations under the optimum conditions of undeviating atmospheric humidity, solar radiation, quiescence, and comparative sequestration from erosive agencies. "*

or more concisely:
"A rolling stone gathers no moss."

A concise proposal demonstrates your respect for the time that they have to commit to your application and your ability to succinctly outline your request.

2) Be enthusiastic and positive

Write persuasively - you're selling a concept - you're not writing a term paper. You will be writing about a program or project that will inevitably, hopefully, have a very positive impact on some people that have defined needs or problems. Put your heart into it and let the reader feel how you feel.

Set a positive tone when writing a proposal. Using conditional language only gives outlook for your project:

- "We would like to . . ."
- "We may include. . ."
- "Possible results might be . . ."
- "Dr. Smith may be invited to . ."

Instead, march boldly forward in your proposal with positive language such as:

- "We will. . . "
- "Programs will include. . ."
- "The results will be . . ."
- "Dr. Smith will participate. . ."

3) Write for each foundation

There is no such thing as a fill-in-the-blank proposal that can be just mailed to a list of potential funders. No matter what you've been told, don't write one proposal and then mail it out to a bunch of potential funders. Each grant maker should receive a different, highly personalised proposal, fitting "to the letter" whatever guidelines they require.

Grant makers want good proposals. They will help you. Call them and ask questions - but be sure you've done your homework first and that you're not asking a question already answered in their literature.

4) Be Clear

Remember the reader, above all. Write so the reader, any reader, from any profession, can read your proposal. Do not assume that they know everything about your client base or aspect of the social service field. No jargon! Use simple, clear, concise sentences. Writing is easy. It's about 20% of the issue in grants acquisition. It's only hard if you have nothing to say! Write so that a stranger knows what you are talking about!

Be careful not to write sentences that sound pretty but don't say anything.

> "We *will put the project to the test by studying factors that have some opportunity of enhancement of its various facets to lead to successful working partnership."*

Those are nice words in there but do they say anything? No. How about this?

"Project evaluation will include a pre- and post-questionnaire of participants with questions specifically designed to measure their perceptions of the effectiveness of the community partnership (Objectives 1 and 2)."

A proposal should reflect planning, research and vision. The importance of research cannot be overemphasised, both in terms of the funders solicited and the types of funds requested. The appropriate format should be used, and the required attachments should be included.

The most successful proposals are those which clearly and concisely state the community's and organisation's needs and are targeted to donors which fund that field, a reflection of careful planning and research.

There are factors all funders consider "highly important":

- project purpose
- feasibility
- community need for the project
- applicant accountability
- competence

Other factors also considered important include:

- project logic
- probable impact
- language
- money needed
- community support
- innovative
- not too ambitious
- well-documented
- not too narrow
- not rambling
- well-focused
- exciting

- detailed
- well-developed
- realistic
- currently relevant

5) Prepare an attractive proposal

Proposals should not be submitted bound, as funders often dismantle the proposal and make copies of it when referring it to a review committee for consideration. To assemble a proposal, an organisation should consider using staples, a folder or a three ring binder to contain the proposal and attachments.

Funders do not judge a proposal on its weight, but on its contents and presentation. Thus, it is important to assemble the proposal in an organised, concise, and attractive manner. First impression counts so an attractive binder and well presented materials quickly demonstrates your commitment to the process.

LETTER OF INTENT

Some foundations/corporations prefer a letter of inquiry to determine whether the applicant falls within the foundation's guidelines. In this case, an inquiry letter used instead of a cover letter and proposal. It must very concise and attachments are not included. If the funder determines the organisation and project fit within its scope, the organisation will be directed to submit a complete proposal. If not, a decline letter is usually issued at that time.

A letter of inquiry should meet the following criteria:

- Includes the funder's name, title, and address
- Is directed at the individual responsible for the funding program. Provides a brief overview of the organisation and its purpose. Includes the reason for the funding request
- Includes the amount requested (if required by funder)
- Describes the need the project intends to meet (including target population, statistics, example)
- Provides a brief description of the project
- Lists other prospective funders for the project
- Includes a thank you and next step to be taken
- Does not exceed two pages (one page is recommended)
- Includes name and phone number of contact at the organisation
- Is signed by the person who can speak with authority on behalf of the organisation

THE PROPOSAL

It will consist of a cover letter preceding a two page application supported by appendices.

The cover letter serves as the organisation's introduction and should always accompany a proposal. A cover letter, written on your letterhead, should meet the following criteria:

Includes funder's name, title, and address

Is directed at the individual responsible for the funding program (is not addressed "To Whom It May Concern", "Dear Sirs", etc. - call for a name)

- Provides a brief overview of the organisation and its purpose
- Includes the reason for the funding request
- Includes the amount requested (if required by funder)
- Is one page in length
- Includes name and phone number of contact at the organisation

- Is signed by the person who can speak with authority on behalf of the organisation

It's hard to be brief but you must be able to express yourself concisely and enthusiastically so that your proposal is no more than two — three pages. You can include appendices that support your comments.

Summary
(umbrella statement of your case and summary of the entire proposal)

Qualifications of the Organisation
(history and governing structure of the*not-profit; its primary activities, audiences and services and why it can successfully carry out this project)

Problem Statement or Needs Assessment
(why this project is necessary)

Program Goals and Objectives
(nuts and bolts of how the project will be implemented)

Methodology
(a step-by-step outline of the development and implementation of the project)

Evaluation
(a plan to determine the project's success)

Budget
(financial description of the project plus explanatory notes)

Conclusion
(summary of the proposal's main points)

APPENDICES
(Supporting materials)

1) Summary

This section clearly and concisely summarises the request. It should provide the reader with a framework that will help him/her visualise the project. The remainder of the proposal will then serve to deepen and amplify the "vision" presented in the summary section at the beginning.

While the summary is the first section, it is the last one that you should write. Once you have completed the other sections, it will be much easier to prepare the summary and insert it at the beginning of your proposal.

A summary should meet the following criteria:

- Appears at the beginning of the proposal
- Identifies the grant applicant
- Includes at least one sentence on credibility
- Includes a brief statement of the problem or the need your agency has recognised and is prepared to address
- Includes at least one sentence on objectives
- Includes at least one sentence on methods
- Includes total cost, funds already obtained and amount requested in this proposal
- Is brief (limited to a couple of paragraphs at most)
- Is clear
- Is interesting

If the funder reads beyond the summary, you have successfully piqued their interest. Your next task is to build on this initial interest in your project by enabling the funder to understand the problem that the project will remedy.

2) Qualifications of the Organisation

This section describes the applicant agency and its qualifications for funding and establishes its credibility. The programs and accomplishments of the organisation will be examined in light of how they address current demographics, social issues, specific constituencies, etc. In addition to convincing the funder of the extent of the need for the proposed project, the agency must also demonstrate that theirs is the appropriate agency to conduct the project. In this section, the organisation should demonstrate that it has the means and the imagination to solve the particular problem or meet the need.

A proposal will often sink or swim based on the need for the project and the project methodology, not on the accomplishments of the overall organisation. Therefore, an agency should not make the mistake of devoting half of its proposal to the history or programs of the agency.

The proposal should address the projects and programs the organisation intends to undertake over the next twelve to fifteen months. If growth is projected in the program, anticipated goals should be stated, as should any new projects to be undertaken. If a detailed program description or annual report exists, it should be included as the first item in the proposal appendices.

The qualifications of the organisation section should meet the following criteria:

- Clearly establishes who is applying for funds
- Briefly addresses the rationale for the founding of the organisation
- Describes applicant agency's purposes and long-range goals

- Describes applicant's current programs and activities
- Describes applicant's clients or constituents
- Provides evidence of the applicant's accomplishments
- Offers statistical support of accomplishments
- Offers quotes/endorsements in support of accomplishments
- Supports qualifications in area of activity in which funds are sought (e.g. research, training)
- Describes qualifications of key staff members
- Provides other evidence of administrative competence
- Leads logically to the problem statement
- Is as brief as possible
- Is interesting

It is not necessary to overwhelm the reader with facts about your organisation. This information can be conveyed easily by attaching a brochure or other prepared statement. Tell the reader when your non-profit came into existence; state its mission, being certain to demonstrate how the subject of the proposal fits within or extends that mission; and describe the organisation's structure, programs, and special expertise.

You can allude to the following in the summary but most of the information should appear in the appendix:

- Discuss the size of the board, how board members are recruited, and their level of participation. Give the reader a feel for the makeup of the board. (include the full board list in an appendix.)
- If your agency is composed of volunteers or has an active volunteer group, describe the function that the volunteers fill.
- Provide details on the staff, including the numbers of full and part-time staff, and their levels of expertise.
- Describe the kinds of activities in which your staff engage.
- Explain briefly the assistance you provide.
- Describe the audience you serve, any special or unusual needs they face, and why they rely on your agency.
- Cite the number of people who are reached through your programs.
- Cite your agency's expertise, especially as it relates to the
- subject of your proposal.

3) Problem Statement or Needs Assessment

When seeking funds, a specific problem area or need should be addressed. This is a critically important section of the proposal. Information based on objective research, not subjective impressions, should be provided to justify the need or problem. This data, however, should not be voluminous, but sufficient to demonstrate that a problem or need exists. A problem statement or needs assessment should meet the following criteria:

- Describe the target population to be served
- Defines the community problem to be addressed and the need in the geographical area where the organisation operates
- Is related to the purposes and goals of the applicant agency
- Is of reasonable dimensions - not trying to solve all the problems of the world
- Is supported by relevant statistical evidence (appendix)
- Is supported by relevant anecdotal evidence (appendix)
- Is supported by statements from authorities (appendix)
- Is stated in terms of clients' needs and problems - not the applicant's
- Is developed with input from clients and beneficiaries
- Is not the "lack of a program", unless the program always works
- Makes no unsupported assumptions

- Is as brief as possible
- Is interesting to read
- Is free of jargon
- Makes a compelling case

You want the need section to be succinct, yet persuasive. Like a good debater, you must assemble all the arguments. Then present them in a logical sequence that will readily convince the reader of their importance. As you marshal your arguments, consider the following six points.

First, decide which facts or statistics best support the project. Be sure the data you present are accurate. There are few things more embarrassing than to have the funder tell you that your information is out of date or incorrect. Information that is too generic or broad will not help you develop a winning argument for your project. Information that does not relate to your organisation or the project you are presenting will cause the funder to question the entire proposal. There also should be a balance between the information presented and the scale of the program.

Second, give the reader hope. The picture you paint should not be so grim that the solution appears hopeless. The funder will wonder whether an investment in a solution will be worthwhile. Here's an example of a solid statement of need: "Breast cancer kills. But statistics prove that regular check-ups catch most breast cancer in the early stages, reducing the likelihood of death. Hence, a program to encourage preventive check-ups will reduce the risk of death due to breast cancer." Avoid overstatement and overly' emotional appeals.

Third, decide if you want to put your project forward as a model. This could expand the base of potential funders, but serving as a model works only for certain types of projects. Don't try to make this argument if it doesn't really fit. Funders may well expect your agency to follow through with a replication plan if you present your project as a model. If the decision about a model is affirmative, you should document how the problem you are addressing occurs in other communities. Be sure to explain how your solution could be a solution for others as well.

Fourth, determine whether it is reasonable to portray the need as acute. You are asking the funder to pay more attention to your proposal because either the problem you address is worse than others or the solution you propose makes more sense than others. Here is an example of a balanced but weighty statement: "Drug abuse is a national problem. Each day, children all over the country die from drug overdose. In the city's east side the problem is worse. More children die here than any place else. It is an epidemic. Hence, our drug prevention program is needed more in this area than in any other part of the city."

Fifth, decide whether you can demonstrate that your program addresses the need differently or better than other projects that preceded it. It is often difficult to describe the need for your project without being critical of the competition. But you must be careful not to do so. Being critical of other non-profits will not be well received by the funder. It may cause the funder to look more carefully at your own project to
see why you felt you had to build your case by demeaning others.

The funder may have invested in these other projects or may begin to consider them, now that you have brought them to their attention. If possible, you should make it clear that you are cognisant of, and on good terms with, others doing work in your field. Keep in mind that today's funders are very interested in collaboration. They may even ask why you are not collaborating with those you view as key competitors. So at the least you need to describe how your work complements, but does not duplicate, the work of others.

Sixth, avoid circular reasoning. In circular reasoning, you present the absence of your solution as the actual problem. Then your solution is offered as the way to solve the problem. For example, the circular reasoning for building a community swimming pool might go like this: "The problem is that we have no pool in our community. Building a pool will solve the problem." A more persuasive case would cite what a pool has meant to a neighbouring community, permitting it to offer recreation, exercise, and physical therapy programs. The statement might refer to a survey that underscores the target audience's planned usage of the facility and conclude with the connection between the proposed usage and potential benefits to enhance life in the community.

This seems like a lot of information but it is presented in order for you to consider all the needed information and present it succinctly. Short, concise information captures the reader's attention.

4) Program Goals and Objectives

This section of the proposal describes the outcomes of the grant in measurable terms. It is a succinct description of what the organisation hopes to accomplish and by when. Each goal should be clearly stated and have an associated time frame. Program goals and objectives should meet the following criteria:

- At least one objective for each problem or need committed to in the problem statement
- Objectives are outcomes
- Objectives are not methods
- Describes the population that will benefit from the program
- States the time by which objectives will be accomplished
- Objectives are measurable and quantifiable (if at all possible)

Objectives are the measurable outcomes of the program. They define your methods. Your objectives must be tangible, specific, concrete, measurable, and achievable in a specified time period. Grant seekers often confuse objectives with goals, which are conceptual and more abstract. For the purpose of illustration, here is the goal of a project with a subsidiary objective

Goal: Our after-school program will help children read better.

Objective: Our after-school remedial education program will assist fifty children in improving their reading scores by one grade level as demonstrated on standardised reading tests administered after participating in the program for six months.

The goal in this case is abstract: improving reading, while the objective is much more specific. It is achievable in the short term {six months) and measurable (improving fifty children's reading scores by one grade level).

With competition for dollars so great, well-articulated objectives are increasingly critical to a proposal's success.

There are at least four types of objectives:

Behavioural - A human action is anticipated.
Example: Fifty of the seventy children participating will learn to swim.

Performance - A specific time frame, within which a behaviour will occur, at an expected proficiency level, is expected.
Example: Fifty of the seventy children will learn to swim within six months and will pass a basic swimming proficiency test administered by a certified lifeguard.

Process - The manner in which something occurs is an end in itself.
Example: We will document the teaching methods utilised, identifying those with the greatest success.

Product -- A tangible item *results.*
Example: A manual will be created to be used in teaching swimming to this age and proficiency group in the future.

By means of the objectives, you have explained to the funder what will be achieved by the project. The methods section describes the specific activities that will take place to achieve the objectives. It might be helpful to divide our discussion of methods into the following: how, when, and why.

How This is the detailed description of what will occur from the time the project begins until it is completed.

When: The methods section should present the order and timing for the tasks. It might make sense to provide a timetable so that the reader does not have to map out the sequencing on his own. The timetable tells the reader "when" and provides another summary of the project that supports the rest of the methods section.

Why: You may need to defend your chosen methods, especially if they are new or unorthodox. Why will the planned work lead to the outcomes you anticipate? You can answer this question in a number of ways, including using expert testimony and examples of other projects that work.
The methods section enables the reader to visualise the implementation of the project. It should convince the reader that your agency knows what it is doing, thereby establishing its credibility.

5) Methodology

This section describes the activities to be conducted to achieve the desired objectives. It also includes the rationale for choosing a particular approach.

Generally, a straightforward, chronological description of the operations of the proposed project works most effectively. The methodology section should meet the following criteria:

- Flows naturally from problems and objectives
- Clearly describes program activities
- States reasons for the selection of activities
- Describes sequence of activities
- Describes staffing of program
- Describes clients and client selection
- Presents a reasonable scope of activities that can be accomplished within the time and resources of the program
- Provides a timeline of activities (if possible)

6) Evaluation

Proposals must include a plan for determining the degree to which objectives are met and methods are followed. This section is extremely important as funders pay particular attention to evaluation methods since they need help determining whether a proposed project represents an intelligent investment for them.

An evaluation plan should not be considered only after the project is over; it should be built into the project. Including an evaluation plan in your proposal indicates that you take your objectives seriously and want to know how well you have achieved them. Evaluation is also a sound management tool. Like strategic planning, it helps a non-profit refine and improve its program. An evaluation can often be the best means for others to learn from your experience in conducting the project.

There are two types of formal evaluation. One measures the product; the other analyses the process. Either or both might be appropriate to your project. The approach you choose will depend on the nature of the project and its objectives. For either type, you will need to describe the manner in which evaluation information will be collected and how the data will be analysed. You should present your plan for how the evaluation and its results will be reported and the audience to which it will be directed.

The evaluation section should meet the following criteria:

- Presents a plan for evaluating accomplishment of objectives
- Presents a plan for evaluating and modifying methods over course the program
- Tells who will be doing the evaluation and how they were chosen
- Clearly states evaluation criteria
- Describes how data will be gathered
- Explains any test instruments or questionnaires to be used
- Describes the process of data analysis
- Shows how evaluation will be used for program improvements
- Describes any evaluation reports to be produced

7) Budget

When developing a budget, think project budget first. List every dollar it will take to run the — project. Don't forget support staff, copying charges, postage, memberships, telephone charges, meeting costs, and all the "hidden" expenses. Then think, what part of this budget is appropriate to request from the funder.

No grant maker will fund every cent of a project. They want to see your investment. Then put together an itemised list for the part of the overall budget you're requesting from the funder, the request budget. Use this request budget to fill out the grant maker's summary forms. Remember the forms you see are just summaries of line items; not the budget itself. The budget itself is those line items you used to complete the summary.

All proposals should include a budget which clearly delineates costs to be met by the funding source and those provided by other parties and outlines both administrative and program costs. If a proposal is for a specific project, separate budgets for the general operating budget and the special project budget should be included. Budgets should show income as well as expenses and should be structured in columnar form, listing the expense on the left and the dollar amount in the right column, according to general accounting/bookkeeping principles. Budgets should not be submitted in narrative form.

Budget expense information should delineate personnel costs such as salary and benefit information, and non-personnel expenses such as facility costs (rent/mortgage, utilities, maintenance, taxes), fundraising expenses, travel, postage, equipment costs, supplies, and insurance. These should be reflected in both the expense and income columns.

Sources of income should be listed separately as part of budget information. Sources should be actual funders, not merely prospects. However, pending proposals may be listed separately, if desired. Sources for funding may include fees for service, government funds, corporate/private grants, individual donations, etc. A budget should meet the following criteria:

- Tells the same story as the proposal narrative
- Is detailed in all aspects
- Includes project costs that will be incurred at the time of the program's implementation
- Contains no unexplained amounts for miscellaneous or contingency
- Includes all items asked of the funding source
- Includes all items paid for by other sources
- Includes all volunteers

- Includes all consultants
- Details fringe benefits, separate from salaries
- Separately details all non-personnel costs
- Includes separate columns for listing all donated services
- Includes indirect costs where appropriate
- Is sufficient to perform the tasks described in the narrative

You need to devote a few sentences to discussing the number of staff, their qualifications! and specific assignments. Details about individual staff members involved in the project can be included either as part of this section or in the appdndix, depending on the length and importance of this information.

"Staffing" may refer to volunteers or to consultants, as well as to paid staff. Most proposal writers do not develop staffing sections for projects that are primarily volunteer run. Describing tasks that volunteers will undertake, however, can be most helpful to the proposal reader. Such information underscores the value added by the volunteers as well as the cost- effectiveness of the project.

For a project with paid staff, be certain to describe which staff will work full time and which will work part time on the project. Identify staff already employed by your non-profit and those to be recruited specifically for the project. How will you free up the time of an already fully deployed individual?

Salary and project costs are affected by the qualifications of the staff. Delineate the practical experience you require for key staff, as well as level of expertise and educational background. If an individual has already been selected to direct the program, summarise his or her credentials and include a brief biographical sketch in the appendix. A strong project director can help influence a grant decision.

Describe for the reader your plans for administering the project. This is especially important in a large operation, if more than one agency is collaborating on the project, or if you are using a fiscal agent. It needs to be crystal clear who is responsible for financial management, project outcomes and reporting.

8) Conclusion

Every proposal should have a concluding paragraph or two. This is a good place to call attention to the future, after the grant is completed. If appropriate, you should outline some of the follow-up activities that might be undertaken to begin to prepare your funders for your next request. Alternatively, you should state how the project might carry on without further grant support.

This section is also the place to make a final appeal for your project. Briefly reiterate what your non-profit wants to do and why it is important. Underscore why your agency, needs funding to accomplish it. Don't be afraid at this stage to use a bit of emotion to solidify your case.

9) Appendices

As you have ideas of what to include in your proposal, write yourself a note and put it into the folder. When you are finally ready to write, it will be easier to organise your thoughts and recall the material that you wanted to include in the appendices.

Some attachments are recommended in all proposals, while others may be included at the author's discretion. If a recent article or endorsement has been written about your organisation, and if it is germane, it may be included as an attachment to the proposal. Generally funders will look at only one or two articles / endorsements. Therefore, your organisation must carefully select the best recent article/endorsement to submit. Additional attachments can be included at the author's discretion.

Appendices may include:

- Verification charitable status
- Names and affiliation of officers and Board of Directors members
- Financial statements for last completed fiscal year (audited, if available)
- Current general operating budget and special project budget (if applicable)
- Illustration clients served (include stories to make your assistance real)
- List of other current funding sources
- Biographies of key personnel (only if requested)
- Articles / endorsements (a few)
- Diagrams for equipment or building requests
- Organisation's by-laws

Include a table of contents for the attachments / appendices that enables the reader to quickly turn to the needed material. You could use tabs to identify each appendix that enables the reader to flip to it easily.

What Happens Next?

Submitting your proposal is nowhere near the end of your involvement in the grant making process. Grant review procedures vary widely, and the decision-making process can take anywhere from a few weeks to six months. During the review process, the funder may ask for additional information either directly from you or from outside consultants or professional references. Invariably, this is a difficult time for the grant seeker.

You need to be patient but persistent. Some grant makers outline their review procedures in annual reports or application guidelines. If you are unclear about the process, don't hesitate to ask.

If your hard work results in a grant, take a few moments to acknowledge the funder's support with a letter of thanks. You also need to find out whether the funder has specific forms, procedures, and deadlines for reporting the progress of your project. Clarifying your responsibilities as a grantee at the outset, particularly with respect to financial reporting, will prevent misunderstandings and more serious problems later.

Nor is rejection necessarily the end of the process. If you're unsure why your proposal was rejected, ask. Did the funder need additional information? Would they be interested in considering the proposal at a future date? Now might also be the time to begin cultivation of a prospective funder. Put them on your mailing list so that they can become further acquainted with your organisation.

Good luck with your fund raising efforts!

Funding Kit Checklist History of

your organisation Aims and activities

- ✓strategic plan
- ✓annual plan or goals

Legal status

- ✓copies of Constitution or Trust Deed
- ✓other evidence of legal status

Management systems

- ✓list of names and contacts of management
- ✓committee/trustees

Financial systems

- ✓copies of any financial policies
- ✓copies of audited accounts
- ✓bank'account details
- ✓Treasurer's name and contact details
- ✓GST and IRD number
- ✓annual budget
- ✓latest financial reports/updates
- ✓IRD tax exemption letter

Community support

- ✓copies of letters of support/appreciation
- ✓copies of newspaper articles or other publicity

Clients

- ✓annual statistics and comparisons

Reporting and evaluation

- ✓annual reports
- ✓summary of client satisfaction survey
- ✓summary of project/service evaluation

Commonly required application information.

Many fenders will require similar information to be included with your applications. It can be useful to keep this information routinely up to date so you can easily make funding applications.

Commonly required items include:

- annual accounts
- annual report
- budget
- brochure (outlining the general work of your group)
- business plan
- certificate of incorporation
- history of group
- latest bank statement
- letters of support
- list of trustees
- newsletters
- press clippings
- tax exempt status letter for non profit organisations other than charities
- trust deed or constitution
- statistics