FOUNDATION RELATIONS PROJECT PLANNING WORKSHEET

Program/Project Name: _____

- ☐ New Program/Project
- ☐ Existing Program/Project

Campus/College/Department: _____

Faculty/Staff Contact (name and title): _____

Email: _____   Phone: _____

Have you discussed this program/project with the department chair or dean?

- ☐ Yes
- ☐ No

How does this program/project fit within your department's and/or the university's strategic priorities?

_____

_____

_____

What challenge or opportunity does your program/project address? What problem is your work intended to solve?

_____

_____

_____

What near-term need will grant funding allow you to address? What goal will grant funding help you to achieve in the next one to two years?

_____

_____

_____

Provide a basic outline of your project workplan or program schedule.

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_____

_____

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What are the expected outputs and outcomes of your program/project?

_____

_____

_____

How will you evaluate the project? How will you know that the program/project is a success?

_____

_____

_____

Besides your own, whose commitment is necessary for the project to be successful?

_____

_____

_____

What amount of funding do you need to move the project forward?

_____

_____

_____

Will your program/project require ongoing funding?
- ☐ Yes
- ☐ No

Have you identified any potential funding sources? If so, please list and include your connection (if any) to the funding source.

_____

_____

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GRANT APPLICATION TIPS

Many private foundations have their own specific applications and guidelines to follow for submissions. The below is intended to be helpful in preparing for those specific questions or for when a potential funder asks for a narrative about your project.

WRITING A GRANT PROPOSAL

Structure, attention to detail, concise persuasive writing and a reasonable budget are the critical elements of the writing stage.

Statement of need

Purpose, goals, measurable objectives and a compelling, logical reason why the proposal should be supported; background provides perspective and is often a welcome component

Approach

Method and process of accomplishing goals and objectives, description of intended scope of work with expected outcomes, outline of activities, description of personnel functions with names of key staff and consultants, if possible

Method of evaluation

Some require very technical measurements of results. Inquire about expectations.

Project timeline

Paints a picture of project flow that includes start and end dates, schedule of activities and projected outcomes; should be detailed enough to include staff selection and start dates

Credentials

Information about the applicant that certifies ability to successfully undertake the proposed effort; typically includes institutional or individual track record and resumes

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TIPS ON WRITING THE NARRATIVE

Narratives typically must satisfy the following questions:

- What do we want?

- What concern will be addressed and why is it important?

- Who will benefit and how?

- What specific objectives can be accomplished and how?

- How will results be measured?

- How does this funding request relate to the funder's purpose, objectives and priorities?

- Who are we (organization, independent producer) and how do we qualify to meet this need?

The HOOK

There are many ways to represent the same idea. However, the HOOK tailors the description of the idea to the interest of a particular funder. The HOOK aligns the project with the purpose and goals of the funding source. This is a critical aspect of any proposal's narrative because it determines how compelling reviewers will perceive your submission to be.

TIPS ON CREATING YOUR BUDGET

Budgets are cost projections. They are also a window into how projects will be implemented and managed. Well-planned budgets reflect carefully thought-out projects. Be sure to only include those things the funder is willing to support.

Funders use these factors to assess budgets:

- Can the job be accomplished with this budget?

- Are costs reasonable for the market — or too high or low?

- Is the budget consistent with proposed activities?

- Is there sufficient budget detail and explanation?

Many funders provide mandatory budget forms that must be submitted with the proposal.

Don't forget to list in-kind support and matching revenue, where appropriate. Be flexible about your budget in case the funder chooses to negotiate costs.

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